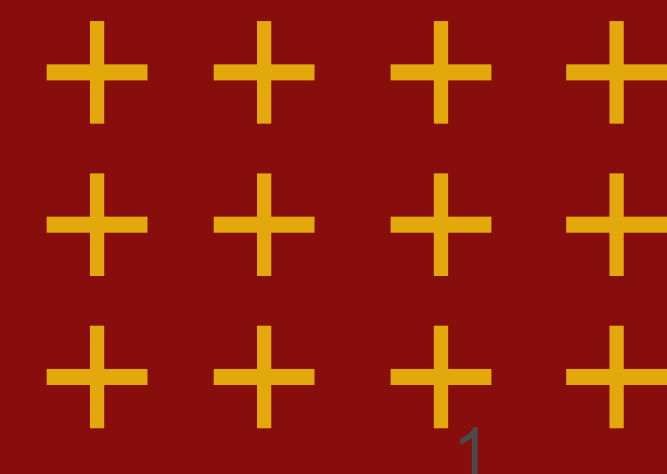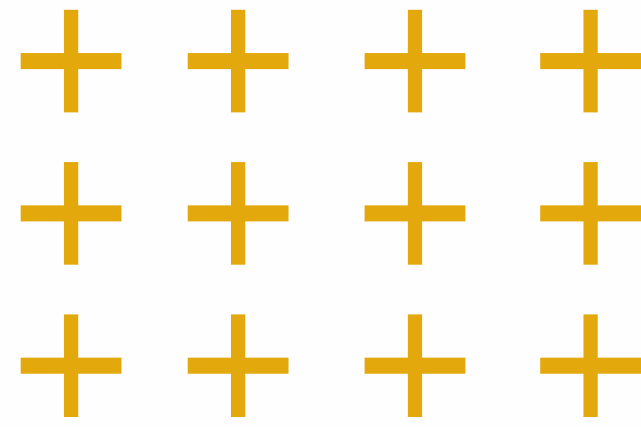# All-staff Resource Guide

CARNEGIE

We're thrilled you're here. Our work is only as good as our people and we believe we have the very best.
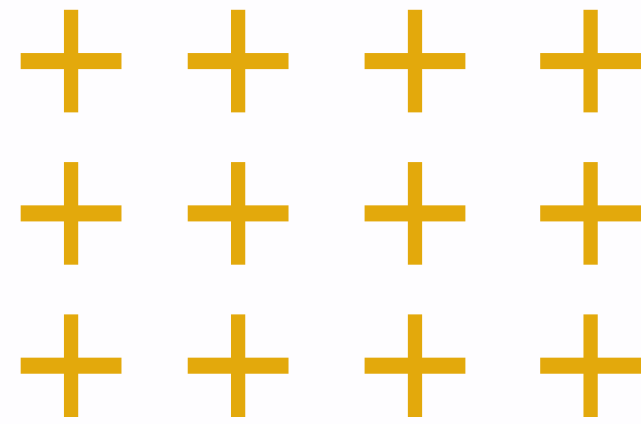
table of contents

1

About Carnegie

our mission

To create powerful connections between students and colleges through marketing and enrollment innovation.

our vision

To become the most transformative integrated marketing and enrollment solution in higher education.

core values

1 **collaboration** —*working together to be incredible partners to each other and clients*

2 **innovation** —*constantly making something new and better*

3 **client success** —*caring about clients on a professional and personal level*

4 **continuous improvement** —*possessing a spirit of excellence and progress*

5 **people first** —*believing that human connection is what makes life meaningful*

human connection

sets us apart

core competencies

brand strategy

digital marketing

enrollment strategy

integrated research

lead generation

student search

marketing strategy

slate optimization

signature creative

personality assessments

web development

financial aid optimization

See the **2022 Media Kit** for more information.

differentiators

+ HIGHER EDUCATION

Carnegie focuses entirely on higher education and has since 1985, making it a well-known brand in the industry and a forward-thinking leader in our market.

+ HUMAN CONNECTION

We connect colleges with students through the power of human connection. We believe that genuine connection is the key to capturing attention and building affinity. We measure and then market to a student's unique behaviors and motivators to create deep connections and real conversations.

+ CUSTOM SOLUTIONS

Carnegie builds custom solutions with best-in-every-class services that generate student connection. Our approach is data driven, personified, targeted, and customized to solve our clients' unique enrollment needs and challenges.

+ INTEGRATED SERVICES

We deliver what others simply cannot because we have what others do not: original intellectual property, powerful data, precision tools, and decades of market leadership experience.

brand personality

We use an archetype-based model to understand the DNA of a brand and clarify its story. In our model, nine core archetypes represent distinctive, universally recognized facets of human personality. Carnegie's brand persona is below:

collaborative innovator

Brilliant and forward-thinking,
driven by inventing the future through innovation. Delivers advancement, ingenuity, and radical outcomes. Values newness, experimentation, and progress. Causes people to feel awe and amazement.

accomplished frontrunner

Powerful and assertive,
driven by growth and being a frontrunner. Delivers stability, pride, and strength. Values power influence, and accomplishment. Causes people to feel confident and in control.
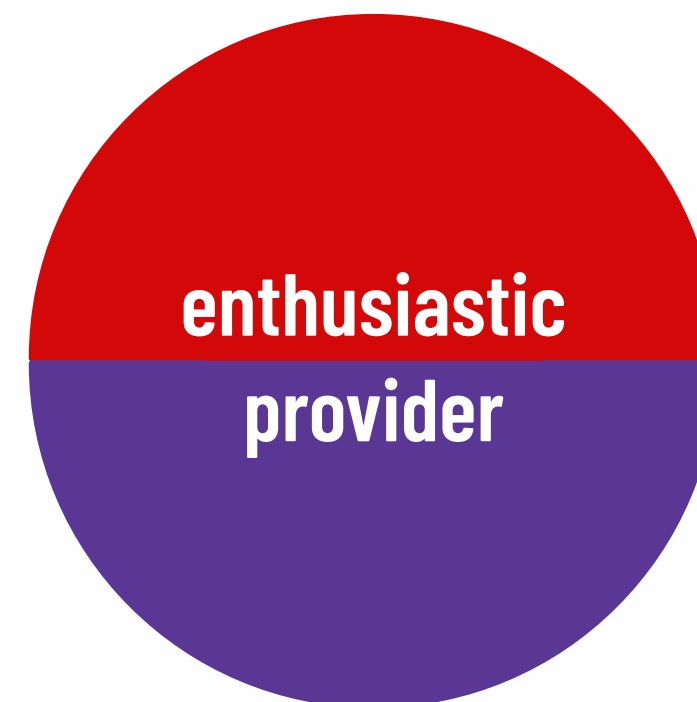
enthusiastic provider

Supportive and selfless,
driven by compassion, warmth, and the desire to care for others. Delivers nurturing, comfort, and protection. Values altruism, commitment, and generosity. Causes people to feel valued and supported.

SILVER
rebel
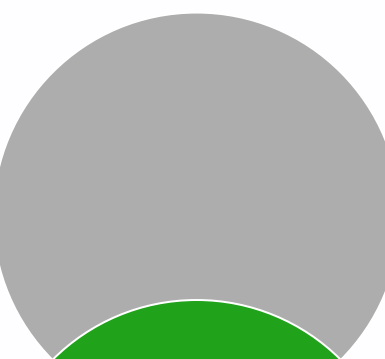
GREEN
explorer
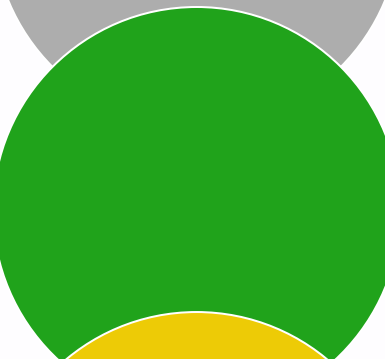
YELLOW
innovator
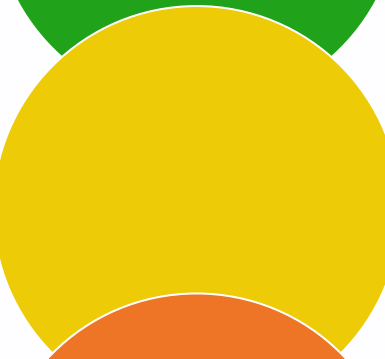
ORANGE
creator
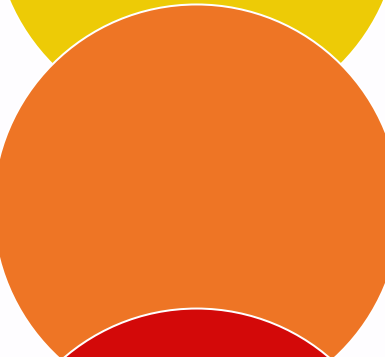
RED
entertainer
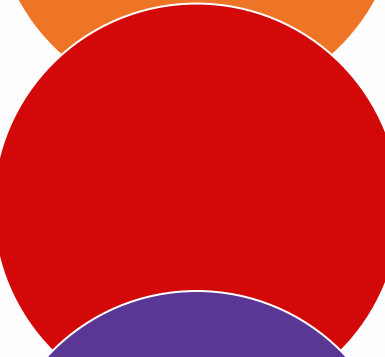
PURPLE
supporter
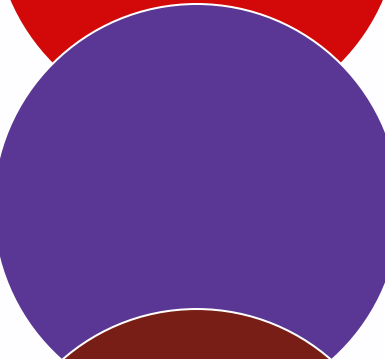
MAROON
competitor
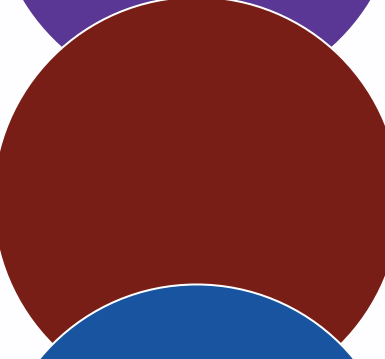
BLUE
achiever
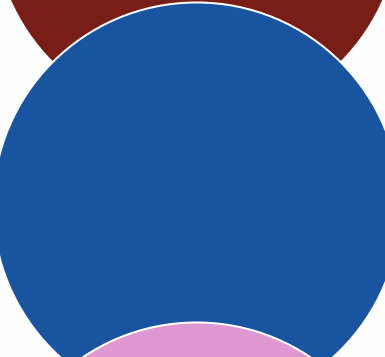
PINK
sophisticate
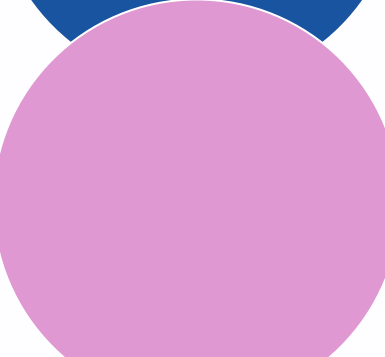
strategic goals

1 **MANAGED ORGANIC GROWTH**
Achieve managed divisional growth of 15-20% across the company.

2 **SOLUTION INTEGRATION**
Invest and focus on product integrations to deliver differentiated solutions to clients.

3 **SEGMENT EXPANSION**
Harness acquisitions, partnerships, and organic service expansion into other segments in higher education.

4 **EMPLOYER OF CHOICE**
Be the employer of choice, everyday, for every employee.

5 **PRODUCT INNOVATION**
Maintain and advance our leadership in higher education through continuous improvement and innovation.

6 **CLIENT SUCCESS**
Provide a best-in-class and seamless client experience

org structure

+ See our organizational chart using **Insperity OrgPlus**.

executive leadership

[portfolio-owning divisions]

information technology

finance

human resources

collegeXpress

digital marketing

slate optimization

student search

operations

bus dev + marketing

client success

research, modeling, strategy

creative

web

CLARUS

[business and client support divisions]

13
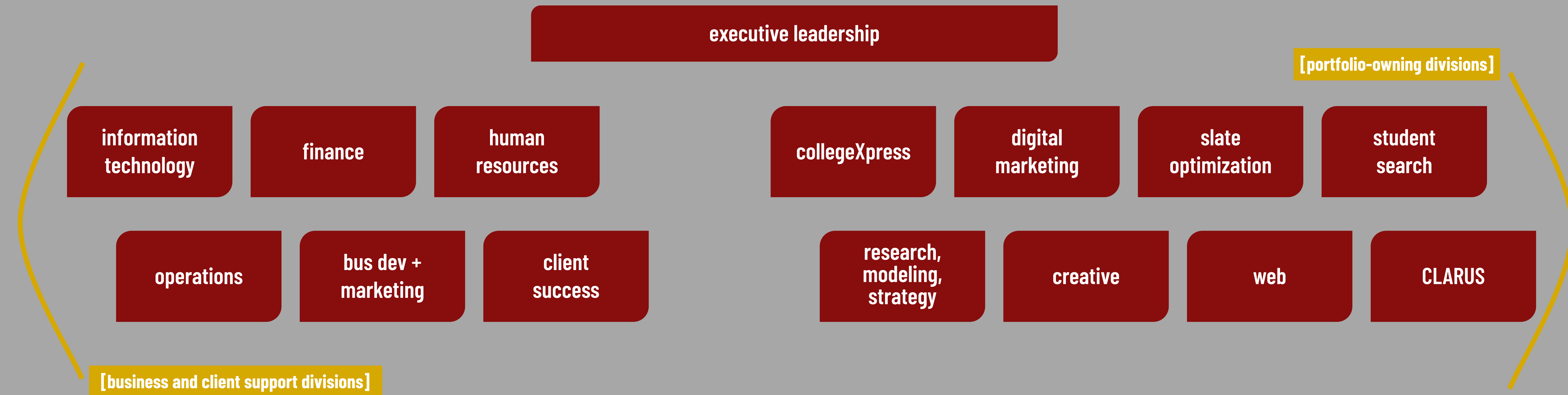
company history

For more than 30 years, Carnegie has been a leader and innovator in higher education marketing and enrollment strategy. We connect colleges with students through the power of human connection and believe that genuine connection is the key to capturing attention and building affinity.

Over the last decade, our capabilities in this space have been expanded and strengthened through the mergers and acquisitions of Dartlet, Underscore, mStoner, Maguire Associates, CLARUS Corporation, and Fire Engine RED.

A list of Carnegie-specific acronyms can be found here.

2001
Carnegie Communications sells its print magazine business to Alloy, Inc. (ALOY) a publicly traded company.

2013
Joe Moore buys Carnegie back from Alloy.

2018
Carnegie and **Dartlet** officially merge in January 2018.

2021
Carnegie acquires **Underscore** in May 2021.

2022
Carnegie acquires **Maguire Associates** in July 2022.

2023
Carnegie acquires the **National Small College Enrollment Conference** in January 2023.

1985
Joe Moore joins his family's business, Carnegie Communications, a producer of a print magazine focused on connecting students with schools (Private Colleges & Universities).

2009
Under the ownership of Alloy, Carnegie becomes the first firm to offer digital marketing services focused on higher education.

2020
New Heritage invests in Carnegie Dartlet on Oct 1, 2020.

2021
Carnegie acquires **mStoner** in October 2021.

2023
Carnegie acquires **CLARUS Corporation** in March 2023.

Carnegie acquires **Fire Engine Red** in December 2023.

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New Hire Checklist

Aligning Expectations

Working for Carnegie

+ Working Hours + Remote Work

General business hours are Monday through Friday, from 8:30 a.m. to 5:30 p.m. local time each day.

At the start of employment, each employee and their manager will establish the employee's standard work schedule between 7:30 a.m. – 6:30 p.m., with core hours of 9:30 a.m. – 4:30 p.m., and a one-hour lunch break. *Please make sure you have updated their Google calendar settings to reflect those working hours.*

Employees must be accessible by phone, email, video, and instant message (ie. Slack) during the agreed-upon work schedule. All employees should be in a dedicated and secure work space with internet connection during working hours unless traveling for work.

+ Equipment

The following equipment is able to be provided by Carnegie:

- Computer
- Mouse
- Keyboard
- Monitor
- Headset

Stipends are not provided to individual employees for the purchase of internet, desk, desk chair, etc. If you questions about what equipment is provided, please contact your manager.

+ Dress Code

When meeting with clients (via Zoom or in person), attire should be smart casual, business casual, or business professional, depending on the scenario. Please confirm your manager if you are unsure what is appropriate.

For internal meetings with your Carnegie colleagues, casual, casual business, and smart casual is appropriate and what you'll see most commonly.

Please see Indeed's attire guide, with images and examples, if you need additional guidance.

One-on-One Meetings

Making the Most of Your Time

What is a one-on-one meeting and what is its purpose?

A one-on-one meeting is a designated time to connect with your manager. These are recurring meetings that offer you the opportunity to discuss whatever is on your mind—this could be time to catch up personally or professionally, or to seek support on specific issues.

Who schedules the meeting?

Your manager will create the calendar invitation for your one-on-one meetings, but you can request to adjust the timing as often as needed.

Who should create the agenda?

You should come to the meeting with the topics you'd like to discuss. Your manager may have items to add, but the priority is the your agenda.

One-on-One Agenda Template*

This format and list of recommended topics is meant to serve as a starting point. Ultimately, you should base your agenda topics off your own needs.

+ Check-In
  - Personal check-in
  - Highlight/Lowlight of the week
  - Status Updates
  - Revisit previously set goals

+ Priority Discussion
  - Top priorities this week
  - Set goals and strategies for achieving them

+ Development and Support
  - Request feedback
  - How can your manager support you in your current goals?

Week One Checklist

☑ **Complete I-9, W-4, and Direct Deposit** paperwork (as soon as possible and no later than three days from start date).

☑ **Complete your CarnegieChem Personality Assessment.**

☑ **Fill out your company bio and provide a headshot here.**

☑ **Create your Carnegie email signature** (see this slide).

☑ **Enable appropriate calendar viewing settings.** For ease of internal scheduling, please ensure that all other Carnegie employees can see your availability and event details:
- Navigate to Calendar Settings
- Choose "Settings for my calendars"
- Click on your name
- Scroll down to "Access permissions for events"
- Click the checkbox next to "Make available to Carnegie Dartlet" and then select "See all event details" from the drop-down menu

☑ In your General calendar settings, please **indicate your primary time zone, as well as your standard working hours**:
- General > Time zone
- General > Working hours & location

☑ **Accept all calendar access invitations** you've received via email. You should have invitations from central admin and your division-specific PTO and Travel calendars.

☑ **Sign** Employee Handbook Acknowledgement

☑ Add the **Carnegie - Training & Events** calendar to your visible calendars. Either accept the email invitation to add this calendar, or in your Google calendar:
- click on the "+" next to "Other Calendars"
- Select "Browse resources" from the drop-down list
- Expand the section called "Carnegie"
- Click the checkbox next to "Carnegie - Training & Events"

☑ Once you've added the calendar above, be sure to **duplicate the Weekly All-Company Call to your own calendar** (Wednesdays at 12pm EST).

☑ **Turn on your Google 2-Factor Authentication** (see this slide).

☑ **Accept all software invitations** you were sent via email and create your profiles, including photo, first and last name, title, division, phonetic spelling, and working hours, as applicable. (Be sure to check your spam folder for invitations just in case.)

☑ **If you're using Carnegie-provided health benefits, make your selections.** This needs to be complete within 30 days of your start date.

☑ **Complete** required HR Trainings sent to your email:
- Workplace Harassment Prevention
- Protecting Customer Information
- Protection of Company Information

3

Central Tools + Channels

Communication Tools

Slack

This is our instant messaging platform, used for collaborative work discussions, team announcements, direct messages, and just-for-funsies gifs and conversations.

Please see the **Slack Resource Guide** for all details.

Gmail

This is our email platform, accessed via browser or Outlook. Your login credentials for this and our VPN connection are the same. We operate most of our software platforms using a Single Sign-On (SSO) in which those same credentials are utilized. Select "Sign in through Google" on login pages when in doubt.

Please see the Google Suite Resource Guide.

Asana

This is our project management software, used by client-focused project teams and internal teams alike.

Please see the Asana Resource Guide for all details.

Zoom

This is our video conferencing software, used for all internal and external meetings.

Please see the Zoom Resource Guide.

Never take notes on a call again by utilizing Fathom, an AI notetaker for Zoom that allows you to record, transcribe and summarize meetings.

Communication Norms

Slack

Slack should be the primary method of daily communication for one-on-one conversations, casual/fun messages with coworkers, non-Asana-task related discussions, and team reminders. These messages disappear after a set amount of time so you should not put anything in Slack that you want a record of later. If you and other team members are having an informal task-related conversation in Slack, be sure to copy all relevant information and decisions in the appropriate Asana task. If you do not want notifications from general/fun threads, you can silence them by right-clicking and selecting "Mute Channel." Slack huddles can be used when you want to have a non-scheduled discussion with someone, after confirming they are available.

Gmail

Gmail is primarily used for official company correspondence, important updates, and requests for feedback and action items—anything we want a record of that is not in Asana. Likewise, if we want record of specific client communication, this should be sent via email. If a client is not responding well in Asana, email can be used to link to and remind them to respond in Asana. We want to be sure to keep email as minimal as possible, so we do not miss anything from a client or outside party.

Asana

Asana should be used as the primary method of communication for client projects. Many of our clients are also in Asana with access to client-facing projects. As a standard, always assign the Asana task to the person you are messaging and include a due date, in addition to tagging them (with the @ sign) in the comment section. That person will assign the task back to you when they reply.

Zoom

All scheduled meetings are facilitated via **Zoom**. Meeting invitations should be accompanied by a Zoom link and agenda. One-off unscheduled discussions can also occur via Zoom by confirming that others are available via Slack and sending them a Zoom link (these types of conversations can be conducted via Slack huddle or Zoom). If you have a Zoom phone account, please include that number in your email signature.

Conducting Meetings

+ Scheduling

Because we rely on our Google calendars to show availability and schedule meetings, it's very helpful for everyone if you're intentional about keeping yours up-to-date.

You can use the desktop or mobile Zoom applications to schedule meetings, or you can connect Zoom with your Google Calendar and schedule meetings through your calendar (via browser or Outlook).

Whoever schedules a meeting is responsible for providing a Zoom link and an agenda for the meeting.

Naming Conventions

For calls with clients:
Carnegie | [Client Name] – [Subject]

For internal calls:
INT | [Subject]

+ Expectations

For internal calls, our default is camera-on but feel free to turn your camera off if you're experiencing Zoom fatigue or feel it would not be best for your mental health at the time. We recognize that being on camera requires a lot of energy and that not everyone can sustain that level of energy for long periods of time. If you don't need to be at your computer during a 1:1 meeting with your supervisor, for example, consider taking your call from your neighborhood sidewalk.

Your camera should be on for all client calls.

A few things to remember while on video:

- Demonstrate that you're engaged on every call. This means that you should not be texting, working on other projects, or looking off camera. Situate your computer such that you are directly facing the camera.
- Please choose an appropriate background for yourself in your home or work space, particularly for client calls. If you're unable to find a suitable background, please use the background blur option that Zoom provides to diminish the prominence of your location.
- Your attire during client calls should mimic what you would wear into an office—business professional. Your attire during internal meetings can be casual. While casual wear is acceptable, please do not appear as though you've just awoken from a nap or returned from a workout.
- Be sure to do an audio check prior to your work calls, particularly if you have a speaking part on a client call. Pro tip: headphones with a microphone have proven to deliver the best quality audio.

Additional Cross-Company Software

Harvest

This is our time tracking software, allowing us to collect data that informs workload, hiring needs, and product pricing.

Please see the **Harvest Resource Guide** for all details.

Tinman

This is our custom-built software for tracking proposals requests, client orders and budgets, and invoice schedules and approvals.

A Tinman Resource Guide is in the works and will be published in 2024.

Google Suite

In addition to hosting our email accounts, we use Google Suite to store our files, manage our document templates, and manage file-sharing with clients.

Please see the **Google Suite Resource Guide**.

Other

Individuals on Slate and Digital teams utilize **LastPass** to store/access digital login information.

Individuals on Client Success, Digital, Student Search, and Modeling teams use **Files.com** for storing PII data**.**

Our Business Development and Client Success teams use **Pipedrive** for sales pipeline tracking and reporting.

Company Announcements

If you're involved in team management, committee leadership, or another platform from which you have cause to get the word out to the whole company about an update or initiative, we have several primary channels for making all-company announcements.

+ everyone@

All employees are included on the *everyone@carnegiehighered.com* group email. Unless you are a manager sending a new hire announcement on your direct report's first day, check with a divisional leader or the Operations division prior to sending out an all-company email (we'd love for your news to be heard and not lost in a barrage of Carnegie-wide messages!).

+ All-Company Call

Each Wednesday at 12:00 p.m. EST, we all gather for thirty minutes or less to hear the a different employee host facilitate the week's birthdays, work anniversaries, tenure milestones, new hires, promotions, team shares, and central updates/announcements.

If you have a team or committee announcement to contribute to **the agenda** or are interested in hosting one of these calls (all are welcome!), connect with Morgan Vargas or email *ops@carnegiehighered.com*.

A recap of the meeting is emailed out on Wednesday afternoon each week. If you made an announcement during the call, there's no need to send your own email follow-up.

+ Slack Channels

There are two primary channels for reaching out to the company (and all new employees are automatically added to both):

#general

The #general channel should be reserved for work-related updates, announcements, or questions.

#random

The #random channel is for general crowdsourcing, non-work banter, memes, and other water cooler conversation.

Where Can I Find…?

Need a quick orientation to where you can find common files, folders, or project information? See the list below:

+ Team Resources

Our CD-Resources Drive contains a folder per department or division with relevant resource files. These are managed by each team.

+ Templates

All standard, reusable templates can be found in the template galleries on our Google Drive: **Google DOC template gallery**, **Google SHEET template gallery**, **Google SLIDE template gallery**.

+ Client Files

There are three client drives, sorted alphabetically. Each drive contains a folder per client. All client-specific documents and assets, proposals, and contracts are saved in these folders.

- 📁 CD - Client Folders - A to L
- 📁 CD - Client Folders - M to S
- 📁 CD - Client Folders - T to Z

+ Proposals

Each client folder has a "Proposals" folder that contains all draft responses for RFPs, division-specific proposals, and integrated proposals. Budget spreadsheets for these proposals are also in this folder.

If you need a proposal created for you, the Client Success Leader (CSL) or sales lead on the account should submit a **Proposal Request form in Tinman**. *Make sure your VPN is turned on!*

+ Contracts

Each client folder has a "Contracts" folder that contains any existing Master Service Agreement (MSA), Statement of Work (SOW) draft, final proposal and budget spreadsheets, fully executed contract files, client-issued Purchase Orders (POs), and vendor Insertion Orders (IOs).

Additionally, all fully executed contract files are saved to the relevant **Tinman contract**. (Even if we use a MSA/SOW contract format with a client, a Tinman contract gets created behind the scenes to store the information in Timan, however, this version may not have the detail contained in the SOW.) Please check the Contract File box to view the fully executed contract (the final version with signatures from both the client and Carnegie).

If you need a client contract created for you, the Client Success Leader (CSL) or sales lead on the account should submit a **Contract Request form**.

Contract Files

Carnegie_MountUnion_SOW4_AM END_092622.pdf (93.08kB) ⊗

Drop files here to upload
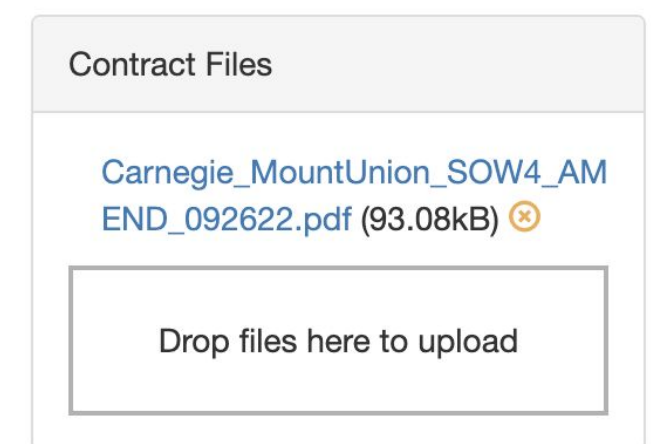
Active Project Budget Details

After a contract is signed, the Account Manager creates a Tinman Order that contains a list of products or campaigns, as well as revenue and cost detail. Each TInman Order has an assigned number (often referred to as the IO #). To locate the relevant Order, ask the Account Manager for the link or **find the right client in Tinman** and then select the specific Order from there. All active Orders will be listed, with an Order number and nickname for easy reference.

See the **relevant Harvest project** for how much of the budget we've "spent" with our time investment in the work thus far.

Carnegie Brand Tools

✚ Brand Guidelines

All marketing resources available for staff use can be found on the **CD – Resources Drive,** in the "Marketing" folder. Quick links are below for easy access:

- **Visual brand guide**
- **Carnegie logos**
- **Presentation deck** (see "Carnegie template" in the Marketing section)
- **Editorial guide**
- **Carnegie brand messaging guide**
- **Carnegie fonts** (downloadable)

To contact Marketing, email
marketing@carnegiehighered.com

✚ Your Email Signature

Please create your Carnegie email signature using the instructions below or by **copying and pasting the correct version from this guide**:

- Please use the Arial font for consistency, as this is generally available across all systems.
- Insert your own information and use your primary work number (optional if you don't have a work number)
- Use the *carnegiehighered.com* URL, unless you are a student-facing CollegeXpress employee or a client-facing community college division employee. In this case use both the Carnegie URL and the sub brand URL and name.
- Use this formatting for sub brands* (example):
  - **CARNEGIE** POWERED BY COLLEGEXPRESS
  - Use this formatting for student-facing CX employees:
    COLLEGEXPRESS a CARNEGIE company
  - Use this formatting for client-facing community college division employees:
    CLARUS a CARNEGIE company

- Brand Colors:
  - Carnegie logo red (digital): 880D0D
  - CollegeXpress blue: 00B6DD
  - CollegeXpress black: 333333
  - CLARUS blueish purple: 283F93
- Font size is 12, with these exceptions: the "a CARNEGIE company" is 11 pt. and the 'powered by x' is 9 pt.
  - (there may be odd conversions depending on your email application - the main point here is to use the font size that you write emails in and make the "Powered by line" three points smaller.)
- *Optional:* If you'd like to include your pronouns, please add them to the right of the name line in (parentheses)

Sample:

Jane Carnegie (she/her/hers)
Senior Analyst
CARNEGIE

C: 000-000-0000
carnegiehighered.com

*Underscore, mStoner, and Maguire Associates references have been retired

4

Ways to Be Involved

TeamCare

Our Corporate Social Responsibility

As a company, we have a responsibility to invest in our people, in their passions, in their communities, and in causes that improve the quality of life for everyone. To that end, our TeamCare initiative was created, channeling each employee's positive energy toward sustainable, inclusive, equity-providing change in our local and national spheres of influence.

This employee-led initiative is comprised of three pillars of focus, each with a dedicated team spearheading efforts and investments:

+ Philanthropy

Through employee volunteer days, as well as corporate activities that produce in-kind and financial donations, Carnegie aims to build partnerships with local and national nonprofits, schools, and neighborhoods by fostering human connections within our communities and a socially conscious culture within our workplace.
Join the #philanthropy Slack channel!

Carnegie provides eight (8) PTO hours per calendar year for volunteering. You can take these at any time—as an individual or with a group! When you do take PTO to volunteer, **please complete this form** to let us know!

+ Sustainability

Carnegie strives toward making a positive environmental impact by encouraging Earth-friendly choices within our offices and homes, providing sustainability-focused educational opportunities and philanthropy, and advocating for long-term lifestyle changes to preserve the health of our planet.

2023 Sustainability Impact Report

Join #sustainability-tips Slack channel!

+ Diversity, Equity, Inclusion

We believe in the power of differences. We embrace every piece of our humanity and desire to celebrate the backgrounds, perspectives, worldviews, and individual demographic and psychographic identifiers that have shaped and continue to shape who we are. We seek to nurture a culture of inclusion across race, gender, age, religion, sexuality, personality, cognition, physical ability, and other dimensions of identity. Finally, we are committed to actively working towards creating a more just, equitable environment for everyone—no exceptions.

There are eight **Employee Resource Groups (ERGs)** established to celebrate and advocate on behalf of various shared identities. More information about these groups can be found on the next page.

To indicate interest in joining any of these groups, please **complete this form.**

TeamCare

Diversity, Equity, Inclusion: Employee Resource Groups (ERGs)

ERGs bring together employees with similar backgrounds or interests. While employer-recognized, these groups are led by employees and organized and designed to support employees. These groups help employees find connection, support, and inspiration. Each group at Carnegie is led by one or more employee leaders and an executive sponsor. **All those who share the group's identity or consider themselves an ally are invited to join. No public lists will be maintained for group participation.**

+ **BIPOC** (Black and Indigenous People of Color)
Led by La Toya Atkinson
Sponsored by Christine Kramer

+ **Disabilities + Chronic Health Conditions**
Led by Jess Severt and Beth Bolay
Sponsored by Bill McLaughlin

+ **Early Career Professionals**
Led by Halie Lewis and Lily Tobias
Sponsored by Meghan Dalesandro

+ **Faith + Work** (all faiths welcome)
Led by Alison Gillaspie and Kelsey Berry
Sponsored by Allison Letizi

+ **LGBTQIA** (Lesbian, Gay, Bisexual, Transgender, Queer, Questioning, Intersex, Asexual)
Led by Desiree Jones and Audrey Maney
Sponsored by Voltaire Santos Miran

+ **Neurodiversity + Mental Health**
Led by Katie Williams and Eric Yeager
Sponsored by Tyler Borders

+ **Women in the Workplace**
Led by Bridget O'Brien, Kristy Phillips, and Natasha Purchla
Sponsored by Alexa Poulin

+ **Working Parents**
Led by Kayla Gaier and Kristen Thayer
Sponsored by Jorie Antuma

To indicate interest in joining any of these groups, please reach out to the leader or **complete this form.**

From a time commitment standpoint, while you can explore all groups, you should commit to no more than two groups at a time. Each group will meet monthly and have an assigned month of the year during which they'll complete a project or initiative, push out ERG-relevant content from central channels, and host an all-company meeting.

Celebrating Our Team

Our people are our most precious asset. Over the years, we've cultivated a culture that prioritizes affirmation and team enthusiasm. Our goal is to maintain and enhance that posture. At Carnegie, we don't believe that employee appreciation should be reserved for once a year—below are several employee celebration programs that are active all the time:

+ Affirmation Ticket Nominations

In addition to posting a note in the #affirmations channel in Slack to highlight stellar efforts from your teammates, you can nominate a coworker to receive a "Carnegie ticket" for going the extra mile in some way.

How do I participate?
Complete the **ticket nomination form** to share why someone has gone above and beyond for you.

Reasons for nominations can include anything from jumping in to cover on a project to being thankful they helped you organize an event, to witnessing how kind they were to a teammate. You could also earn a ticket through participating in other Carnegie activities, like team trivia. Reasons are limitless; affirmations are priceless!

What does the program work?
Each time someone receives a Carnegie ticket, a physical ticket gets placed in a bowl at Carnegie's Westford office.

At the end of the year (December), we host a live (virtual) ticket drawing to find out who the lucky winners are!

What could I win?
Each winner (there are two!) will win a $2,500 travel stipend and bragging rights.

+ Tenure Appreciation

Your years of work at Carnegie have played a significant part in the company's success. To show our appreciation for all you've contributed, we want to to show you some love on a number of employment milestones:

- **1 Year of Service:** Enjoy a Carnegie-branded gym bag on us!
- **5 Years of Service:** You'll be sent a Carnegie-branded Yeti mug and a $500 gift card!
- **Ten Years of Service:** A Carnegie-branded pullover and $750 is coming your way!
- **Twenty Years of Service:** A $1000 gift card will arrive on your doorstep!

The prize winner must be an active Carnegie employee at the time of the drawing and at time of using the prize. Prizes can be claimed by submitted expense report for travel/event/activity value up to $2,500. Carnegie reserves the right to suspend, cancel, or amend this activity at any time. Ticket earning opportunities can vary throughout the year. The intention of this activity is to foster kindness, excitement, engagement, and positivity for the entire Carnegie community.

Activities + Events

Do yourself a favor and add the Carnegie - Training & Events calendar to your calendar list in Google! All events planned by our leadership, TeamCare groups, or Operations division will appear on that calendar. What kind of activities and events can you expect? Weekly you'll hear announcements and updates via our Weekly Company Hangout on Wednesdays and quarterly you'll hear from our CEO, Gary Colen, in a Town Hall-style format. Depending on the season and holiday, stay tuned for individual and team trivia opportunities, just-for-fun raffles, Lobster-themed bingo games, and more.

+ Monthly Programming

In addition to ongoing trainings and events planned by leadership and the Operations team, each month of the year a different employee-led group has the opportunity to share content specific to their work, inviting the company into greater awareness and education on a topic.

To the left are the content owners for each month in the current calendar year:

2024

January – Faith + Work ERG
February – BIPOC
March – Women in the Workplace ERG
April – TeamCare – Sustainability
May – Neurodiversity and Mental Health ERG
June – LGBTQIA ERG
July – N/A
August – Early Career Professionals ERG
September – TeamCare – Philanthropy
October – Disabilities and Chronic Health Conditions ERG
November – Working Parents ERG
December – N/A

Professional Development

In addition to team mentorship, training events scheduled by your divisional leaders, and the all-company opportunities posted on the Carnegie - Training & Events calendar, the following opportunities are available for you:

+ Insperity Training + Development

Insperity Training and Development offers leadership development, training, performance improvement, online learning, and professional education credits for select courses. Some of the most popular topics in recent months include improving business communication, leadership skills, organization and project management, and customer service development.

+ Community Online Academy

Community Online Academy provides live and re-recorded classes on public speaking, leadership skills and personal development. These are offered free through MarketPlace Perks at Work and can be done on your own schedule.

+ Educational Assistance

All active, full-time employees are eligible for financial reimbursement as follows:

- Up to a maximum of $1,500 per calendar year for approved undergraduate or graduate college courses taken as part of an employee's degree program at an accredited institution
- Up to a maximum of $500 per calendar year for approved continuing educational expenses (including courses taken at an accredited trade or vocational school, business school or through a professional association)

For more information, see the **Educational Assistance Program** info page.

Carnegie InsideOut

Carnegie InsideOut is a two-day internal conference—for employees, by employees—designed to cultivate confidence from the inside out.

+ March 7-8, 2024

We're clearing all meetings, avoiding travel, and otherwise holding these two days entirely. The events are on the **Carnegie - Training & Events** calendar. Please copy them to your own calendars.

+ Agenda

There are five main stage sessions (each 45 minutes) and 21 breakout session opportunities (each 30 minutes) on the 2024 agenda.

View the comprehensive schedule for 2024!

+ Participation

This is for all employees. If professional development was included in your annual goals for the year, make sure you plan to participate. There are three ways to participate in the conference:

1. Attendee
2. Presenter
3. Session Host

+ Recorded Sessions

All recordings of 2024 sessions are available to watch and reference in the future.

View session recordings and presentation decks from the 2024 Carnegie InsideOut sessions.

Mentorship Program

Carnegie's company-wide mentorship program has been created **to foster connections that result in knowledge sharing and strengthening your support network**.

+ Why Do We Have A Mentorship Program?

Knowledge Sharing: Carnegie has both seasoned professionals and early career professionals alike. Connecting two people from different seasons of professionalism allows for mutual learning and appreciation.

Strengthening your Support Network: Learning by doing (and oftentimes Googling) is great, but sometimes you need a person to be your sounding board. One of the greatest ways to learn is by connecting with someone who holds a different perspective.

+ Who Should Participate In The Mentorship Program?

A Mentee is any employee seeking guidance on how they can excel in their career and develop skills that will aid them in achieving their personal and professional goals.

A Mentor is an experienced employee with several years of working experience, who has a desire to support others, strong awareness of professionalism, and knowledge of how to set goals, make strategic decisions, and pursue personal growth.

+ How Do I Sign Up? How Quickly Will I Be Paired?

Complete this form to let us know you'd like to be a mentor and/or mentee as well as which topics you're interested in discussing. The Ops team will match mentors and mentees based on all survey responses and provide next steps and instructions at the beginning of the next quarter. All new sign-ups will be evaluated/matched quarterly.

To learn more, see the **Mentorship Program Overview document**.

Thought Leadership

Carnegie's reputation in the higher education industry is as a leader and innovator. We showcase our leadership and innovation in a number of ways: our teams demonstrate the high caliber of our strategy and execution in their day-to-day engagement with clients, we actively publish and present on topics that are valuable to our audience, and we host conferences to share knowledge and provide solutions to the higher education community. Our thought leadership says something different and advances industry conversation. Below are our main avenues of contribution:

+ Our Blog

Carnegie's marketing team welcomes blog topics and submissions. If you're interested in writing something but don't know where to start, you are welcome to reach out to marketing via your manager—they might have a topic waiting for you! Or, try typing a marketing or enrollment topic you're knowledgeable or passionate about into a search engine's search bar. Before you click "enter" look to see what prompts auto-populate—these are the most common searches that people are interested in learning more about.

Read Carnegie's Blog here.

+ Our Conferences

+ **The Carnegie Conference**
  - Carnegie Conference brings in experts from *outside* higher education to provide inspiration and higher ed application.
+ **The Connection**
  - The Connection is a free, three-day virtual conference for enrollment and marketing professionals. Industry experts deliver content that is timely and relevant to the current landscape.
+ **National Small College Enrollment Conference**
  - NSCEC is the only educational and networking event focused on the unique challenges of small colleges and universities.

+ Our Social Media

Please add "Carnegie" to your LinkedIn profile so that our clients know you are committed to their work. Additionally, LinkedIn and Twitter are channels ripe with opportunity to cultivate engagement within our industry:

- **LinkedIn – @Carnegie**
- **X (Twitter)** - **@CarnegieHQ**

CarnegieChem

Discover Who You Are and Who's on Your Team

Just as we are driven to understand who are clients are, we want to know who you are. On our CarnegieChem site, you will be able to take a survey to determine which of our nine proprietary archetypes are most represented in your personality, your top traits and faults, as well as how you score on seven human performance measurements.

> **> Have a friend or family member who wants to learn about their personality?**
> **You can invite them to take the assessment, too using this link!**

THE SPIRITED CHALLENGER | THE CURIOUS INNOVATOR | THE RELENTLESS IDEALIST | THE CONFIDENT GUIDE | THE INVENTIVE REBEL | THE SUPPORTIVE EXPLORER | THE DARING ARTIST
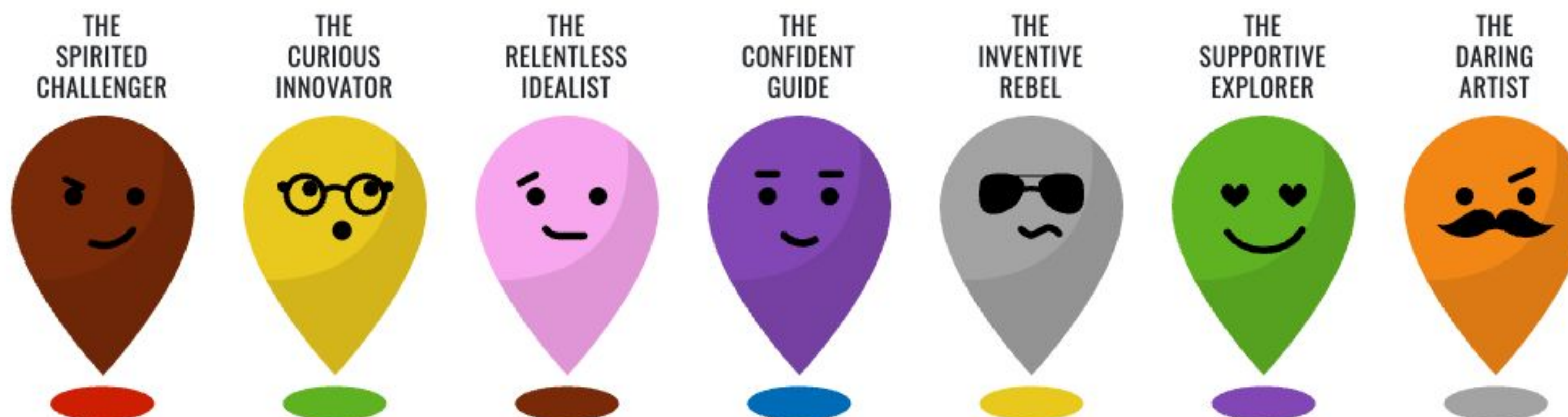
To visit the dashboard after you've initially taken the assessment (see link on page 16), you'll want to bookmark **carnegiechem.com** and use the login credentials you created for the site.

To sync up your work soundtrack with your most dominant archetypes, tune into Carnegie's persona-based Spotify playlists: **Innovator (Yellow)**, **Competitor (Maroon)**, **Rebel (Silver)**, **Supporter (Purple)**, **Sophisticate (Pink)**, **Entertainer (Red)**, **Creator (Orange)**, **Explorer (Green)**, **Achiever (Blue)**.

Come Visit!

Carnegie has two physical office locations. If you're ever in the area for business or pleasure, please stop by! There's always a crew in the office to welcome you.

+ Westford, Massachusetts (headquarters)

210 Littleton Road, Suite 100
Westford, MA 01886

Office Manager: Mary Giurleo
mgiurleo@carnegiehighered.com

+ Matthews, North Carolina

220 North Ames Street
Matthews, NC 28105

Office Manager: Diane McLaughlin
dmclaughlin@carnegiehighered.com

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Human Resources Support

In addition to our small in-house team, you have a team of 5,000 HR professionals ready to support you.

INSPERITY IS OUR COMPANY'S PROFESSIONAL EMPLOYER ORGANIZATION (PEO) THAT PROVIDES OUR BENEFITS, PAYROLL, AND TIMESHEETS.
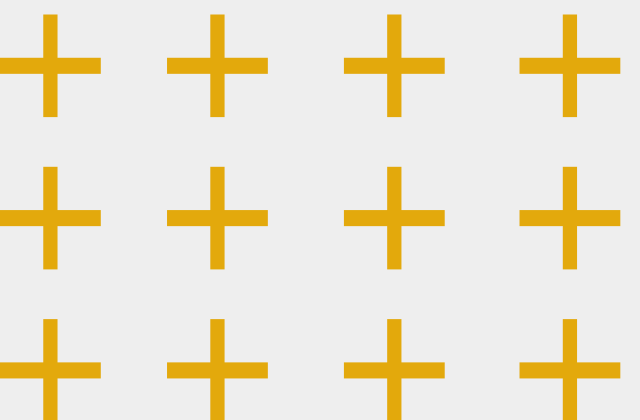
HR Quick Links

+ Insperity Portal

Your Insperity portal is your go-to hub for information about your paystub, benefit elections, documents such as the employee handbook, and where you can update your personal information such as address and email. It also houses our most up-to-date organizational charts.

Insperity Portal Login
Insperity Resource Guide

+ Employee Assistance Program

Through Insperity and administered by Optum, Carnegie offers a great EAP at no cost to employees. Find unlimited telephone and online support as well as additional resources for work, home, or life topics, stress and domestic violence, health education, and more.

Employee Assistance Program (EAP)

+ MarketPlace

The MarketPlace through Insperity offers discounts on thousands of services and items. Options to save include travel, electronics, food, apparel, and monthly cell phone rate discounts.

MarketPlace (perks at work)

+ 401(k): JULY Services

Carnegie's 401(k) plan is administered by JULY Business Services. Employees are eligible after one year of service. Carnegie offers a matching contribution up to 4%.

July Business Services
401k Enrollment Information

+ Job Descriptions

Every title at Carnegie has a job description. **You can view a list of all titles and their associated job descriptions here.**

Taking Time Off

An Uncapped, Flexible Plan

As of January 1, 2023 Carnegie moved to an uncapped, flexible PTO plan for all employees working 20 or more hours per week (new hires may begin taking time off after 90 days or with manager prior approval). All requests need to be submitted to your manager through the **Insperity Portal** as soon as you know which days you'd like to take off.

+ Unlimited Vacation

Carnegie's PTO plan has no cap on paid time off each year for employees. The plan is set up to allow employees to take time off that is reasonable, respectful, and productive to best meet their needs without the stress of a capped number of days.

+ Sick Time

The Sick Time program includes 40 hours per year, or as required by state law. It is meant for unexpected time off due to illness or taking care of a sick family member. Distinguishing Sick Time from Unlimited Vacation days will help us ensure employees are also taking paid time off for vacation, relaxation, and rejuvenation, which Sick Time does not qualify as.

+ How much time off should I plan to take this year?

This is really up to you and what you need. This policy is intended for routine time off work for purposes such as vacation, staycation, relaxation, personal, religious, family needs, etc. While there is no official cap, we would encourage employees to use at least 10–15 days per year. A good rule of thumb is the historical Carnegie time-off schedule of 18–28 days, but there is no hard and fast rule. Speak to your manager for guidance overall on the time that makes sense for you, your role, and your success.

For more information, please see the **PTO Policy info sheet**, and the **company's handbook.**

Taking Time Off

Letting Others Know You Are Away

When you take time off of work (be it for vacation, sick recovery, a holiday, bereavement, extended leave, or personal emergency) we want you to be able to fully disconnect from work thoughts so that your time away is fulfilling and restful. It's hard to stop thinking about work if you are still getting messages and notifications from our communication platforms. To let your Carnegie team members and clients know that you are unavailable, please use the checklist below to ensure you're covering your bases and doing so effectively:

✅ Slack

- Click on your photo in the upper right corner of your Slack window to view your status.
- In the status bar, select an emoji that gives someone pause before messaging you. Popular emojis for PTO include:
  - (palm tree) — palm_tree :palm_tree:
  - (red alert) — rotating_light :rotating_light:
  - (stop sign) — octagonal_sign :octagonal_sign:
  - (sick face) — face_with_thermometer :face_with_thermometer:
- Add a message in your status bar.
- Choose the "Set yourself as away" option.
- Scroll over "Pause notifications" in the menu and select "custom" from the drop-down. Then, select the day/time that you'll be back.

✅ Email

- Navigate to your email settings page, either on desktop or mobile and select "Vacation responder on" from the General section.
- Choose the appropriate first and last days.
- Choose a clear subject line such as:
  - Out of the Office
  - OOO: I am on leave until ____
  - OOO auto-reply: Thank you for your patience
  - I'm on vacation and will return on _____
- Write a response message that includes, at minimum, the following components:
  - A statement that you are away from the office
  - The date that you will return to the office
  - What email address someone can contact while you are away if they need immediate assistance.
  - Appreciation for their patience
  - Your email signature
- Suggestion: If you feel comfortable, feel free to personalize with a note about what you're up to while you're away (not more than one sentence).

✅ Asana

- Click on your photo in the upper right corner of your Asana dashboard and choose "My Settings" from the menu.
- In the "Profile" tab, scroll down to the bottom and slide on the 'Set out of office' toggle.
- Select the appropriate first and last day
- Ensure the box next to "Send push notifications while I'm away" is unchecked.
- Click the "Save changes" button in the lower right.

Related Reminders:

+ Be sure to add your PTO hours to the "OOO - PTO" Harvest project before you leave and submit your weekly Harvest timesheet if you'll be gone on a Friday.

+ If you'll be out on a Monday that requires you to submit your Insperity timesheet, be sure to approve your Insperity timesheet before you leave as well.

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Taking Time Off

PTO Calendars

Upon starting at Carnegie, you'll be given access to our Central Admin PTO calendar as well as your divisional PTO calendar.

Calendar Use

The steps below detail the process for managing those calendars.

1. Employee submits PTO request via Insperity
2. Manager receives PTO request, looks up the date(s) on the relevant PTO calendar, confirms that PTO can be approved and approves via Insperity.
3. Manager adds an all-day calendar event for their direct report's full day or half day PTO to the relevant PTO calendar, using the following naming conventions:
   a. Full Day: **[First Name] [First initial of last name] – PTO**
   b. Half Day: **[First Name] [First initial of last name] – 1/2 PTO (AM/PM)**
   c. examples: "Jane P – PTO" or "Jane P – ½ PTO (PM)"
4. Employee blocks a full or half day on their own calendar, using start and stop times to indicate when they'll be on PTO.
   Note: employees should not invite their manager to this event!

Divisional Calendar Key	
PTO – Central Admin	*all Operations, HR, IT, Finance, and Admin staff and leadership*
PTO – Bus Dev + Marketing	*all Business Development and Marketing staff and leadership*
PTO – Client Success	*all Client Success and Account Management staff and leadership*
PTO – CollegeXpress	*all CollegeXpress staff and leadership*
PTO – Creative	*all Creative staff and leadership*
PTO – Digital Team	*all Paid Digital Media, Integrations, Clarity, and Analytics staff and leadership*
PTO – RMS Team	*all Research, Modeling, and Strategy staff and leadership*
PTO – Slate Optimization Team	*all Slate Communications, Portals, Training, and Reporting staff and leadership*
PTO – Student Search Team	*all Student Search staff and leadership*
PTO – Web Team	*all Web Content/SEO, Design, and Development staff and leadership*

Holiday Calendar

Each year, Carnegie publishes a list of holidays or holiday-adjacent days for which all employees will be paid and can take the day off. The exact list changes from year-to-year so be sure to always check the list for the current year.

2024 Dates

- Monday, January 1st - New Year's Day
- Monday, January 15th - Martin Luther King, Jr. Day
- Monday, February 19th - Presidents' Day
- Monday, May 27th - Memorial Day
- Wednesday, June 19th - Juneteenth
- Thursday, July 4th – Independence Day
- Monday, September 2nd – Labor Day
- Wednesday, November 27th – Early Release 2:00 pm
- Thursday, November 28th – Thanksgiving Day
- Friday, November 29th – Friday after Thanksgiving Day
- Tuesday, December 24th - Christmas Eve Early Release 2:00 pm
- Wednesday, December 25th – Christmas Day
- Wednesday, January 1st, 2025 – New Year's Day

Summer Friday Program

Break out the Sunscreen and Picnic Baskets

Each summer, full-time Carnegie employees are eligible to leave work at 1:00 pm local time on Fridays and be paid for the full day (without taking PTO hours). Below are the specifics of this unique Carnegie perk!

How does it work?

- All eligible employees will be allowed to leave work at 1:00 pm local time and be paid for the full day.
- You are required to work 4.5 hours into your scheduled work day.
  - You may adjust your start time to match 4.5 hours worked with the 1:00 pm end time.
- The 4.5 hours of work time does not include a lunch break.
- If you are using PTO on a Friday that falls within the program schedule, you should submit your PTO request for 4.5 hours instead of 8 hours to take the full day off.
- This program is only for Fridays; you cannot request this time off to be on another day of the week.
- Business needs may hinder you from getting out early during the program.
  - This decision can be made or changed at any time by your supervisor or head of department.

How long does it last?

From the second Friday following Memorial Day to the Friday preceding Labor Day. In 2024, the dates are June 7 – August 30.

How do I know if I'm eligible?

All full-time employees who are routinely scheduled to work a full day on Fridays are eligible.

Carnegie reserves the right to suspend, cancel, or amend this policy at any time. The Company also reserves the right to cancel or suspend use of the program by any employee who experiences performance issues deemed to be related to participation in the program. Such circumstances will be evaluated on a case-by-case basis. In addition, any employee who is currently working a reduced week work arrangement must contact their manager to discuss any new work arrangement during the Summer Friday Program, unless the current arrangement includes a Friday off. If the current arrangement includes Friday off, there will be no change to the arrangement as Summer Friday hours cannot be transferred to any other day of the week.

Traveling for Work

Travel Policy + Reimbursements

Carnegie's travel and reimbursement policies exist to provide employees with a uniform method of reporting and accounting, to set standards identifying acceptable expenses that the company will reimburse, and to improve the management and control of travel and entertainment expenses incurred on company business.

Travel Policy

Employees will be reimbursed for all usual and reasonable travel, entertainment, and other expenses incurred on behalf of, and in connection with, company business. Management, as well as the employee, are responsible for seeing that all provisions of the policy are complied with. Any exceptions to these policies and procedures must be approved by the COO.

Review Carnegie's **Travel Policy + Resource Guide** before and during travel planning.

Reimbursements

All Carnegie-approved expenses (including those not associated with client travel) are to be tracked in the **Certify platform**. For the most part, you will be charging expenses to your personal credit or debit card and submitting them for reimbursement. Reimbursement payment will be issued alongside your paycheck on the payday following your expense report submission.

Review Carnegie's **Reimbursements Policy + Resource Guide** before making any purchases.

PRO TIP: No policy can replace judgment and common sense in the spending, reporting, and controlling of expenses.

Employee Referral Bonus Program

Invite Your Friends and Connections to Apply at Carnegie

If you know of someone who you think would make a great addition to the Carnegie team, not only might Carnegie benefit from a great employee, but you could earn a referral bonus!

Where can I find our open positions?

The **Careers page** on our company website is always updated with current job openings.
You can also **reach out to our Assistant Director, Talent Acquisition**, Samantha Smith to see what positions we have available.

How do I refer someone?

Please **fill out this internal referral form.** By completing this form you are representing that you have a relationship with this person and are acting as a personal and professional reference.

The Talent Acquisition team will contact you directly to discuss the person, their capabilities as it relates to the position for which you are recommending them, and any other information you are able to attest to on their behalf.

What happens after I refer someone?

The Talent Acquisition team reaches out to your referral to discuss the available opportunities. If the team sees there is a match, they will reach out directly to the hiring manager to begin the interview process.

What are the perks of referring someone?

1. If Carnegie hires your referral, you'll receive a payout of $2,000 after that individual has worked with the company for six (6) months (the referring employee must also still be employed with Carnegie in order to receive referral reward).
2. Having a say in who the Talent Acquisition team is considering when adding to our Carnegie family.
3. Being able to invite rockstars like yourself to join Carnegie.

The manager to whom the open position reports, officers of the company (Vice Presidents and above), contractors, and interns are not eligible for this benefit. Final approval determined by COO.

Taking Care of Each Other

In working to cultivate a caring, inclusive, and equitable culture, we've taken some steps to ensure that we hold each other accountable:

Bias Incident Response Protocol

A bias incident is any discriminatory or hurtful act that appears to be motivated or is perceived by the victim or victims to be motivated by race, ethnicity, religion, age, national origin, sex, ability, gender identity or expression, sexual orientation, veteran status, socioeconomic status or language. To be considered a bias incident, the act is not required to be a crime under any federal, state or local statutes.

While bias incidents sometimes target specific individuals, they often violate an entire group or community. Anonymous emails and slurs or language meant to harass individuals convey a message of intolerance.

Reporting Options:

If you have experienced or witnessed a bias incident, there are several ways to confidentially submit a report:

1. You can use the **online report form** that is available.
2. You may submit a phone report by calling Allison Letizi, VP, Human Resources at (978) 842-2751 during business hours. If you choose to leave a message, your call will be returned at the earliest possible time during the next business day.
3. A report can be made by scheduling a meeting with Allison Letizi, VP, Human Resources by emailing **hr@carnegiehighered.com**.

Please see the **Reporting Protocol sheet** for more information.

Inclusive Workplace Language Guide

While human connection is a powerful force, it can also be damaged—intentionally or unintentionally—by our choice of words. Words are containers for power. They can uplift, inspire, show love, affirm. They can also do the opposite. There are common words and phrases that are offensive or inappropriate that can easily wiggle into workplace lexicon, however, there are many alternatives in our **Inclusive Workplace Language Guide** that should be used instead.

Non-Discrimination by Client Contract Clause

In the fall of 2022, we added a Non-Discrimination Clause to our contracts with clients that protects both our people and the work we're asked to execute. If you ever feel that a client is in breach of this clause, please follow the **Client Escalation Protocol**. See the clause below:

"Client shall treat equally all Carnegie employees, affiliates, subcontractors, or any party brought to client for execution of work without regard to race, color, religion, national origin, sex, gender, age, disability, sexual or gender preference, pregnancy, or other characteristics protected by law. Carnegie will also be precluded from executing any work that includes content that is discriminatory or exclusive of any group including race, color, religion, national origin, sex, gender, age, disability, sexual or gender preferences, pregnancy, or other characteristics protected by law."

Supporting Working Parents

Many of our team members have chosen parenthood in one form or another. Honoring this incredible commitment, Carnegie has developed a number of ways to support our working parents.

Pregnancy Loss

We know that fertility is not an easy road for many people. Up to three (3) days of bereavement leave is provided If you experience pregnancy loss. Please see the Bereavement Leave section of the handbook for more details.

New Parents

Unique to every person, Carnegie's Parental Leave Policy was developed with the employee in mind to help support individuals during some of the most exciting and exhausting times of their lives. The plan includes all parents and allows for opportunities for both recovery and bonding. The specific policy details can be found in the handbook, but some FAQs regarding the plan are also provided at the link below.

View the Parental Leave Policy Process.
See Parental Leave Policy FAQs.
Review Carnegie's Employee Handbook.

Breastfeeding Mothers

Time is provided during the work day to express milk. Please see the Lactation Break section of the handbook for more details.

If you need to travel for work during this season of your life, Carnegie provides you with the opportunity to ship milk home. Please see the travel policy for more details.

Parents of School-Age Children

A number of states provide an allotment of hours per year for working parents, legal guardians, or custodians to take time off of work to participate in their children's education and school activities. Please see the handbook to understand if this applies to you and for more specifics.

Employee Handbook

If you have a question about any of the following topics, **please see the Employee Handbook for more information.**

- Employment
  - At-will Employment
  - Equal Employment Opportunity
  - Accommodation of Disabilities
  - Personnel Files
  - Employment References
  - Job Performance Evaluations
  - Separation from Employment
- Employee Conduct
  - Absenteeism and Tardiness
  - Anti-harassment
  - Anti-bullying
  - Guidelines for Appropriate Conduct
  - Drug-free Workplace
  - Tobacco-free Workplace
  - Violence in the Workplace
  - Weapons
- Hours and Compensation
  - Hours of Operation
  - Pay Practices
  - Error in Pay
  - Timesheets

- Overtime for Nonexempt Employees
- Exempt Employee Reduction of Salary
- Lactation Break
- Remote Working
- Flextime
- Operations
  - Inclement Weather Policy
  - Appearance
  - Company Property Inspection
  - Gifts and Favors
  - Business Cards
  - Workplace Accidents and Workers' Compensation Insurance
- Communications
  - Complaint Resolution Procedure
  - Internet Code of Conduct
  - Wireless Communication Device Use Guidelines
  - Solicitations and Distribution of Literature
  - Media Contact

- Employee Benefits
  - Holidays
  - Paid Time Off (PTO)
  - Volunteer Time Off
  - Insperity Online Services
- Leave of Absence
  - FMLA
  - Parental Leave
  - Bereavement Leave
  - Continuation of Benefits
  - Jury Duty and Witness Leave
  - Military Leave of Absence
  - Personal Leave of Absence
  - Voting Leave
- State-specific Policies

HR Forms + Links

General

- Bias Incident Reporting Form + Protocol
- Bio and Headshots
- CarnegieChem™ Personality Assessment
- Employee Handbook
- Employee Referral Form
- Inclusive Workplace Language Guide
- Insperity Resource Guide

Timesheets + Payroll + Time Off

- How to Read Your Check Stub
- Time and Attendance
- Time and Attendance Employee/Supervisor Video Library

Team Celebration

- Carnegie Activities
- Carnegie Tenure Appreciation Program
- Team Affirmation Nominations - Ticket Program

Benefits

- 401(k) Online Instructions
- 401(k) Payroll Authorization
- Alex Interactive Benefits Selection Support Tool
- Educational Assistance
- Health Savings Account (High Deductible Plans Only)
- Holiday Calendar - 2023
- Holiday Calendar - 2024
- Insperity Training
- Mid-Year Insurance Change
- Harvard Pilgrim
- UnitedHealthCare
- VSP Vision Care
- Insurance Rates - 2024

CONTACT

who to contact in human resources

+ ALLISON LETIZI

VP, HUMAN RESOURCES
hr@carnegiehighered.com

+ Benefits
+ General HR
+ Employee support, including
DEI, bias incident reporting,
disability, leave, employee
assistance program (EAP)
+ Performance Reviews

+ KRIS PETERSON

BUSINESS MANAGER
kpeterson@carnegiehighered.com

+ Payroll
+ Expenses
+ Paid time off (PTO)
+ Tenure awards

6

Information Technology Support

IT Support

+ 2-Factor Authentication

Carnegie requires 2-Factor Authentication to be turned on. If you do not enroll immediately, you will eventually get locked out of your account and will need IT assistance to regain access:

- Navigate to your **Google Account Page**
- Click on the Security tab
- Scroll down to the "Signing in to Google" section
- Next to " 2-Step Verification" change "Off" to "On"
- Follow the prompts from there to add your phone number and verify your details.

For more information and instructions, please see **the IT Support site.**

+ VPN Access

In order to access Carnegie's VPN network, you'll need to download and install the OpenVPN application and sign in using your Carnegie network credentials. VPN access is required in order to access Tinman, our software for tracking proposals requests, client orders and budgets, and invoice schedules and approvals.

+ Passwords

The initial network password you received with your computer is temporary and must be changed. Passwords expire every 90 days and must be changed before expiration to avoid disruption. You'll start to receive emails regarding its expiration as the date nears.

Requirements:
- Passwords cannot be the same as any of the previous 3 passwords
- Passwords must be at least twelve characters in length
- Passwords must contain characters from three of the following four categories:
  - English uppercase characters (A through Z)
  - English lowercase characters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphabetic characters (for example, !, $, #, %)
- Passwords must NOT contain the user's account name or parts of the user's full name that exceed two consecutive characters

CONTACT

do you have a technical concern or issue?

Submit a ticket by emailing helpdesk@carnegiehighered.com.

For all hardware and technical software questions and issues, please create a ticket for the Help Desk team by emailing the address above. Requests are generally acknowledged the same business day.

Note: Any equipment requests must be approved and submitted by your manager.

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Production Resources

A Higher Ed Primer

Whether you're new to higher education, want a refresher, or want to learn more about department-specific lingo and strategies, see the resources below:

+ Glossary of Terms

A Carnegie crowd-sourced **collection of common marketing and enrollment terms** has been pulled together over the last several years. Please use this as a resource and contribute to it as new trends emerge.

+ Recorded Webinars

Experts from the Carnegie team regularly present webinars on best practices in enrollment and marketing, case studies, trends, and how to handle updates to commonly used industry tools.

See our recorded webinars on our website.

+ Higher Ed 101 Presentation

Watch one of our leaders walk through some of the key challenges we see our clients faced with, types of institutions we work with, types of students, the admissions cycle, regional differences, impacts of Covid, and more.
Access the recording here.
passcode: !!g?7wr7

+ White Papers + Research

One of the advantages of having an in-house research team, access to a million+ database of prospective students (CollegeXpress), and many other flavors of technical experts is that our own team is regularly publishing white papers and new research within the industry.

See the latest white papers and research studies on our website.

+ Conference Presentations

Each January Carnegie hosts a conference for higher education enrollment and marketing staff. The speakers chosen are intentionally not in the higher ed industry, but present on new technology, trends, and strategies that will push the industry forward.

Of note: Carnegie's Chief Leadership Strategist, Scott Ochander, presented this year on top concerns and challenges facing higher ed leaders right now. Check out his deck at the link below!

See the presentations from this year's conference here.
This link cannot be shared with clients who did not attend the conference.

Portfolio Overview

As our portfolio has grown over the years, we've acquired expertise that is both wide and deep. This has enabled us to offer our clients one solution (us) to address all of their enrollment and marketing needs and challenges. Below you'll find an overview of our core competencies—recorded presentations given by leaders across our organization.

+ Brand Strategy

Campus perception, external market perception, and the competitive market landscape. **See the recording, starting around 20:30 minutes in.**

+ Digital Marketing

Social media, paid search, programmatic display, campaign strategy, and data intelligence. **See the divisional overview recording. See the Clarity overview.**

+ Enrollment Strategy

See a strategy team overview here. For more about our enrollment ecosystem, see the recording here, starting around 3:32.

+ Financial Aid Optimization

Financial aid modeling, recruitment modeling ,and student success modeling. **See a financial aid optimization webinar here.**

+ Integrated Research

Brand, audience, geodemographics, and creative testing research, as well as custom research. **See the departmental overview recording here.**

+ Lead Generation

Carnegie's proprietary CollegeXpress platform. **See the recording here.**

+ Marketing Strategy

See a strategy team overview here. For a look at how our integrated enrollment and marketing strategies serve clients, see the recording here.

+ Slate Optimization

Slate CRM communications, implementations, portals, and trainings. **See the divisional overview recording here.**

+ Signature Creative

Conceptual work, print and digital collateral, multimedia, web design, training, and creative analysis. **See the divisional overview recording here.**

+ Student Search

A different way of building student search—one that's based on the students' terms. **See the webinar recording here.**

+ Web Development

Website strategy, design, development, and content and search engine optimization. **See the divisional overview recording here.**

Understanding the Archetypes

Archetype Theory for Organizations and Teams

Humans understand other humans better than anything else. We are genetically wired to relate our experiences, desires, and preferences to human personality. Our understanding of "Self" drives how we behave and interact with the world. At Carnegie, we tap into that DNA and help organizations, places, and teams with attraction through the science of human connection. Nine distinct, color-named archetypes have been developed, tested, and refined over the last 15 years.

INNOVATOR | YELLOW
Brilliant and forward-thinking
Driven by inventing the future through innovation. Delivers advancement, ingenuity, and radical outcomes. Values newness, experimentation, and progress. Causes people to feel awe and amazement.

SOPHISTICATE | PINK
Sophisticated and refined
Driven by experience, elegance, and beauty in all forms. Delivers excellence, finesse, and vitality. Values poise, intentionality, and beauty. Causes people to feel desired and important.

PROVIDER | PURPLE
Supportive and selfless
Driven by compassion, warmth, and the desire to care for others. Delivers nurturing, comfort, and protection. Values altruism, commitment, and generosity. Causes people to feel valued and supported.

EXPLORER | GREEN
Adventurous and inquisitive
Driven by the quest for discovering the unknown. Delivers progress and an unmatched interest for uncovering truth. Value investigation, curiosity, and trailblazing. Causes people to feel intrigued and emboldened.

COMPETITOR | MAROON
Resilient and tenacious
Driven by overcoming challenges through grit and determination. Delivers surprising strength, perseverance, and toughness. Values fortitude and hard work. Causes people to feel triumphant and inspired.

ENTERTAINER | RED
Energetic and enthusiastic
Driven to entertain and cause others to get excited. Delivers fun and the desire to amuse and uplift. Values energy, playfulness, and enjoyment. Causes people to feel exhilarated and happy.

CREATOR | ORANGE
Creative and imaginative
Driven by self-expression and artistry. Delivers something new that encourages creativity. Values originality, ideation, and new concepts. Causes people to feel constructive and expressive.

ACHIEVER | BLUE
Powerful and assertive
Driven by growth and being a frontrunner. Delivers stability, pride, and strength. Values power, influence, and accomplishment. Causes people to feel confident and in control.

REBEL | SILVER
Daring and rebellious
Driven by challenging and redefining the norm. Delivers empowerment, change, and boldness. Values independence, guts, and breaking with convention. Causes people to feel unrestrained and fearless.

File Naming Conventions

To streamline our ability to locate client files within the Google Drive and understand what each file contains without having to open each one, we developed standard naming conventions for both client deliverable folders and files as well as contracts.

✚ Client Deliverables

Folders

[Tinman Order #] _ [Client Code] _ [Deliverable Name]

Files

[Tinman Order #] _ [Client Code] _ [Deliverable Name –(optional)additional description]

Revisions

[Tinman Order #] _ [Client Code] _ [Deliverable Name –(optional)additional description]_R#_V#/CR

Where:

"R#" = "Round Number"

"V#" = "Version Number"

"CR" = Client Ready

✚ Contract Files

[Client Code] _[Document Type]_[brief project description]_[effective date]_ #[Tinman Order Number]

Examples:

OHNORTH_MSA_SOW1_personality_darts_search_digital_030922_#51859

OHNORTH_SOW2_digital_051122_#52230

OHNORTH_SOW3_conduit_061422_#52611

Selling Ourselves

There are many different people and teams who contribute to cultivating interest in our work and securing client approval to move forward.

+ Business Development

Our business development team is responsible for:

- Translating all we do and say (from Carnegie and Marketing) into the sales arena for positioning us as best possible to generate and win business
- Proposals/RFPs
- Pitches and presentations
- Case studies and stories
- Conference and event presentations
- Strategic planning and pursuit

+ New Client + Vertical Sales

Our new client and vertical sales teams are charged with:

- Generating, qualifying, and closing sales leads and opportunities across all areas of our company
  - This includes discipline-specific emphasis (CX, Student Search, Slate, etc.)
- Dedicated sales and partnership focus for prioritized growth verticals within the higher education industry

+ Marketing

Our internal marketing team oversees the following:

- Carnegie brand and storytelling, content marketing and demand generation.
- External communications strategy and execution
- Content marketing: to build brand reputation and generate quality leads
- Ownership of key marketing tools: Website, media kit, etc.
- Brand expression and unification of sub-brands
- New market initiatives strategy and support: acquisitions, new verticals and products
- Internal company communications

+ Client Success

Currently active clients each have an assigned Client Success Leader (CSL) who is responsible for:

- extending our work with these clients
- expanding that work across our portfolio
- growing smaller accounts into larger accounts (based on total spend and complexity)

+ Operations

The legal administration that accompanies the selling of our work includes:

- creating contracts, including scope and invoice schedule management
- negotiating terms and conditions
- procuring signatures

How Work Gets Sold

Have you ever wondered how a bill becomes a law—I mean, how we sell our work? See a simplified flowchart below:

An institution issues an RFP (Request for Proposals). → The institution invites us to respond via email or our Bus Dev team finds the RFP and decides to pursue it. → Our Bus Dev team submits a proposal based on the challenges noted in the RFP. → The institution reviews all proposals and selects Carnegie as a finalist; invites us to pitch to their team. → We assemble a pitch team and customize a pitch deck. → We get notified that we've won the work!

A Carnegie salesperson reaches out to a list of people and hears back from someone who would like to see a proposal.

A Carnegie team member attends a conference and makes a connection with someone from a college/university. → That team member sends a follow-up email to the connection to see if they'd like a proposal. → The sales lead submits a Proposal Request in Tinman and provides a detailed description of the client need. → Our Bus Dev team works with divisional Subject Matter Experts to create a proposal based on the client's needs. → The sales lead works with the client and the Bus Dev team to refine the proposal until it's the right scope and cost. → The client requests a contract for the work. → We write a contract for the work; the sales lead sends it to client for review/ signature.

Someone at a college/ university reads one of our blog posts and submits an inquiry on our website. → The inquiry gets sent to a salesperson who reaches out with a request to meet. → If the meeting goes well, the person who sent the inquiry requests a proposal.

A Client Success Leader suggests a new piece of scope to an existing client to solve an identified challenge.

What Type of Contract do I Need?

There are three types of acceptable contract types that we will use for work with clients (numbered in order of preference below). Please use the following decision tree to understand what type of contract to use:

START HERE

Does the client require us to use their contract template?

→ No → Does the client have an existing/active Master Service Agreement (MSA) on file with Carnegie already? → Yes → **1** Request a Statement of Work (SOW) from the Operations team using the Contract Request form.

↓ Yes

1 Use their contract. Send them complete scope to include. When they send you a draft, please submit it for review using the Contract Request form.

MSA question → No → **1** Request a Carnegie Tinman Contract using the Contract Request form. ⋯→ What if the client pushes back and requests a MSA/SOW format? ⋯→ **2** Request a MSA and SOW from the Operations team using the Contract Request form.

What happens if scope changes?

After a contract is signed, there are times when the scope or budget of a project needs to change. If you find yourself in that situation, please use the diagram below to appropriately document and receive approvals on the changes.

START HERE

When the client indicates they'd like to change scope, the CSL should:
1. open a new Tinman Proposal Request with the context behind the change request
2. send a note to the Account Manager and any Strategists currently working on the project

When the Tinman PR creates a new Asana card, a scope document and budget spreadsheet should be created for the new scope by those authorized by each division to develop these. (*A meeting with the client and SMEs may need to be scheduled in order to figure out what the new scope should be.*)

CSL receives the appropriate approvals to move forward.

Are we talking about a change within a Digital Media plan?

No →

Yes ↓

Does the change require additional budget?

Yes →

No ↓

Provide the details of the change in an email and ask the client to respond to the email with written approval. Then, save that email thread on the Google Drive.

Request a new Tinman Contract for the additional funds via Contract Request form.

Does the change require additional budget (or a budget shift between Carnegie divisions)?

Yes

No ↓

CSL should ask the client if they would like to approve the scope swap via email.

If "No"

If "Yes"

Request a contract amendment via the Contract Request form and in your submission provide details on exactly what scope and budget is being removed and what scope and budget is being added. *If you do not have this information, go back to step #1.*

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Think this resource guide is missing something?

Fill out the central operations suggestions and feedback form.

Thank you for taking the time to provide your thoughts!

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