

# Branding & Promotion Campaign:

Analyzing Higher Education Consulting, Reviewing S4HE Brand and  
Expanding Their Client Base



An Interactive Qualifying Project Report submitted to the faculty of Worcester Polytechnic Institute in partial fulfillment of the requirements for the Degree of Bachelor of Science.

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**WPI S4HE**

## Acknowledgements



Dr. David Ferguson joined the S4HE team in the final year of his life. Although he is now part of S4HE's history, his career and life continue to shape S4HE. A nationally known leader at the intersection of diversity and innovation, Dr. Ferguson was a frequent reviewer of the National Science Foundation and supporter of STEM institutions.



Dr. Karen Oates has earned a special thanks for advising and sponsoring this project. Her persistent guidance and comments have been instrumental in the project and my education. From catering to my scheduling of the project (over the summer, A and B term) to opening the doors of her company, I could not ask for more. Thanks to her upbeat, forward thinking directive, I never felt like I was working alone, despite no official teammates.



Dr. Amy Marie Shachter was helpful in the beginning and end of the project. In a video chat early in the project, she helped me understand the partnerships dynamic and later on answered a few questions to better understand the current status and possible future of S4HE.

## Abstract

This IQP project aimed to examine and expand Success for Higher Education, a national higher education consulting firm's branding and promotion. Starting with Dr. Karen Kashmine Oates, S4HE's current position in the larger higher education industry was researched and positioned. The strengths of S4HE were then analyzed to more specifically position S4HE in the market. A set of website recommendations were created to advertise the brand with a plan for continued updates and sustainability. S4HE's brand was then used to promote their institutes. The first approach to promotion was a cold emailing campaign. Emails were obtained from a list of leads from The American Council on Education. Similar leads from the area were found until emails for 100 possible leads for an institute held at Roosevelt University in Chicago were recorded. Finally, a series of recommendations were delivered for the sponsor to increase brand visibility.

Keywords: S4HE, Success for Higher Education, Promotion, Branding, Networking, Email Campaign, Institute, New Associates, Leads

## Executive Summary

### Background Overview

To best understand S4HE, the history of the two partners must be understood. After getting her BS from RIT and then Ph.D. in Biochemistry from George Washington University Medical Center, Dr. Karen Kashmanian Oates worked as a visiting scientist at The National Institutes of Health, National Cancer Institute Oncology and Hematology Division. She began her academic career as associate dean for George Mason's newly established College of Integrated and Interdisciplinary Studies where she developed the university's New American College environment. Later, while serving as inaugural provost for the Harrisburg University of Science and Technology, she established the National Center for Science and Civic Engagement, or NCSCE. While getting Harrisburg University up and running, she also directed NSF funds to SENCER, (Science Education for New Civic Engagements and Responsibilities) an organization that improves undergraduate STEM/STEAM education by connecting learning to critical civic questions.

Dr. Oates reputation as a results oriented yet personable leader earned her the position at the prestigious National Science Foundation, or NSF as Deputy Director of the Division of Undergraduate Education. Armed with a 35 dedicated associates and \$380 million dollar budget, Dr. Oates used innovative undergraduate and graduate programs to revitalize American entrepreneurship and competitiveness. Comfortable but stagnated, Dr. Oates pivoted once more, securing a position at WPI as The Peterson Family Dean of Arts and Sciences. Standing testament to her dedication, associates and field experts have decorated Dr. Oates with numerous awards and honors, including: The Bruce Albert's Award, presented by the American Society to Cell Biology for excellence in science education reform; The Distinguished Public Service Award, the highest civilian honor presented by the City of Harrisburg Pennsylvania; The American Association for the Advancement of Science education inducted Dr. Oates as a fellow in 2012 and in 2016 a Sigma Xi recognized her as a distinguished lecturer. Dr. Oates now leads the WPI efforts for National Academy of Engineers – Global Grand Challenge Scholar program.

Both a high ranking strategist and front line pragmatic leader, Dr. Oates works with teams of professors on campus and teams of students on huge off campus projects to fully immerse herself in the school she leads. Despite her numerous successful tours across the world, Dr. Oates saw a need for a new kind of campaign. Throughout her career, Dr. Oates noticed one distinct factor that separates the best leaders: character. Dr. Oates sought to propagate the gravity of what she calls Value-Based Leadership, so she called upon a longtime colleague, Dr. Amy Marie Shachter, for help launching a private consulting firm called Success 4 Higher Education (S4HE).

Dr. Shachter earned her baccalaureate at Knox College and then Ph.D. in inorganic chemistry at the University of Colorado-Boulder. Throughout her career, Dr. Shachter has served in a number of academic leadership roles ranging from center director, associate dean, summer dean to provost-level administrative appointments. Her expertise ranges from creative models for faculty policies ranging and phased retirement for tenured faculty to adjunct faculty structures.

Currently, Dr. Shachter is an Associate Professor of Chemistry and Biochemistry at Santa Clara University. Her current portfolio as Senior Associate Provost of Research and Faculty Affairs at Santa Clara University spans strategic initiatives to every-day faculty support. In addition, Shachter serves as the co-principal investigator Science Education and Civic Engagement (SENCER), the longest continually funded NSF science education reform project. Lastly, she is co-director of the SENCER Center for Innovation-West and is a Senior Fellow for the National Center for Science and Civic Engagement.

Dr. Shachter excels at developing new programs, academic majors and minors as well as University-wide centers with special expertise in sustainability education, undergraduate research programs and multi-department major STEM strategies. A former Clare Boothe Luce professor, Dr. Shachter she leads programs aimed at supporting women faculty and students in STEM. The depth of Shachter's experience is in faculty affairs as well as collaborative governance issues. To promote her values of team development and sustainable resolutions, Dr. Shachter specializes in bridging differences and creative problem solving. Supporting Dr. Shachter in undergraduate education improvement are the Howard Hughes Medical Institute, the National Science Foundation, W.M.Keck Foundation, Fletcher Jones Foundation, and the Camille and Henry Dreyfus Foundation.

#### **S4HE**

Dr. Oates and Dr. Shachter met as colleagues in SENCER where they would later found Success 4 Higher Education, or S4HE. S4HE teaches participants to create an environment that maximizes the skills of themselves and then their communities, helping all involved parties achieve success. They are a small, two person firm with three new associates and provide one and two day institutes where Dr. Oates and Dr. Shachter lead workshops discussing value based leaders and conflict management. Institute advertisements are on their website, emails and trifold brochures. To promote these advertisements and the institutes, S4HE uses its member's career networks including colleges, higher education organizations and individuals to spread their message.

After years of success as higher education leaders, the S4HE team recombined, rescaled and reiterated their perspective on leadership. Beyond leadership experts, the S4HE partners pioneer and propagate what they call Value-Based Leadership, or VBAL. During one and two day institutes, S4HE partners prepare participants to compliment standards and uniformity with personalized structures and case by case approaches.

The firm promotes these institutes by leveraging its partner's reputation and relationships. A two year old firm, the partners began by reiterating their careers leadership lessons to the organizations they once lead. They advertise these institutes through their website, specific email lists and tri fold pamphlet advertisements. S4HE has recently introduced new associates, exponentiation collaboration opportunities for the firm.

## **Associates**

Dr. Jay Labov, Dr. Ellen Goldey and Dr. David Ferguson are long time colleagues of Dr. Oates and Dr. Shachter and their first associates. While officially retired, Dr. Labov continues his work as an academic leader by providing key support to the S4HE team. He spent much of his career preparing high school teachers to teach controversial topics and AP credits. He then continued establish policies for AP credit transfers. Dr. Goldey, the current Vice President of Academic Affairs and Dean of Centre College, shares S4HE's enthusiasm for value based leadership in higher education. Like Dr. Shachter, Dr. Goldey is a biologist but quickly embraced the liberal arts side of education as she rose through the leadership ranks. Now deceased, Dr. Ferguson was a champion of diversity in innovation and assists the S4HE team in teaching clients how Value-Based Academic Leadership benefits their organization. As the Associate Provost for Diversity and Inclusion at Stony Brook University Dr. Ferguson proved his dedication to moving forward as a team. In June 2019, Dr. Ferguson past away suddenly. Dr. Theo Koupeli joined as an advisor in August 2019.

## **Project Mission**

The goal of this IQP project is to facilitate the promotion of the Values Based Academic Leadership Institute. Recommendations for the website, emails and newsletters, and other promotional material to promote the firms institutes and a centralized database will be created to organize the emails and emailing campaigns.

## **Rebranding through the Website**

S4HE's website is critical to their brand. The website currently displays relevant information about the team, their areas of expertise and their institutes. Incremental changes to the website will tie all of these parts together. Additionally, the structure for each aspect of the website towards a simple mission statement and have a linear website flow which ends by promoting the institutes.

## **Promoting Institutes**

Critical to the success of the institutes are the people who participate. A critical mass of ideas and experiences enrich the institute so deans and presidents were targeted. To promote website traffic and institute attendance, S4HE uses two basic strategies, emailing and networking. Dr. Oates and Dr. Shachter have already produced a number of attendees through networking, and the focus of this project is through emailing. After finding emails for 100 leads within higher education leadership positions in the Chicago area for a Values Based Academic Leadership Institute held at Roosevelt University.

## **Measurement of Success and Moving Forward**

Developing the website helps S4HE articulate their brand better to the websites visitors. The success of the email campaign is measured in customers generated or lessons learned for the future, possibly using email analytics. As a result of this work a strategy and recommendations for future Values Based Academic Leadership Institute were delivered to the sponsor.

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# Chapter 1. Introduction

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## 1.1 Leadership

What is a leader? There are virtually infinite examples of leaders: wealthy company owner, the best athlete pulling ahead of the competition, a strong willed politician, a human rights activist, employers, parents, friends, we even lead ourselves. We are all leaders in our own capacity; the real question is: what is *good* leadership? The paragraphs that follow depict good leadership in Higher Education, give examples of good leaders, and then finally introduce the project objectives and scope.

Maryville University outlines four key traits for higher education leaders: Discipline, Outside-the-box thinking, Entrepreneurial, and gratitude (SEC, 2012-2019). Discipline is an obvious first quality for any high performing individual. In many ways, discipline is leading yourself and actually doing what you set out to do. Outside-the-box thinking is another critical asset to great leadership. Not only does unorthodox thinking foster new ideas, but a broader mindset can make working with different individuals easier. Entrepreneurial spirit is also critical for a leader in any business. More than just professors, the leaders of a college must consider the welfare of their school in every sense, including financial. Gratitude is the final key element to higher education leadership. Gratitude is a basic human courtesy which can be sometimes forgotten or done as a formality. More than just a simple thank you, gracious leaders understand their followers on an emotional level and have gotten their followers to invest in them. As a sort of dividend or token of good faith, good leaders let their followers think that they are valued members of the team and that their work is appreciated by the leader on a personal and company scope (SEC, 2012-2019).

These basic principles of leadership are applicable to higher education as well. From professors to presidents, leadership within the school is critical to the school as a business and educational institution. The partners of S4HE have served every role of higher education and are now offering these services to higher education leaders through institutes. These institutes are hosted by colleges across America including Roosevelt University, and is often co-hosted by SENCER, a science education organization which Dr. Oates previously directed.

Looking forward, higher education consulting firms promotional strategies will be analyzed further to see how their strategies might be implemented for S4HE. Within the scope of the project, S4HE's website could be updated to better help S4HE establish a consistent brand and speculate on how S4HE could develop their brand, especially considering their new associates. While the project might not actually generate new clients, the IQP could introduce new promotional strategies or perfect the current strategies. To accomplish these goals, semi structured interviews were conducted with each of the S4HE partners, further study the existing firms, and examine the current climate within the industry will be found to find market gaps.

Semi-structured interviews were used get an understanding of S4HE, and its partner's roles in the partnership. As explained in Mather's Fox's and Hunn's paper: *Using Interviews in a*

*Research Project*, “the open-ended nature of the question defines the topic under investigation but provides opportunities for both interviewer and interviewee to discuss some topics more in detail” (Mathers, 2002). This open ended aspect is key because the interviewees know more about the company, and their focus should guide my research.

The S4HE team has focused their institutes on Values-Based Academic Leadership. They break their services down in a few different ways, but the graphic demonstrates the scope and nature of their services.



Fig. 1 - Scope of S4HE’s Work

## 1.2 Goals

The project entails two basic aspects, 1) updating the website and 2) promoting the institutes. Understanding and specifying the brand of the firm is critical to the website development so understanding how S4HE’s services reflect Value-Based Academic Leadership is critical to both the website development and promotion strategy. To best understand S4HE’s brand, the report starts with the reputations from the two partners.

The website is a key aspect of S4HE’s brand. By updating the website, S4HE can more effectively communicate their value proposition and advertisements. To promote these institutes,

S4HE usually uses a combination of networking and emailing. Email lists are critical for reaching a large target audience while the networking is critical to promoting partnerships with colleges and other Higher Education firms. The background that follows examines other higher education consulting firms, S4HE's competition.

## Chapter 2. Background & Literature Review

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According to the Oxford dictionary, a consultant is someone "Engaged in the business of giving expert advice to people working in a specific field." From a business perspective, the advice is a product and the specific field is the market. The literature review that follows details the IQP Project: promoting S4HE. The review that follows explores the consulting industry.

### **2.1 Review of Active Higher Education Consultancy Firms**

Academic Impressions ([www.academicimpressions.com](http://www.academicimpressions.com)) serves colleges across the United States where they provide a number of paid and unpaid services. These services include: Blogs, webcast recordings, conferences, live webcasts, research & reports, books, short lessons & quizzes, campus workshops, assessments and executive coaching. For many of their services, a membership is required. Academic Impressions offers consulting on the following topics: Academic Affairs, Advancement, Business Office, Enrollment Management, Leadership and Student Affairs.

Academic Impressions offers many institutes, but does not introduce the team members. The website seems to focus on the products themselves and not the team members of Academic Impressions. The firm has two main revenue streams: subscriptions and institutes. Subscriptions gain clients access to a plethora of online resources and discounts to the institutes (Academic Impressions).

Like Academic Impressions, the Huron Group ([www.huronconsultinggroup.com](http://www.huronconsultinggroup.com)) website homepage emphasizes articles to develop their brand. After showcasing their areas of expertise, the homepage lists upcoming institutes to promote their product. The institute webpage advertises the specific topics covered and introduce the presenter. They specialize in business advisory, technology and enterprise solutions & analytics. Their long list of institutes offer expertise in a wide range of industries, from aerospace to automotive. While there were few clues to how they promote their institutes on their website, the long list of associates suggests that Huron team networks earned the firm a substantial portion of their clients.

Leading Huron Group are four talented executives: Jim Roth, Mark Hussey, John Kelly and Diane Ratekin. Jim Roth attended Vanderbilt University where he received a B.A. in political science and economics, eventually earning his MBA from Southern Methodist University. Jim spent over 35 years consulting leading research universities and academic medical centers and eventually founded Huron Group. Serving as president from 2011 until 2019, he eventually passed on the torch and is now the tenured Chief Executive Officer.

Rising to the challenge, Mark Hussey added president to his existing title of Chief Operating Officer. Mark attended the University of Illinois, Urbana-Champaign where he earned his B.S. in Accountancy and then an MBA from the University of Chicago's Graduate School of Business. Prior to joining the Huron Group in 2011, Mark's career spanned financial, accounting and investing services for large companies, including the Quaker Oats Company.

John Kelly attended the University Of Notre Dame where he received both his B.S. and M.S. in accounting. After becoming a certified Public Accountant in Illinois, he directed

investigations for disputes in manufacturing and services industries. He joined Huron's team in 2012 as Controller and eventually earned his way to become the Chief Financial Officer, Treasurer and Executive Vice President.

Diane Ratekin attended the University of Iowa where she completed her B.A. in English and then J.D. After earning admittance to practice law in Iowa and Illinois, she worked in the legal department of an investment firm for 17 years where she eventually became the director and team leader of the corporate and investment team. She then joined the Huron group in 2005 where she was named Huron's General Counsel, Corporate Secretary and the Executive Vice President (Huron Group).

The Keeling Associate website's homepage first presents a video showing institutes and college life, clearly positioning the firm in higher education. They then proudly lead with their mission statement: "We collaborate with the sharpest minds in higher education to better higher learning for all students, let's imagine the next changes together." After briefly introducing their areas of expertise, the firm introduces their associates and the institutes they lead. The logical progression on the homepage establishes a specific brand early and uses the rest of the website to build that brand. Their services are broken down into four simple aspects: Executive searches, Professional Development, strategy and organizational effectiveness. While not displaying the prices, the firm advertises institutes which detail what participants will learn at each institute. (Huron Group)

Lastly, the website ([www.dendros.com](http://www.dendros.com)) greets the browser in sign language with a video presentation, spells out their product and then introduces the core team. The partnership core is comprised of four individuals: Jonathan as, Yoshiko Chino, Adriana Robertson, and Suzann Eisenberg Murray. While a diverse team, common interest in non-profit businesses, teamwork and entrepreneurialism seem to unify the team.

The first partner represented, Jonathan Bucki highlights this common thread by shifts the reader's attention to the person in the picture. His short bio focuses on his "energetic, creative and humorous spirit to work," farther painting his picture as a person and sparing any long list of achievements. His short bio focuses on his "energetic, creative and humorous spirit to work," farther painting his picture as a person and sparing any long list of achievements.

Yoshiko 'Koko' Chino's bio details a dedicated career "active in national and international leadership on issues concerning the Deaf community and communication access and equity." After earning Summa Cum Laude in Signed Language Interpreting and master's in Public Administration, she earned the position of Executive Director of Gallaudet Interpreting Service (GIS) where she served for 8 years.

Like Bucki, Adriana Robertson's bio focuses on her background in yoga, and how she brings energetic growth to her classes. To quote her bio, "you can count on movement, mindfulness, and self-care techniques being embedded into all aspects of Adriana's work." After earning a degree in International Relations and Psychology, Adriana spent her career working in the areas of international and youth development, community building and public health.

Suzann Eisenberg Murray specializes in providing transitional leadership in difficult situations by serving clients with sensitivity, deep listening and an individual approach. Currently a consultant, Suzann's notable career includes 17 years as a corporate trainer and public relations executive in the private sector and then 18 years as directing various aspects of non-profit organizations.

An interpreter mentor and organizational consultant, Kevin Dyels and Len Aron provide support to the Dentros group as key associates. Together, they showcase an international presence amongst billion dollar corporations and small non-profits alike. Their list of services include consulting on: Strategic Planning, Interim Leadership, Search & Talent Development, Culture & Business Strategy, Facilitation, American Sign Language, Coaching & Leadership Development and a specific lesson plan: SagisSense Knowledge Transfer.

The Dendros group does not post their prices or promotional strategy on the website, but rather pushes potential clients to contact the group and inquire about their particular situation. Amongst their long list of clients are Science Education for New Civic Engagement Responsibilities and the Center for Science and Civic Engagement (SENCER and NCSCE). (Dendros)

Each of these firms define the higher education consulting industry, and act as models for S4HE, but key differences between the firms define each firm's position within the industry. Large firms with countless associates offer consulting on virtually unlimited topics while smaller firms emphasize their individual members. Larger firms offer a host of services, from online resources to institutes. Smaller firms seem to focus on the institutes specifically. Larger, established firms seem to use their free resources, company reputation and client base to promote their services. Smaller firms seem to rely mainly on the reputations and relationships of their partners and associates to continue to network.

## **2.2 Best Practices in Higher Education**

Setting the standard for higher education is the American Council on Education, or ACE. As a governing voice in higher education, the council addresses universal issues in current education. The council brings together a diverse group of higher education leaders and has earned itself an important role in consulting firms amongst many other higher educational institutions. (ACE, 2013) In a 2007 presidential study, Ace associates explain:

“ACE is dedicated to providing institutions with the support that they need, especially in these volatile times; to that end, we sought to distill these shared characteristics with the help of college presidents who participated in a recent roundtable and from insights obtained through the American College President Study 2017 (Soares 2018).”

While this study was of presidents specifically, their website detail their extensive focus on issues of Diversity & Inclusion, Student Support & Success, Internationalization & Global Engagement and Senior Leaders & Teams.

## Chapter 3. Methodology

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The paragraphs that follow detail the methodology followed to update the website and promote the institutes. The interviews and current website evaluation detail S4HE's current status in the market while the email campaign promoted the brand and institutes. The semi-structured interview was chosen because of its ability to direct the conversation in general while still letting the interviewee give a variety of answers. As explained by in Dr. Newton's paper The Use of Semi-Structured Interviews, "the 'unstructured' pole is closer to observation, while the 'structured use of 'closed' questions is similar to types of questionnaire" (Newton, 2019). This distinction shows that the semi-structured interview should be a combination of both: listening to what the S4HE members are talking about while also keeping the questions consistent so that a pattern between the two answers could be observed.

### 3.1 Interviews

Semi-structured interviews were conducted over the phone with the S4HE's partners to better understand S4HE's place in the consulting industry. The interview questions were:

- Why start S4HE?
- What are S4HE's greatest strengths?
- What do you add to S4HE?
- Can you tell me any stories about getting clients and promotion?
- How is S4HE different?
- What are your hopes for S4HE's future?

The questions are intended to uncover what the founders hoped to accomplish with the firm, what they believe their strengths are and what direction they hope to bring the company. The IRB was submitted and approved on June 3, 2019 and can be found in Appendix G

### 3.2 Website Evaluation

The table below was created through the website evaluations of the four S4HE competitors to compare their work with that of S4HE. The factors are standardized aspects of each website. In the table, flow refers to the natural progression of the website or how efficiently the viewer is exposed to the information. Visual Appeal refers to the aesthetic quality of the website including images and text spacing. Product description refers to the clarity with which the firm's services are detailed and finally associate information refers to how well the website introduces the associates. Criteria were rated 1-5, 1 being poor and 5 being excellent.



	Flow	Visual Appeal	Product Description	Expertise Noted	Testimonials	Mission Statement
Academic Impressions						
Huron Group						
The Keeling Associate						
Dendros Group						

Table 1 - Criteria for Website Evaluation

**3.3 Email Marketing Campaign**

S4HE relies mainly on personal networking for their yearly Values Based Academic Leadership Institute. Dr. Oates and Dr. Shachter have a large list of potential clients she knows from various parts of her life. The first step was to consolidate these emails into a single list on excel. Names were gathered from pieces of paper, emails and various other formats and reduced down to a single excel file. The details the name, institution and email of the potential clients, as well as an entry to group the individuals. Additionally, the file has room for the three dates that we have or plan to email the participants. This strategy should be helpful for organizing the contacts.

In addition to the new associate announcement, a trifold was crafted to promote S4HE. This trifold was for handing out in person so that if the team members or associates would have a physical printout to help promote the institute. The trifold is designed to advertise institutes in general, and not any one in particular. This trifold can be found in Appendix C. The trifold can easily be sent through traditional mail, and the PDF can be sent by email, but it is most visually appealing when printed out.

To advertise the Institute at Roosevelt University, a trifold for the institute was created. This trifold was created from a model in Hawaii but much of the information was changed. The trifold introduced the team and detailed the schedule for the two day institute. Starting with a large image of the Chicago skyline and yellow text box, the front cover of the trifold catches the eye easily. The text also features the company logo, website address, institute date and location. The first page explains the general philosophy of S4HE as well as all of the perks included for attending, including complimentary meals and networking events. The following three pages include more information about the company and institute, as well as details about each morning and afternoon lesson for both days. The final page highlights the different partnerships and finally calls the reader to register, and again includes the website address.

This trifold can be found in Appendix E.

To promote S4HE’s Institute held on October 18-19, emails were found for academic leaders at nearby Chicago academic institutions. Additionally, S4HE purchased a list from ACE at the cost of \$2500. The list contained 4323 from higher educational leaders from across the United States. This list was narrowed to just people from the list within 150 miles, which is usually

about a three hour drive. The email address for as many of the leaders were then found. The search was expanded to leaders from institutions on the list, but not personally named. The focus was mainly on presidents, provosts and deans, and especially those in professional development roles. An email meant to advertise the institute and direct leaders to the website was then prepared. An example of this email can be found in Appendix F.

## Chapter 4. Results

### 4.1 Interview Results

The interview consisted of a few basic questions about S4HE.

#### 1. Why did you join S4HE?

Dr. Shachter:	I started S4HE to contribute to the academic community and begin a plan towards retirement.
Dr. Oates:	My goal was to provide expertise from my academic experience and to set up a business to fulfil my academic interest while moving towards retirement.

#### 2. What are S4HE's greatest strengths?

Dr Shachter:	The years and diversity of experience of the partnership and associates.
Dr. Oates:	We work like no other (firm) on institutional values and professional development needs.

#### 3. What do you add to S4HE?

Dr Shachter:	Years of experience in multiple administrative positions.
Dr. Oates:	I add years of experience from multiple positions at large and small, public and private institutions and the federal government.

#### 4. Can you tell me any stories about getting clients and promotion?

Dr Shachter:	Serendipity and connections mostly.
Dr. Oates:	I have learned that having a strong network is critical. Our first few clients were all individuals we knew and have work intermittently and informally with in the past.

#### 5. How is S4HE different?

Dr Shachter:	Based on experience not rhetoric.
Dr. Oates:	We stick with our clients not only during our consultation on site but our follow- up and attention to their particular needs as well as helping them through difficult problems is a value added dimension we can provide.

#### 6. What are your hopes for S4HE's future?

Dr Shachter:	To grow to a starting base of business in the next five years.
Dr. Oates:	I hope that within 2 years we have 10 paying repeating customers that keep the partners busy at least one a month. Our gross should be around 100K by then.

## 4.2 Website Analysis

Table 2. Displays the results of the website analysis. Each of the five websites were ranked on criteria and then given a total score at the bottom. It should be noted that the weights of these different factors vary from customer to customer and these scores are an approximation of what some potential clients might think of the website as a whole.

	<b>Academic Impressions</b>	<b>Huron Group</b>	<b>The Kneeling Association</b>	<b>Dendros Group</b>	<b>S4HE</b>
Flow	5	4	4	5	4
Visual Appeal	4	4	4	4	3
Product Description	4	4	4	4	4
Expertise Noted	3	4	4	5	4
Testimonials	4	3	3	4	5
Mission Statement	4	3	3	4	4
<b>Total Score</b>	<b>24</b>	<b>22</b>	<b>22</b>	<b>25</b>	<b>24</b>

Table 2. Analysis of Websites by Criteria

For visual appeal on the website analysis, S4HE did not score particularly high, although the testimonials were notably good. Moving forwards, the flow of their website could be increased by constantly tying each aspect of the website to the mission statement.

## 4.3 Institute Participation

Emails were sent by the S4HE team to all of their networks and a list of potential new clients from the ACE list. 100 emails were sent to potential new clients on the ACE list. Samples of the new list, sample email and can be found in Appendix D and F respectively. To promote S4HE and its upcoming institute to their existing network, a few different announcements were created. There were fourteen attendees at the Roosevelt Institute, seven new clients and seven existing clients. The graph below details a basic demographic analysis of the institute participants.

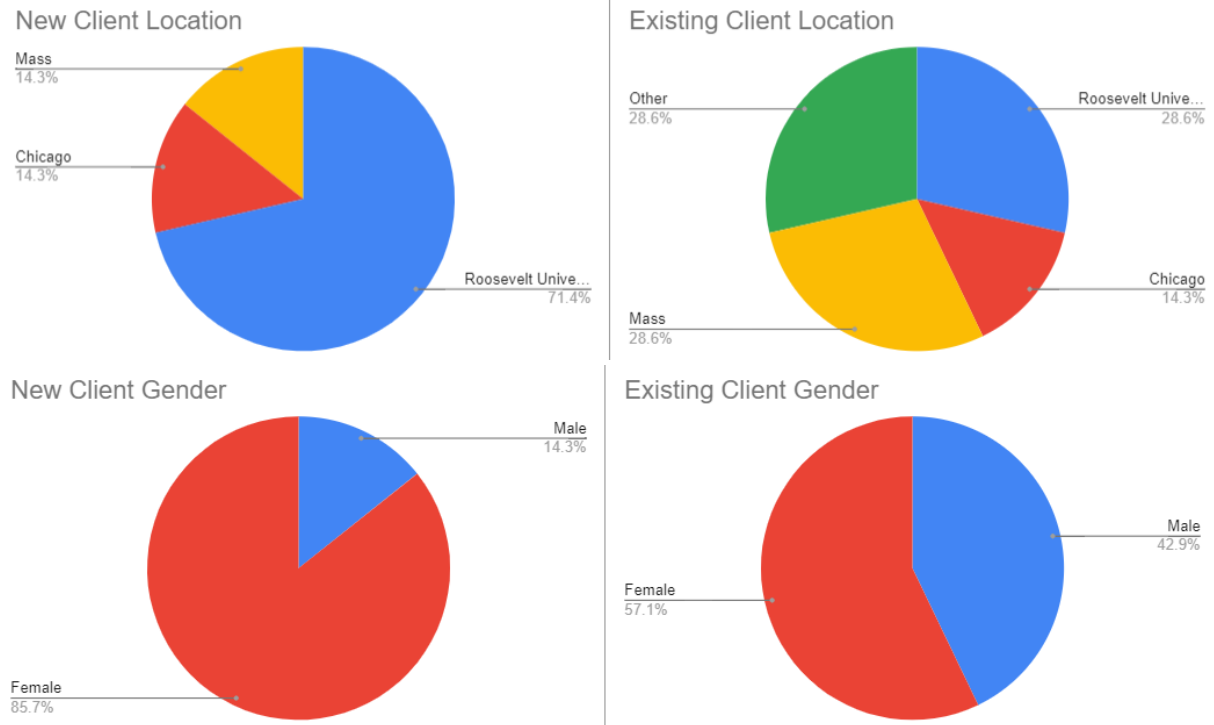


Figure 2 – Attendance Results

## **Chapter 5. Discussion & Recommendations**

### **5.1 Interview Results and Discussion**

In the interview with S4HE partner Dr. Shachter and Dr. Karen Oates, the questions allowed them to reflect on the mission of S4HE. Dr. Shachter expressed her vision for S4HE. First and foremost, S4HE needs to help fund retirement. The notable themes in her answers were experience and serendipity. Dr Shachter seems to rely on her excellent reputation to pave her way moving forwards. Based on her answers, S4HE's product and promotion are driven by their reputation. The partnership then reaches out to its network to sell the institutes.

Dr. Oates hopes that within the next two years, the partnership can get 10 monthly customers to help fill one institute a month. She believes that S4HE's strength is in its network. By following up with customers after institutes, S4HE bundles a network connection into their institutes. Their professional development focuses on the individual and helps broaden their network as well as deliver a better product. Similarly, customers are generated mainly through the personal networks of the partners and the continuously expanding network of S4HE.

### **5.2 Institute Participation**

The fourteen attendees were divided into two categories, "new participants" and "repeat participants." "New participants" refers to attendees who were not previously part of S4HE's network and were brought in from a new institution or network outside of S4HE. "Repeat participants" refers to clients who have been sent from well-known clients, usually from the same institution.

The number of new participants is 50% (7) of the number of attendees. Of the fourteen attendees, ten were women and seven of the fourteen attendees were from Roosevelt University. Most of the participants were deans, professors as title. More importantly most of the attendees were connected to institutes in more than one way. Many of the attendees were board or committee members who were involved in education beyond just teaching. Developmental roles such as director of partnership and Senior Vice President for Academic Affairs were also common. Moving forwards, this demographic information should be considered. A web page article from the University of Wisconsin-Madison breaks lists a number of demographic factors which can be critical to customer generation and retention (Downtown and Business District Market Analysis, 2011). While many of these factors can be very indicative, measuring each factor can be very difficult. The critical, measurable factors which were analyzed are gender, location and occupation.

The new attendants for S4HE were overwhelmingly female, but amongst repeat clients there is less of a disproportion. New clients were also overwhelmingly from the area, more specifically Roosevelt University, the host institution. Repeat attendees were from the Northeastern United States. The most consistent aspect of the attendees, both repeat and new is their occupation. While each title was different, all of the attendees were higher academic leaders who managed within the school. Additionally, the attendees tended to be chair and board members.

### **5.3 Email List**

While some of the entries were incomplete, the centralized list contains a list of 264 email address. The list was expanded by leveraging associates and leaders in the Chicago area. A sample of this list can be found in Appendix D: Email List Sample.

S4HE has promoted mainly through personal networks and relationships developed throughout their career. S4HE's new associates, Dr. Jay Labov and Dr. Ellen Goldey are key to promoting S4HE's institutes. These new associates offer more networks and relationships to expand the current strategy. To best capitalize on these new networks, S4HE must fully integrate the new associates into their brand. A new associate email announcement was developed to promote the firm. This email can be found in Appendix B. Because the nature of promotion through networks and relationships are personal, the most helpful course of action for the rest of the S4HE team is to determine how these associates fit into S4HE and clearly display it on a website.

Moving forwards, S4HE should focus on adding as many people to their email list as possible and using their network to expand to new schools. Because of the high number of new clients were from the Roosevelt University, S4HE should focus on moving their institutes around and bring themselves deeper into their current network. Many of the existing clients come from all across the East Coast which suggests that new clients from Roosevelt might be willing to travel to new institutes.

### **5.4 Website Recommendations**

Their new associates have shifted the brand which will be demonstrated with the new website updates. Beyond just adding information of the new associates, the website updates should improve the continuity between the mission statements, career accomplishments and offered services which S4HE displays on their website. Even the pictures of associates and institutes should be combined around a centralized mission statement. Because S4HE's greatest assets are its partner's accomplishments, anecdotes from their careers could be used to demonstrate the effectiveness of their program. Additionally, S4HE's brand should consider the future of the company as they change. As just a two year old firm, the aspired future of S4HE could be totally different and understanding the available options and preferences of the partners and associates could be critical to how S4HE brands itself in the future. This branding usually takes the form of a new website.

Most of the consulting websites analyzed above had so much material that their specific expertise was difficult to identify amongst the grandiose terminology, and as a result appeared to be "just another consulting firm" to a casual observer. Higher education consulting is dominated by academic leaders with successful careers: while S4HE team members' accomplishments are at least equally noteworthy, they are nothing new in the competitive market of Higher Education. The team member's accomplishments speak for themselves; the website will put universally relatable aspects of Values-Based Academic Leadership on a pedestal, and only then validate these principles with the success of the team.

To improve upon the visual aspect of the website, photos from the institutes should be displayed instead of the stock photos found on the internet. The theme of these images should

reflect the mission statement of the website and include a fun aspect to project a fun atmosphere to potential participants. The noted experiences could be better explained as well. Beyond explaining the services, S4HE could include stories of project which they have worked on to detail exactly how they operate. In addition to their own story, S4HE should then back these services up with testimonials that are specific to the skill being viewed on the website. Lastly the mission statement should be specific enough to define S4HE in their particular part of the consulting industry. The mission statement should essentially be their noted expertise in one or two sentences. Starting with a good mission statement, and then tying the products, photos and testimonials to that mission statement will give the website a natural and inviting flow which displays the information relevant to the viewer based upon what they click.

To give the website better flow, start with a simple mission statement, introduces the associates and then sells the institutes. This will articulate the strengths of the firm more vigorously. Each aspect of the website, from biographies to sales pitch should serve as an example of how S4HE operates by this mission. This emphasis on a mission statement positions S4HE specifically as Values-Based Academic Leaders advertises a specific but versatile product. The list of services could serve as just some of the examples of how Values-Based Academic Leadership can help institute attendees. By referencing their list of services as examples, S4HE opens to door for unstated possibilities. After introducing the scope of services, S4HE should use specific client testimonials to demonstrate example services and prove S4HE's effectiveness. Lastly, the homepage will call the reader to action. The most obvious action the website could seek to inspire is to get the reader to register for an institute. Because attendees must find funding and likely have other questions about the institute before signing up, the call to action will also encourage the reader to take up S4HE's mission statement with leaders and peers at their school.

On their scope of services graphics, mentoring, career development and creating opportunities for employees could be simplified the principle of helping your peers. People intrinsically understand the importance of helping those around them and boiling these concepts down to their "bare bones" before specifying the implementation in higher education leadership help people understand that they have been striving to learn what S4HE offers their entire lives. In the spirit of simplicity, the website specify each concept in groups of three ideally. Each aspect of the website should build off very simple concepts which constantly relate back to the mission statement. Most importantly, the website should have a linear flow which gets continuously more specific without repeating itself. In addition to the biographies on the website, the mission statement should be promptly followed by anecdotes demonstrating each team member's use of simple concepts to help the reader understand the application of humanitarian principles in academic leadership.

On a more topical note, the website could use less stock photos and focus more on pictures which emphasize simple principles, like holding the door for somebody, laughing together as a team or carefully listening to somebody talking. Most importantly, each photo should exemplify the basic concepts promoted on the home page.



From a financial aspect, the website could also direct the user to a Patron. Patreon is a great way of monetizing intellectual value. The website allows sponsored clients to give different levels of access to files and different levels of recognition to other Patreon users based on their contributions. Patreon is usually used by people who create videos, essays or podcasts. While they do charge some money for the services, most of the revenue goes directly to the sponsor. As stated in Dr. Wilson and Dr. Wendy in their paper *A Little Bit of Money Goes a Long Way: Crowd funding on Patreon by YouTube Sailing Channels*, “personal networks and underlying project quality are associated with success” (Wilson & Wendy, 2019) These two critical factors are shared by S4HE and many small firms on Patreon trying to monetize human capital. Additionally, larger consulting firms in the industry have their own library for purchase, much like Patreon.

### **5.5 Concluding Recommendations**

1. Add additional short bio on the website which aligns with a mission statement
2. Focus on large new clients in addition to reaching out to current network.
3. Hold institutes in as many different areas as possible
4. Explore funding sources for customers such as tax refunds, grants available budgets
5. Consider additional revenue streams like Patreon

To give the website better flow, a mission statement should be followed by short bios and pictures of the partners. The website can then continue to explain the services offered and then include links for a closer look at any specific services. Consistent references directly back to a specific mission statement could position S4HE perfectly for new opportunities. Being specific is critical to acquiring new customers because the consulting industry is a competitive business. S4HE could specify which kinds of institutions, which kinds of problems and locations to target potential new clients.

To increase attendance at the institutes, S4HE could focus on large clients with whom S4HE might have a foot in the door, like Quinsigamond Community College. These clients alone could easily have their own institutes where the topics could be school-specific. While the current network proved invaluable, using the current network to expand is critical to long term success.

Institute attendees who were already part of the S4HE network appear to be willing to traveled as much as 1000 miles to attend the institute hosted by Roosevelt University. Most of the attendees who were new to the S4HE network were from Roosevelt University. By having institutes in as many different areas as possible, S4HE has potential to spread their brand with each new institute.

To sell institutes more easily, S4HE could also explore the funding behind their institutes. Identifying available budgets or grants could be critical to selling the institutes. Additionally, any tax refunds should be understood by the team to keep the cost down for the customer. If S4HE can help their network pay for the institutes, their network will be able to promote S4HE institutes more easily.

Lastly, S4HE could consider additional revenue streams like Patreon etc. The institutes are difficult to organize beyond selling the tickets and cost money. An online income stream is both common for many larger consulting companies and useful in that it is consistent revenue. Videos

of one on one interviews discussing important academic topics could be sold on a monthly or yearly basis to generate guaranteed revenue. The videos could be of different parts of the institute and recording them could be very little additional work.

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## Appendix A: Interview Questions & Consent Script

Semi-structured interviews were used to learn more about the different members of the S4HE team, and how they shape S4HE. This information is critical to understanding the firm's brand. Semi-structured interview were the research method chosen to learn which points each of the team members chooses to focus. The information is stored on my computer. Verbal consent from the participant will be acquired before sharing either the original recording or products of that recording.

Survey Questions:

- Why did you join S4HE?
- What are S4HE's greatest strengths?
- What do you add to S4HE?
- Can you tell me any stories about getting clients and promotion?
- How is S4HE different?
- What are your hopes for S4HE's future?

## Appendix B: New Associate Announcement



Please join us in adding three talented and experienced consultants to your Higher Education consulting team. Each of our new associates brings expertise to a new area of the company and a unique set of experiences and networks.

Partner Amy Shachter and Karen Oates could not be happier to have such a talented, open, accessible team as they expand their business to non-profits and programs while further strengthening their consulting services, career and talent management and their nationally known Value-Based Academic Leadership Institutes.

Please

join us in welcoming Jay, David and Ellen.

Read their short bios by clicking on the pictures:



Thanks and have a great day!

S4HE

[www.S4HE.com](http://www.S4HE.com)

[info@s4he.com](mailto:info@s4he.com)

# Appendix C: Trifold Announcement

## Who We Are

S4HE offers a diverse team of consultants with a wide range of experience working in positions of leadership with educational, governmental, and private institutions. Within the realm of higher education specifically, our team has worked as faculty members, deans, directors, and provosts. Drawing on our vast pool of experience, our consultants deliver sustainable and lasting results. From leadership development to workplace culture and succession planning, we work with organizations to achieve success.



## Our Approach

S4HE works for you and with you. We start by spending time learning about your goals in the context of your institutional structure and culture. After we gain an understanding of your needs, we help you by designing an approach to meet your intended outcomes and expectations. Integral to our work is the promotion of ethical, collaborative, and inclusive decision making. S4HE works with you along the way to reach success.



*"With the challenges we face in higher education today, colleges and universities need experienced and dedicated partners to move the institution forward. I can always turn to S4HE and their associates to provide the direction and implementation for new program developments and assessment and evaluation, while creating a culture of cooperation and inclusion. The S4HE team will not disappoint you!"*

**-Mel Schiavelli**  
Executive Vice President  
Northern Virginia Community College

**Contact Us**  
**General Inquiries**  
info@S4HE.com  
[www.s4he.com](http://www.s4he.com)

**Founding Partners**  
Karen Oates  
koates@s4he.com  
Amy Shachter  
ashachter@s4he.com



**Success for  
Higher  
Education**

*Guided by values; Inspiring your success*



## Scope of Services

S4HE offers a variety of consulting, coaching, and workshop services tailored to your specific needs. Comprehensive services range from creating strategies for leadership development to creating a culture of innovation.



## Workshops

In support of our services, we also offer focused workshops on a variety of topics, including:

- Staying in Touch with Faculty & Staff
- Building Trust
- Building an Administrative Team
- Managing Change – Culture & Process
- Puzzles: Creative Problem-Solving
- Create a Community of Transformation
- Creating Collaborative Environments
- Building Civic Engagement
- Group Dynamics & Power Structures
- Work-Life Planning & Balance
- Keeping Your Career on Track
- Strategies for Promotion
- The Latest Active Learning Pedagogies
- Leveraging Your Strengths
- Navigating Solicitations from the Federal Government
- How to Create Partnerships for Joint Proposals
- Mentoring & Critiquing Proposal Development
- Mastering the Art of Leading Change
- Leading During Times of Crisis
- Planning for Succession
- Building Leadership from Within
- Diversity Recruitment & Retention
- Leveraging Faculty Strengths
- Strategies to Successfully Manage Up



## Appendix D: Email List Sample

Name	Institute	Email	List	1st Contact	2nd Contact	3rd Contact
Ann Bresingham	Robert Morris University	abresingham@robertmorris.edu	Chicago Cold Leads			
Alanka Brown,	City Colleges of Chicago--Wilbur	abrown601@ccc.edu	Chicago Cold Leads			
Amy Eldridge	Institute for Clinical Social Work,	aeldridge@icsw.edu	Chicago Cold Leads			
Christine J. Sobek	Waubensee Community College	ageist@waubensee.edu	Chicago Cold Leads			
Bryan D Albrecht	Gateway Technical College	aguirred@gtc.edu	Chicago Cold Leads			
Anne Panomitros	City Colleges of Chicago--Richard	apanomitros@ccc.edu	Chicago Cold Leads			
Arvid C. Johnson	University of Saint Francis	arvid@stfrancis.edu	Chicago Cold Leads			
Beth Young	Rock Valley College	b.young@rockvalleycollege.edu	Chicago Cold Leads			
Bruno Bondavalli	Saint Augustine College	bbondavalli@staugustine.edu	Chicago Cold Leads			
Barbara Wilson	University of Illinois at Urbana-	bjwilson@illinois.edu	Chicago Cold Leads			
Basim Khartabil	Robert Morris University	bkhartabil@robertmorris.edu	Chicago Cold Leads			
Jeffrey James	Illinois School of Health Careers	brownjr@illinois.edu	Chicago Cold Leads			
Dr. Carleta Aikens-	City Colleges of Chicago--Malcolm	calston@ccc.edu	Chicago Cold Leads			
Carl E Balsam	North Park University	cbalsam@northpark.edu	Chicago Cold Leads			
Charles Chang, MA	Erikson Institute	Cchang@Erikson.edu	Chicago Cold Leads			



# Appendix E: Chicago Trifold

## Philosophy

We invite you to join us for our annual Values-Based Academic Leadership Institute. Together we explore critical issues in academic leadership through skill development as well as developing the foundations that drive value based leaders. Our goal is to help you create an environment that maximizes the skills of your community fosters your success.

**Program Dates:**  
October 17 and 18, 2019

**Price: \$600**

### Registration includes:

- Admission to all educational sessions
- All related session materials and inventories
- Lunch and networking reception on Friday, October 17th
- Breakfast and lunch on Saturday, October 18th

### Location Host:

Roosevelt University  
Chicago, Illinois

### Contact persons:

Karen Oates - [koates@s4he.com](mailto:koates@s4he.com)  
Amy Shachter - [ashachter@s4he.com](mailto:ashachter@s4he.com)

Professional leaders from all aspects of the academic community are encouraged to develop their deeper understanding of Values-Based Leadership.

## About the Institute

Institute participants explore the practices of a value driven leaders, focusing on leadership that produces community transformation by creating an environment of honesty, truth, and trust. Whereas other academic leadership development programs in higher education focus primarily on building management skills and acumen for the purpose of career advancement, the Values-Based Academic Leadership Institute does much more. We take a holistic approach to all levels of academic leadership by grounding theory, practice, and institutional mission in personal and professional values to foster authentic, successful leadership.



*Guided By Values: Inspiring Your Success*

## Presented By:



## In Partnership With:



## Register Today!

[www.S4HE.com](http://www.S4HE.com)



## Values-Based Academic Leadership Institute

October 17 and 18, 2019  
A Success 4 Higher Education Leadership Institute

Hosted by  
Roosevelt University  
Chicago, IL



[www.s4he.com](http://www.s4he.com)

*Guided By Values: Inspiring Your Success*

## Institute Schedule

### Morning Session Workshop 1: Values-Based Academic Leader (VBAL)

In our opening session, we explore: What does it mean to be a VBAL; what are the characteristics and motivations of a VBAL, and how do VBAL differ from other leadership styles in the academy? Each participant completes a values inventory as a reference for subsequent decision making and career explorations.

### Afternoon Session Workshop 2: Your Leadership Characteristics and Values

We explore the elements of a successful and fulfilling career with reference to your values inventory. Passion, purpose and fulfillment as the goal we want not only for ourselves but those around us. We focus on the balance between doing and accomplishing your academic goal without losing yourself. We begin exploring the strategies for VBAL to lead change while keeping your values before you as you prepare for hard decisions and conversations with others.

### Morning Session Workshop 3: Effective Strategies & Tools

Human communication, connecting to the needs of one's constituents, and understanding what motivates people are key leadership elements. In this session, we provide both an understanding of and strategy for dealing with difficult individuals and challenging situation. We provide participants a series of case studies for group discussion.

### Afternoon Session Workshop 4: Next Steps for You as a Values-Based Academic Leader

We will discuss strategies to build your leadership team and working with external communities. Advisory boards, boards of advisors, and other external friends are immeasurable assets to the institution and your work. We explore how best you can leverage resources, both financial and human. We return to our values inventory as we prepare for our next leadership challenge. Participants are invited to reconnect with the workshop facilitators' institution over the next 6 months.

## Who We Are

Success 4 Higher Education (S4HE) offers consulting expertise in a wide range of academic areas. We provide you and your institution with a personalized approach to solving your professional development needs, from customized workshops to strategic planning, leadership development, and coaching. To see a detailed description of our services, visit [www.s4he.com](http://www.s4he.com).



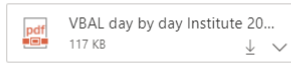
National Institute for Science & Civic Engagement (NISCE) is partnering with S4HE to present this Institute. NISCE is a national organization of over 2000 faculty and administrators who have created and lead a global Community of Transformation for engaged teaching and learning.

The NISCE's programs provide leadership opportunities for individuals and professional development support for academic institutions. To learn more, visit [www.ncsce.net](http://www.ncsce.net).

# Appendix F: Sample Chicago Email



Oates, Karen K



Good Afternoon Colleagues

*And my sincere apologies for any duplicate emails.*

Just a quick note to about the Academic Leadership Institute – we are just putting the finishing touches on the schedule and are hopeful for participation from you or those you are mentoring! Please take a look at the schedule attached.

Please consider sending members of your community to the annual Academic Leadership Institute and/or consider an onsite workshop for leaders at all rank and academic position.

We could not be happier to have Roosevelt University, Chicago host our 2019 annual Values-Based Academic Leadership Institute.

*Success 4 Higher is a corporate sponsor of American Council on Education (ACE). The VBAL Institute is designed for faculty leaders of all ranks, department chairs, program director and deans as well as our student affair professionals. Using an interactive, case study approach, a range of topics will be discussed such as leading vs. managing, leading change, preparing for challenging conversations, working with difficult people, and exploring faculty roles and institutional commitments in the new academy.*

During times of transition a focus on mentoring the talent you have and the people who make your institution great becomes even more important than ever. Leading change is skill and a team sport! Please consider sending members of your community to the annual Academic Leadership Institute and/or consider an onsite workshop for emerging leaders.

We have attached the trifold outlining the Academic Leadership Institute specifically designed for your associate deans and department chairs/ associate chairs and program directors

Attached is the outlining the Academic Leadership Institute and the daily schedule. To register please go to: [www.s4he.com](http://www.s4he.com)

If you have questions, just email!

Best regards,  
Karen

**Save the date: October 18-19, 2019 at Roosevelt University in Chicago**  
**S4HE Values-Based Academic Leadership Institute**  
**A two-day intensive program to develop and ground you as an authentic academic leader.**  
**[www.s4he.com](http://www.s4he.com)**



## Appendix G: IRB Waiver

### WORCESTER POLYTECHNIC INSTITUTE

100 INSTITUTE ROAD, WORCESTER MA 01609 USA

#### **Institutional Review Board**

FWA #00015024 - HHS #00007374

#### **Notification of IRB Approval**

**Date:** 03-Jun-2019

**PI:** Oates, Karen K

**Protocol Number:** IRB-19-0682

**Protocol Title:** S4HE Interviews

**Approved Study Personnel:** Terwilliger, Joseph~Oates, Karen K~

**Effective Date:** 03-Jun-2019

**Exemption Category:** 2

**Sponsor\*:**

The WPI Institutional Review Board (IRB) has reviewed the materials submitted with regard to the above-mentioned protocol. We have determined that this research is exempt from further IRB review under 45 CFR § 46.104 (d). For a detailed description of the categories of exempt research, please refer to the [IRB website](#).

The study is approved indefinitely unless terminated sooner (in writing) by yourself or the WPI IRB. Amendments or changes to the research that might alter this specific approval must be submitted to the WPI IRB for review and may require a full IRB application in order for the research to continue. You are also required to report any adverse events with regard to your study subjects or their data.

Changes to the research which might affect its exempt status must be submitted to the WPI IRB for review and approval before such changes are put into practice. A full IRB application may be required in order for the research to continue.

Please contact the IRB at [irb@wpi.edu](mailto:irb@wpi.edu) if you have any questions.

\*if blank, the IRB has not reviewed any funding proposal for this protocol



# Appendix H: Interview Response



Amy Shachter [redacted]  
Tue 10/22/2019 11:24 AM  
Terwilliger, Joseph D. [redacted]



Why did you join S4HE? - I started to contribute to the academic community and begin a plan towards retirement

- What are S4HE's greatest strengths? - The years and diversity of experience of the partners and associates.
- What do you add to S4HE? Years of experience in multiple administrative positions.
- Can you tell me any stories about getting clients and promotion? Serendipity and connections mostly.
- How is S4HE different? Based on experience not rhetoric
- What are your hopes for S4HE's future? To grow to a starting base of business in next 5 years.

Amy Shachter, Ph.D. / Senior Associate Provost for Research and Faculty Affairs / Santa Clara University / 500 El Camino Real / Santa Clara, CA 95053 [redacted]

From: Terwilliger, Joseph D. <jdterwilliger@wpi.edu>  
Sent: Wednesday, November 20, 2019 9:27 AM  
To: Dates, Karen K <koates@wpi.edu>  
Subject: IQP Questions

1. Why did you start S4HE?

My goal was to provide expertise from my academic experience and to set up a business to fulfil my academic interest while moving towards retirement.

2. What do you add to S4HE?

I add years of experience from multiple positions at large and small, public and private institutions and the federal government.

3. Can you tell me any stories about getting clients and promotion?

I have learned that having a strong network is critical. Our first few clients were all individuals we knew and have worked intermittently and informally with in the past.

4. How is S4HE different?

We stick with our clients not only during our consultation on site but our follow-up and attention to their particular needs as well as helping them through difficult problems is a value added dimension we can provide.

5. What are your hopes for S4HE's future?

I hope that within 2 years we have 10 paying repeating customers that keep the partners busy at least one a month. Our gross should be around 100K by then.

Thanks  
Joe Terwilliger