At Carnegie, we seek to uphold a culture of inclusion across race, gender, age, religion, sexuality, personality, cognition, physical ability, and other dimensions of identity. All expressions of aggression toward another person are not welcome.

Bias Incidents

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.

Example of biases:

- Verbal, physical, or online harassment (e.g. text, social media)
- Damage to property via written slur, grati, or hate symbol
- An older employee is believed to not be as competent or capable as younger employees
- Sexual orientation bias is treating someone differently solely because of his or her or perceived sexual orientation.

On the other hand, hate crimes are biased incidents and are considered to be criminal behavior. Hate crimes must be reported to Allison Letizi, VP, Human Resources. If you are unsure if the bias incident that you wish to report is a hate crime, please contact Allison Letizi, VP, Human Resources.

Why Should I report?

While bias incidents sometimes target speci c 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 con dentially 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.

What Happens After I Submit a Report?
Following the submission of a report involving a bias incident, the Bias Incident Response Team will respond within two (2) business days. As a part of that response, you will be provided with information on the Employee Assistance Program (EAP) and additional company resources to get you the support you need.

How Will Reports Be Used?
Reports summarizing incidents of bias will be made available to the Bias Incident Response Team. The Bias Incident Response Team collects data regarding bias incidents occurring at Carnegie, to reveal a clearer picture of what our staff is experiencing, and provides information to our staff regarding broader support resources, learning, and healing. In the event that the reported incident is a violation of federal, state or local statute, the company may be required to take speci c legal action to address the incident and its effects.

Brand Guide

JANUARY 2022

Fonts

BODY TEXT - BARLOW

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
1 2 3 4 5 6 7 8 9 0 ! @ # $ % &

HEADERS - DM SERIF DISPLAY
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
1 2 3 4 5 6 7 8 9 0
! @ # $ % &
Regular, Condensed

Regular
Italic

SemiBold
SemiBold Italic
Bold
Bold Italic
ExtraBold
ExtraBold Italic
Black
Black Italic

Thin
Thin Italic
ExtraLight
ExtraLight Italic
Light
Light Italic
Regular
Italic
Medium
Medium Italic

Logo

GREY LOGO

RULED LOGO WITH TAGLINE

STANDARD LOGO

PRIMARY

CARNEGIE_MAES-TAG_RULE

CARNEGIE_LOGO

CARNEGIE_LOGO_GREY

Use standard logo as primary logo for daily use such as conference presentations, pitch decks, client facing documents, webinar title slides, swag, booths and banners.

Use the standard logo in gray on interior pages of documents and presentations.

Use the ruled tagline logo on covers of print materials and proposal documents.

LOGO COLORS

CARNEGIE_LOGO_BLACK

CARNEGIE_LOGO_WHITE

CARNEGIE_LOGO

CARNEGIE_LOGO_GREY

PRIMARY

LOGO USAGE

LOGO USE FOR DOCUMENTS:
+ Use the Carnegie print crimson logo ..#992036* as the primary logo
+ Use the ruled tagline logo on covers of print materials and proposal documents.
+ Carnegie logo in gray will be used in pitch and proposal document interior pages when both white and full color backgrounds are used
+ Use the black logo on black and white printed documents
+ Click here to access logos for print usage

LOGO USE FOR WEBSITE:
+ Use the Carnegie digital red logo ..#880D0D on the current site; Carnegie white is a secondary option and can be used when full color background is used on site (6/2021)
+ Click here to access logos for digital usage

Logo Colors

DIGITAL LOGO

PRINT LOGO

CRIMSON

RED

RGB

153, 32, 54

RGB

136, 13, 13

#880D0D

CMYK

27, 98, 75, 22

#992036

BOTH

BLACK

WHITE

MEDIUM GREY

PRINT AND DIGITAL

RGB

255, 255, 255

RGB

0, 0, 0

RGB

216, 216, 216

0, 0, 0, 100

CMYK

0, 0, 0, 0

CMYK

14, 11, 11, 0

CMYK

#FFFFFF

#000000

#D8D8D8

Print Brand Colors DOCUMENTS SUCH AS: PROPOSAL/RFP, ANYTHING PRINTED

SECONDARY

PRIMARY

DARK GOLD

DARK NAVY

NAVY

CRIMSON

3, 35, 47

RGB

RGB

180, 156, 54

RGB

31, 70, 95

153, 32, 54

RGB

CMYK

91, 70, 57, 65

CMYK

CMYK

31, 33, 98, 3

92, 68, 42, 29

CMYK

27, 98, 75, 22

#992036

#03232F

#1F465F

#B49C36

GOLD

LIGHT GREY

MEDIUM GREY

DARK GREY

RGB

217, 167, 41

244, 244, 244

RGB

RGB

216, 216, 216

130, 130, 130

RGB

16, 34, 100, 0

CMYK

CMYK

3, 2, 2, 0

14, 11, 11, 0

CMYK

CMYK

51, 42, 42, 7

#D9A729

#D8D8D8

#F4F4F4

#828282

Digital Brand Colors WEB USE SUCH AS: WEBSITE, DIGITAL ADS, PRESENTATIONS

SECONDARY

PRIMARY

DARK RED

NAVY

RED

DARK NAVY

116, 11, 11

RGB

RGB

RGB

136, 13, 13

RGB

3, 35, 47

31, 70, 95

#740B0B

#880D0D

#03232F

#1F465F

GOLD

DARK GREY

MEDIUM GREY

LIGHT GREY

227, 169, 12

RGB

244, 244, 244

RGB

RGB

RGB

216, 216, 216

130, 130, 130

#E3A90C

#F4F4F4

#D8D8D8

#828282

Archetype Colors

SILVER - REBEL

ORANGE - CREATOR

BLUE - ACHIEVER

RGB

173, 173, 173

RGB

RGB

238, 117, 37

25, 84, 161

32, 27, 27, 0

CMYK

CMYK

95, 75, 3, 0

CMYK

2, 67, 98, 0

#ADADAD

#1954A1

#EE7525

RED - ENTERTAINER

GREEN - EXPLORER

BEIGE - WANDERER

RGB

211, 32, 38

RGB

233, 217, 196

RGB

32, 163, 27

8, 13, 22, 0

CMYK

11, 100, 100, 3

CMYK

CMYK

91, 9, 100, 1

#E9D9C4

#20A31B

#D30909

COLORED TEXT ON WHITE BACKGROUND

PURPLE - PROVIDER

YELLOW - INNOVATOR

BEIGE - WANDERER

237, 203, 6

RGB

90, 55, 149

RGB

211, 197, 176

RGB

9, 16, 100, 0

CMYK

CMYK

80, 95, 0, 0

CMYK

18, 19, 30, 10

#EDCB06

#D3C5B0

#5A3795

PINK - SOPHISTICATE

MAROON - COMPETITOR

121, 30, 22

RGB

224, 152, 211

RGB

31, 95, 100, 40

CMYK

12, 46, 0, 0

CMYK

#E098D3

#791E16

CollegeXpress BRAND

HEADERS - PROXIMA SOFT
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
1 2 3 4 5 6 7 8 9 0
! @ # $ % &
LOGO

COPY - RALEWAY
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
1 2 3 4 5 6 7 8 9 0
! @ # $ % &
COLORS

CX BLACK

CX BLUE

RGB

51, 51, 51

RGB

0, 182, 221

CMYK

69, 63, 62, 58

CMYK

73, 4, 8, 0

#006BDD

#333333

LOGO USAGE

LOGO USAGE:
+ Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Underscore BRAND

LOGO

COLORS

GREY

SAGE

TANGERINE

180, 156, 54

RGB

31, 70, 95

RGB

110, 152, 142

RGB

CMYK

7, 62, 99, 0

CMYK

57, 47, 48, 14

CMYK

60, 27, 45, 2

#E57B26

#6F7271

#6E988E

LOGO USAGE

LOGO USAGE:
+ Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

MStoner BRAND

LOGO

COLORS

EXPIRES END OF MARCH

CHARCOAL

BLUE

RGB

60, 60, 60

RGB

0, 173, 239

CMYK

68, 62, 60, 50

CMYK

69, 15, 0, 0

#3C3C3C

#00ADEF

LOGO USAGE

LOGO USAGE:

+ Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

This style guide is meant to provide specific guidelines (corporate identity standards) for the use of Carnegie branding and company-wide copy in all types of communications and applications. It does not necessarily pertain to divisions with existing design and editorial guidelines (i.e., Production, RSC, etc.).

BRANDING

Any references to our company and departments therein should be formatted as follows.

Official name

* Text reference in documents:
  * “Carnegie” should be used in all documents as primary brand name reference.
  * “CarnegieHigherEd.com” should be referenced in all documents. It may be in a footer, a Contact Us page, a cover page, or a final page of the document.
  * “Carnegie Dartlet LLC” should be referenced once in all documents. It may be in a footer, a Contact Us page, or a final page of the document.
  * When LLC is referenced, use “Carnegie Dartlet LLC”; no comma.

* Text reference on website:
  * Use “Carnegie Dartlet” in the first text reference and on top level pages; thereafter, use “Carnegie”.
  * When LLC is referenced, use “Carnegie Dartlet LLC”; no comma.

Carnegie teams/divisions
* Account Management
* Business Development/Sales
* Creative
* CollegeXpress
* Corporate Marketing
* Digital Services
* Inbound Marketing
* Paid Marketing
* Production
* Research
* Slate Optimization
* Social Media
* Strategy
* Web Development

Suite of services
* Brand Strategy
* Digital Marketing
* Enrollment Strategy
* Integrated Research
* Lead Generation

* Marketing Strategy
* Personality Assessments
* Signature Creative
* Slate Optimization
* Student Search
* Web Design + Development

Trademarks

* Official trademarked logos should be used when possible and appropriate (i.e., Carnegie Clarity™).

Websites

* CarnegieHigherEd.com, carnegiehighered.com
* CollegeXpress.com, collegexpress.com
* UnderscoreHigherEd.com, underscorehighered.com
* mStoner.com, mstoner.com

Social media

* When referring to a company social media account, only the handle need be used (ex. "Reach us on Twitter @CarnegieHQ," as opposed to a "Reach us on Twitter at twitter.com/carnegiedartlet"), preferably linked to the account website in question.
* Account names/handles and links are as follows and should be used when possible and appropriate:

Carnegie Corporate:

LinkedIn: Carnegie
Twitter: @CarnegieHQ
Instagram: @carnegiehq

Contact information
* Website: CarnegieHigherEd.com
* Email: info@carnegiehighered.com
* Main phone: 978-692-5092
* Westford fax: 978-692-4174

Physical address
* Carnegie Dartlet LLC
210 Littleton Road, Suite 100
Westford, MA 01886

Locations
* Westford, Massachusetts
* Bend, Oregon
* Grand Rapids, Michigan
* Matthews, North Carolina
* Nashville, Tennessee
* Chicago, Illinois

TEXT/EDITORIAL GUIDELINES
All company copy—including marketing materials, RFPs, and website text—should adhere to the following style guidelines. For questions concerning grammatical elements not covered in the style guide, defer to the most current edition of The Chicago Manual of Style (or your friendly neighborhood editor/proofreader).

Alphabetizing
* Institutions or other organizations with names that begin with “The” should be placed in alphabetic order by the second word. However, some institutions are very firm about having “The” be part of their name (ex. The Master’s College), in which case alphabetize by the T. When in doubt, check with the Regional Director for that college.
* Word-by-word alphabetization should be used, including spaces and symbols (ex. La Roche College should come before Lafayette College). When alphabetizing, a blank space “outranks” a symbol; a symbol “outranks” a letter (ex. Student groups include El Amigo, El-Aafidha Student Group, and Elizabethtown Democrats). The only exception to this rule is

D’Youville College, which should be alphabetized as though the apostrophe does not exist.
* Lists should be placed in alphabetical order whenever possible.

Capitalization
* Commonly used industry and company terms and services
  * Always capitalize: Carnegie ClarityTM, Communications-Flow or Comm-Flow (as in Comm-Flow audit; communications flow in general), Google Analytics, IP Targeting, Mobile-Based Location Targeting (or Mobile Location Targeting), Mobile Footprints, Online Display (or Display), Pay Per Click, Regional Director, Retargeting, Rooftop Targeting, Search Engine Marketing, Search Engine Optimization, Web Development, Slate Optimization, External Perception Research, Student Select Online Network, and Student Search
  * Always capitalize any mention of the archetype colors (Purple, Blue, Maroon, etc.). When the archetype color names feature in an all-caps title, place quotation marks around the color name (i.e., EXPRESS MORE “PURPLE”).
  * Do not capitalize personalized landing pages, personalized URL (acronym PURL is okay), social media, paid search, and variable data printing when part of in-line copy.
  * Do not capitalize graduation year terms such as freshman, sophomore, junior, and senior. However, we do capitalize class years (ex. the Class of 2018).
  * Always capitalize Student Search; do not need to capitalize “search” when used in general (ex. Let Carnegie Dartlet help you devise the perfect Student Search strategy. We can help you search for the perfect students. Carnegie can help you appear in search.)
* Email addresses
  * Email address should always be lowercase.
* Headers
  * Employ title case when capitalizing words in H1s/titles: capitalize first, last, and principal words; do not capitalize prepositions, articles, or conjunctions unless one is the first or last word, it is four letters or more, or the word is significant in context.
  * Use downstyle/sentence case for subheads: capitalize only the first letter of the first word and proper nouns.
  * Do not use periods at the end of headers, even if they are complete sentences. (Exclamation points and question marks are okay.) [Exception for styling on the website - more to come here]
  * Always use numerical figures in article titles, including 0–9 (ex. Top 5 SEO Tips).
* Titles
  * Capitalize all formal titles (ex. Joe Moore, CEO and President; Vice President and Dean of Admissions at Quinnipiac University Joan Isaac Mohr).

* Acronyms and all caps
  * Acronyms are capitalized and do not have periods (ex. NRCCUA, ROTC).
  * Do not use all-uppercase words within text (ex. Instead of “The University is a BIG EAST CONFERENCE school,” use title case: “The University is a Big East Conference school”). Substitute italics when emphasis is required (ex. It’s your education; make the most of it!).
  * [Exception for style choice on the website - more to come here]
* Bulleted lists, notes, etc.
  * Capitalize the first letter after bullets, asterisks, and similar text elements, unless it is preceded by a numerical figure.
* Majors
  * All academic majors are capitalized, used specifically or in general (i.e., She is a Journalism major. She studied Journalism in college. The school offers Journalism programs in Print or Broadcast Journalism.)
* College/university
  * Capitalize “College” and “University” if they are used specifically rather than generically (ex. There are many shops, restaurants, and art galleries within walking distance of the College. Not every college or university is created equal).
* When in doubt about capitalization: If you are referring to the “official” or proper title/term for one of our specific services, capitalize. If the term is a general reference, it should not be capitalized.

Collective nouns
* A wide range of ________ is...
* A number of _______ are...
* A variety of ________ are...
* A multitude of ________ is...
* A plethora of ________ are...

Colons
* Use one space after colons, not two (Scott!).
* Lowercase the first letter of a phrase following a colon in copy (ex. This is our style: one space only).
* Lowercase the first letter of a single sentence following a colon in copy (ex. This is our style: we use only one space after colons).
* Capitalize the first letter of multiple related sentences following a colon (ex. She had many questions regarding the style guide: Why is it so extensive? Who would think of such

inane rules? Does anyone really care about the Oxford Comma? Answers: to make sure every possible issue is accounted for, a tightly wound grammar nerd, and yes.).
* The first letter following a colon in a subhead or sidebar line items may be capitalized if the text is part of the design elements (ex. [found in a sidebar] Financial aid: More than 90% of students receive some form of financial aid.).

Commas
* Our style is serial/Oxford comma; when listing items in a series, include a comma before the conjunction (ex. Intramural sports offered at TCU include soccer, golf, and basketball.).
* When a city and state are listed together, commas should be used after the state's name (ex. Easton, Massachusetts, is nearby).
* Do not use commas between a person's name and "Jr." and "Sr." (ex. Martin Luther King Jr.).

Commonly misused terms
* Fewer/less: "fewer" should be used when discussing a known amount; "less" should be used when discussing an abstract amount (ex. The essay requires 500 words or fewer. He couldn't care less).
* Further/farther: "further" should be used when discussing things in the abstract; "farther" should be used when discussing distance (ex. Let's take this even further! We haven't much farther to go).
* Its/it's: "its" is an adjective indicating the possessive; "it's" is a contraction of "it is" (ex. The car had lost much of its value. It's 15 years old).
* There/they're/their: "There" is an adverb, used to describe a place. "They're" is the contraction of "they are." And "their" is an adjective, used to describe possession (ex. They're tired of taking their old car all the way over there to go to the shop).
* Your/you're: "your" is used to describe ownership; "you're" is a contraction of "you are" (ex. You're talking too much about your car).

Commonly used industry terms
* Okay to use both "admission" or "admissions" depending on school and author preference; Carnegie company materials prefer the plural.
* "Résumé" with two accents

* Website (one word, typically lowercase), web, web page, online, internet, email (or Email, if beginning a sentence)
* Bachelor of Arts, Bachelor of Science, bachelor's degree, BA, BS, BFA
* Master of Arts, Master of Business Administration, master's degree, MA, MBA
* Associate degree

Carnegie specific key phrases, and terms:
* Solution: "Solution" is a combination of our best-in-class services, an integrated strategy, and an answer to a client challenge/need. It's the result of our problem-solving for clients. The word should be reserved for this purpose as much as possible.
   * [helpful example]
* Funnel: "Funnel" should be used in reference to past enrollment management and marketing thinking and as a tool to build understanding for our point of view on the enrollment and marketing ecosystem.
   * [helpful examples]
* Higher Education Marketing and Enrollment Management: This is who we are and what we do in the simplest form.
* Psychometrics: When using the word "psychometrics," always define it in the sentence. "—demographic and psychographic data, like personality, motivations, and beliefs—"

Sub-brands: The brand hierarchy is "Carnegie" "Service Line" "sub-brand"

* CollegeXpress: This sub-brand should be used in conjunction with the parent brand and service line for Carnegie clients and prospects.
   * When referencing the service line, use "Student Lead Generation," "Lead Generation," or "Carnegie's Student Lead Generation service"
   * "Student Lead Generation, powered by CollegeXpress" can be used in marketing materials where appropriate and/or as a first reference in a narrative.
   * For the audience of students, parents, counselors, and high school administrators, CollegeXpress should be used alone or with a "a Carnegie company" reference in the footer text. Do not mention Lead Generation with these audiences.
* mStoner: This sub-brand should only be used in sales moments where the brand still has value. When used, it should be used in conjunction with the parent brand and service line.
   * When referencing the service line, use "Web Design + Development" or "Carnegie's Web Design + Development Service."

  * “Carnegie’s Web Development, powered by mStoner” can be used sparingly in sales materials.
  * Team reference: “Web team”
* Underscore: This sub-brand should be used in conjunction with the parent brand and service line.
  * When referencing the service line, use “Slate Optimization” or “Carnegie’s Slate Optimization service”
  * “Carnegie’s Slate Optimization, powered by Underscore” can be used in marketing materials where appropriate and/or as a first reference in a narrative. Example: “Carnegie’s Slate Optimization services are powered by Underscore, the largest dedicated Slate team in the country and Technolutions’ first Platinum Preferred Partner.”
  * Team references: “Slate Optimization team” or “Slate team”
* Maguire Associates: This sub-brand should only be used in sales moments where the brand still has value. When used, it should be used in conjunction with the parent brand and service line.
  * When referencing the service line, use “Financial Aid Optimization” or “Carnegie’s Financial Aid Optimization Service."
  * “Carnegie’s Financial Aid Optimization, powered by Maguire Assocaites” can be used sparingly in sales materials.
  * Team reference: “Financial Aid Optimization”

Phrases and terms to avoid
* Pow wow
* Ghetto (adjective)
* Spirit animal
* Low man on the totem pole
* Sacred cow
* Peanut gallery
* Please see complete Inclusive Language Workplace Guide for further guidance.

Contact information
* Street/Drive/Lane/Boulevard/etc. are spelled out unless space is a problem.
* Use periods in single-letter abbreviations of directions in street names (ex. 1700 W. 23rd Street, 1335 Fifth Avenue), but not two-letter directions (ex. 34 NW Broad Street).
* Telephone and fax numbers are written with dashes between numbers (ex. 800-654-9876).

* PO Box (no periods) is correct.
* ZIP Code is capitalized.
* Place a comma after city and before state, but not after state and before ZIP Code (ex. Westford, MA 01886).

Dollar amounts
* Use numbers with no cents (ex. $30, not $30.00) in general. However, cents are okay to include in budget tables.
* Use rounded numbers as deemed appropriate.

Ellipses
* For phrases or omitted words, use three periods with no spaces. (ex. More to come...)

Dashes
* Do not use spaces before or after an em dash, with the exception of using an em dash to show attribution when quoting someone in sidebar material—in which case, space on both sides.
* Do not use an em dash to begin a line.
* En dashes should be used where appropriate (often in a range of numbers) and should not be used in place of em dashes. See section on Hyphens for further information.

Gender pronouns
* Avoid using “he or she” and use the singular “they.”

Headers
* Employ title case when capitalizing words in headers/titles: capitalize letters that start the principal words; do not capitalize letters for prepositions, articles, or conjunctions unless it is the first or last word or it is four letters or more (i.e., With, From)
* Use downstyle/sentence case for subheads: capitalize only the first letter of the first word and proper nouns.
* Avoid terminal punctuation in headers.

Hyphens
* Do not use a hyphen when referring to millions (ex. $25 million athletic facility).
* Phrases consisting of an adverb and a verb or an adverb and an adjective are usually hyphenated unless the adverb ends in “ly” (ex. a well-dressed man, a happily married man).
* Hyphen in pre-professional, pre-med, pre-law, co-op, co-ed, start-up
* No hyphen in cocurricular, cooperative, coeducational, extracurricular, fastpitch, email, or nonprofit
* No hyphen in African American or similar terms describing ethnic or racial heritage, even when used as a modifier
* Use en dashes, not hyphens, in ranges throughout (ex. 15–17 students, page numbers 100–102, $10,000–$12,000, 14%–20%, 9:00 am–1:00 pm, etc.).
* Use hyphens in fractions, whether used as nouns or adjectives (ex. one-half, three-quarters, a two-thirds majority, three-quarters done).
* See section on Dashes for further information.

Internet terms
* Do not capitalize web, website, web page, internet, online, or email (unless beginning a sentence).
* Website addresses must be broken at the period or slash. No hyphenated breaks should appear at the end of a line unless it is part of the address itself. The same rule applies to email addresses, which may be broken only at a period or the “@” symbol. However, an effort should be made to keep web and email addresses on one line, unbroken.
* When writing a full web address: both “www” and “http://” should be omitted (ex. collegexpress.com; not www.collegexpress.com); however, if “www.” is required for the link to function, it must be included.
* Italicize in-line copy websites but not email addresses or Twitter accounts.
* CarnegieHigherEd.com (title case, roman, not italic) is preferred. However, always lowercase Carnegie email addresses (@carnegiehighered.com).

Italics
* Use for all of the following:
  * Internet addresses within copy (ex. privatecolleges.com); URLs used in an advertising context, as a design element, or as a proper noun do not need to be italicized (ex. He founded GoDaddy.com.).
  * Books

  * Magazines
  * Newspapers
  * TV programs
  * Movie titles
* May be used occasionally for emphasis within text.
* If a block of text is already in italics and there’s an element that would otherwise be italicized in the text, use roman text for that element (ex. Please visit fafsa.ed.gov for more information.).

Numbers
* Numbers nine and below are written out; 10 and above are numerals. Default to this rule whenever possible. However, numbers below 10 may be numerals if used in article titles or in tint boxes as part of a series of statistics or after bullets. Dollar amounts and percentages should also always be numerals, unless beginning a sentence.
* Numbers that begin a sentence in text are always written out. In tint boxes, numbers that begin a sentence may be numerals if necessary for space limitations.
* For plurals of numbers, simply add “s,” not “’s” (ex. 1890s, not 1890’s).
* Millions (or higher) should always be listed with the word “million,” applying the existing number rules (ex. one million people, $2 million, 14 million people).
* Use the en dash in all ranges of numbers (ex. 30–50, $45–$60, 14%–23%). However, if a range starts with a number below 10, use “to” (ex. five to 10 colleges).
* Year ranges should always be written out completely (ex. 2018–2019 academic year; not 2018–19).

Percentages
* Use numerals and the percent symbol for percentages unless the number begins a sentence within the text, in which case it should be spelled out (ex. He gave 100%. Seventy-five percent of our students receive financial aid.).
* In tint or fact boxes, numerals can be used at the beginning of sentences to conserve space or for consistency.
* Format ranges as such: 35%–40%.

Periods
* Do not use periods in the following:
  * Academic degrees: BS, BA, MBA, RN, etc.

  * Times: am, pm
  * Postscript: PS
  * Miscellaneous: DC, UN, US, etc. One exception is U.S. News & World Report (official title).
* Use a single space after a period; do not use double spaces (Scott!).

Quotes
* Use quotation marks for all of the following:
  * Direct quotations
  * Chapters of books
  * Magazine articles
  * Song titles
* Double quotation marks should be used around text, except for quotes within quotes, which require single quotes.
* Always use “curly” quotes.
* Guidelines for use of punctuation that is not part of a direct quote are as follows:
  * Commas and periods should be placed within quotation marks as needed (ex. She admits that at first she had been “introverted and more than a little conservative,” but she quickly overcame her shyness at SRU.).
  * Other punctuation, such as semicolons, colons, question marks, and exclamation points, should be placed outside of quotation marks unless they are a part of the quote (ex. He said that the school librarians are “helpful, knowledgeable, and kind”; however, the librarians could not say as much of the students.).
* Guidelines for use of punctuation that is part of a direct quote are as follows:
  * Keep any punctuation that is part of the direct quote within the quotation marks and complete sentence as usual (ex. In his poem “Inversnaid,” Gerard Manley Hopkins asks, “What would the world be, once bereft of wet and of wildness?”).

Semicolons
* Use semicolons for items within a series within items within a series (ex. She has worked in Seattle, Washington; Washington, DC; and Erie, Pennsylvania.).
* Sentences consisting of a series of complete simple sentences do not need to be separated by a semicolon (ex. He brought the ice cream, I brought the sprinkles, and Jenny brought the chocolate sauce.).

Spaces
* Use one space between sentences within body text.
* Use one space after colons.
* Use one space between states and ZIP Codes.
* When in doubt, ALWAYS use one space instead of two. (Don’t date yourself, Scott.)

Spellings
* Use “advisor” (not “adviser”).
* Use “theater” (not “theatre”). However, exceptions are made for official names of theaters (ex. Piccadilly Theatre) as well as for official titles of majors (ex. The College offers a Bachelor of Art in Theatre and Dramatic Arts).
* Use US spellings unless dealing with the official title of a place, program, etc. (“Programmes,” “travelling,” “enquiry,” and “honours” should be changed to their US equivalents.)
* Defer to Merriam-Webster (m-w.com) for spellings.

Time
* Do not use periods in am or pm.
* Include :00 (ex. 9:00 am, not 9 am).
* Include a space between time and abbreviation.
* Use en dashes to show a range of time, with no space on either side (i.e., 8:30 am–5:30 pm).
  * If a range of time starts and ends in the same 12-hour period, only mention that abbreviation once (ex: 9:00–10:00 am).
  * If a range starts in the morning and ends in the afternoon or at night (or vice versa), use both abbreviations (ex: 9:00am–12:00 pm).

TL;DR: ALWAYS use the serial comma and single spaces, don’t capitalize words unnecessarily, and do not use a hyphen in “email.”
Time Tracking
A Harvest Resource Guide for Managers

1

2

As a reminder,
WHY DO WE TRACK TIME?
Tracking our time provides us with data that drives decision-making at all levels of the company.
What does this data enable us to do?
Support Healthy Workloads: provides you as managers with an accurate understanding of how balanced or off-balanced someone's workload might be—and the ability to flag that through reporting and support our direct report(s) in resolving it.
Plan for Resources: ensures we have enough resources on our teams to deliver the work now and in the future.
Price our Work: equips us to know whether we are accurately pricing the work, using insights of recorded hours from prior projects for future alike projects.

WHAT IS TIME TRACKING DATA NOT BEING USED FOR?
No one is trying to "catch" anyone or hold the information against them. Harvest data is not used to judge individual contributions, or determine raises or promotions.

Weekly Management
1
3

It is your responsibility to ensure that your direct reports have all submitted their Harvest timesheets by noon EST on Monday.
Yes, the technical requirement is to submit the timesheet by end-of-day Friday, but we know that some employees add time over the weekend and some will simply forget on Friday afternoons.

YOUR ROLE IN WEEKLY TIMESHEET SUBMISSIONS
4
While the manager should always take note of team members that submit with extended work hours and be addressing regularly, the Operations team will also be monitoring employees who logged more than 40 hours for the previous week.
First, we need to confirm that non-exempt employees have not logged more than 40 hours.
Second, we note which employees have logged more than 45 hours for the previous week and who their managers are. If we see the same employees appearing on that list multiple weeks in a row, we'll send you a note to ensure you're aware of a potential workload imbalance.
If you're a senior leader, your name will not be flagged on the 45+ hours list, as we expect

you to be able to take the necessary steps to re-balance your workload.
WORKLOAD IMBALANCE FLAGGING

Submission Process
EVERY FRIDAY
All timesheets are due by end-of-day
You and your direct reports must submit your completed Harvest timesheet before you log off for the weekend. If you or your direct report take PTO on a Friday, be sure to submit your timesheet before you go on PTO.
EVERY MONDAY

5
9am local -
2pm EST
Manager reviews direct report timesheets (Time > Pending Approval) and Unsubmitted list (Time > Unsubmitted). Manager reaches out to any direct reports who have unsubmitted sheets or missing/concerning time records.
12pm EST
Email is sent by Operations team to any employees who have not submitted their Harvest timesheet
2pm EST
Any missing time is entered by employee
Email is sent to any employees with Harvest timesheets that are still unsubmitted
4pm EST
All concerning time records are resolved
All submitted Harvest timesheets are mass approved by Operations team

6
6
Weekly Manager To Do List:

1. On Monday morning, please log in to Harvest and confirm that all your direct reports have submitted their timesheets.
Navigate to “Unsubmitted” tab within the “Time” page to view anyone from your team who

has not yet submitted.
Work with all direct reports who have not yet submitted to do so before 2pm EST.

7
Weekly Manager To Do List:

2. For those who have submitted their timesheets, please note the total hours logged per direct report.
Navigate to the “Pending Approval” tab within the “Time” page.
Maya Greenfield
Legend Smith
Ryan Bruno

8
8
!!
Weekly Manager To Do List:

2a. Please note any employee who has worked more than 45 hours the previous week.
If you notice several weeks in a row of 45+ hours, please make a note to talk to the employee about their workload and ideas for getting it back down closer to 40 hours.

9
9
Weekly Manager To Do List:

2b. Please note any employee who appears to have an incomplete timesheet. If a full-time employee’s weekly total is not close to 40 hours, please work to understand why this is the case.
If a timesheet is considered complete by the employee and is not close to 40 hours, that person should log time to “Carnegie bench” to close the gap. This is okay! This will enable you and your direct report to find ways to support others.

New Hires
2
10

Each new hire will receive an invite from notifications@harvestapp.com to join the Carnegie workspace in Harvest prior to their first day of work. They are welcome to sign in before they start or on their first day.

Seeing as these invitations expire after seven days, please ensure that your new hire logs in to Harvest on their first day and adds time to their timesheet. Likely, their first day will be filled mostly—if not entirely—with time on non-billable projects such as “General Company Admin,” “Internal Meetings,” and “Team and Employee Development.”

New hires are required to submit their timesheet on Fridays by end-of-day just like everyone else. It’s your responsibility to ensure this happens.

DAY ONE

11

Day One Manager To Do List:

Confirm that your new hire has located their invitation to Harvest and has successfully logged in.

Share the Harvest Resource Guide with your new hire.

Help your new hire log time to their Harvest timesheet based on what they did on their first day.

Share any time-tracking strategies you’ve found helpful in ensuring an accurate and complete time record
each day.

Week One Manager To Do List:

Confirm that your new hire has submitted their timesheet by end-of-day Friday and that it represents all time worked that week.

The default permissions settings for Harvest users are as follows:

Please also reference the image of permissions options to the right.

Everyone: Manager-level access, assigned as a manager to all current and future projects.

Account Management team: Manager-level access with all four boxes checked.

People Managers: Manager-level access with third box checked.

Top Business Unit Leaders: Manager-level access with third and fourth boxes checked (each instance must be approved by Division Leader).

PERMISSIONS

12

Team Reporting

3

13

Navigate to the “Reports” page.
The Clients tab gives a you name-by-name list of our clients and how much time is spent with each. This is great for tracking over/under servicing and client concentration.
The Projects tab will display how much time has been spent on each project.
The Tasks tab reveals how much of our time is spent on each “task” in a given time period. The billable hours percentage by task is helpful for identifying appropriate averages for your team members and/or benchmarks for shifting that percentage.
The Team tab shows the time spent a on a personnel basis. This shows you who’s pulling the greatest number of hours, and who could use a greater workload.
OVERVIEW
14
You can export all these reports to Excel or CSV for deeper analysis. The Detailed Report icon next to each time total will break down even more detail for each category.
From there, use Pivot Tables to easily sort the data.
DRILLING DOWN
Note! Fixed fee projects are not automatically included into billable amounts in Harvest. In order to have accurate reporting, please check the box at the top of the page to include them.

15
How many hours are our direct reports supposed to have logged each week?
Full-time employees are expected to work 40 hours each week, however, each person may not have exactly 40 hours logged in Harvest. That person should have a reasonable number of hours logged each week and a per-week average of about 40 hours when you look at your month.

16
16
Week 1: 26.45 hours
Week 2: 35.00 hours
Week 3: 41.00 hours
Week 4: 34.00 hours
AVG PER WEEK: 34.11 HOURS
Week 1: 38.00 hours
Week 2: 39.80 hours
Week 3: 41.30 hours

Week 4: 40.25 hours
AVG PER WEEK: 39.84 HOURS
Scenario 1
Scenario 2
Scenario 3
✓
X
The hours logged on Weeks 1, 2, and 4 are not reasonably complete and the per-week average over the course of the month is also not close to
40 hrs/week.
Great!
Any one of these weeks by themselves might be fine, but 37 hrs/week should not occur as a trend and should be addressed by you as the manager. The per-week average at the end of the month is not close enough to 40 hrs/week.
Week 1: 37.15 hours
Week 2: 37.00 hours
Week 3: 37.00 hours
Week 4: 37.50 hours
AVG PER WEEK: 37.16 HOURS
Week 1: 22.00 hours
Week 2: 42.80 hours
Week 3: 56.70 hours
Week 4: 34.25 hours
AVG PER WEEK: 38.94 HOURS
Scenario 4
X
X
While the per-week average at the end of the month is close to 40 hours, the hours logged on Weeks 1 and 4 are not reasonably complete. Additionally, while complete and submissible, the hours logged on Week 3 are concerning.

17
17
Managing to Billable Goals
Conversations with Direct Reports
Your conversations should continue to focus on creative problem solving, team work, and achieving client success.
If you notice that the billable/non-billable time split is not lining up with the categories

we’ve outlined, you should seek to understand if something is getting in the way of allowing your direct report to focus on their work OR if our billable expectations for their role are not realistic. Lead with curiosity always: “I noticed ____. Tell me more.”
That said, harvest should help you be aware of patterns over time. Don’t jump to any conclusions with one or two weeks of data.
Billable Percentage Goals
Each role at Carnegie that tracks time has an associated billable percentage goal. There are five goal categories:
75%   (30/40 hours per week)
60%   (24/40 hours per week)
35%   (14/40 hours per week)
15%   (6/40 hours per week)
0%
These goals are meant to create alignment and eliminate confusion. Our time tracking data and the billable/non-billable splits will help us learn and grow, but accuracy and completeness is always the number one goal.
See the billable goal per role here.

Frequently Asked Questions
4

(BY MANAGERS)

Carnegie’s Talent Acquisition team will notify Carnegie’s Finance team each time a new hire accepts a job offer and will provide the following information:
Name
Start date
Position
Salary
Manager
Direct reports (if any)
Carnegie’s finance team uses this information to invite the new hire to Harvest and add the appropriate Harvest role, cost rate, permissions, and Assigned People. They’ll also add the new hire to your Assigned People list.
If you are not able to see your new hire’s activity on their first day, please contact Jorie Antuma in Operations.
How does my new hire receive an invitation to join Harvest?

Regardless of reason for leaving, Carnegie's Human Resources team will notify Carnegie's Finance team to inform them of the employee's last day of employment. The Finance team will archive the employee's Harvest account after that day.
In archiving their account, the hours/costs that were attributed to the employee on any project will be preserved.
What happens when someone on my team leaves?
Carnegie's Finance runs a weekly report to catch all employee changes in Insperity. As long as Human Resources team is aware of your team member's promotion/raise/title change, they'll update Insperity and Finance will see the change. They'll then make the appropriate changes in Harvest to cost rate, permissions, and/or Harvest role.
What happens when someone on my team gets a promotion or a raise? Team or title change?

If you are actively problem solving a client scenario that time can be billable (if it's significant enough). Otherwise your time should be logged to the non-billable project "INT - Management."
How do I log 1:1s with my direct reports?
While this is obviously not an ideal-case scenario, you can submit their timesheet for them (and even add 8 hours of PTO to the non-billable "OOO - PTO" project for them as well).
To do so, select the "Unsubmitted tab" on the "Time" page and choose the "View timesheet" button next to the direct report who is on PTO. From there, you can choose the "Submit week for approval" button at the bottom right of the page, or choose "+ Add row" to add 8 hours of PTO to their timesheet.
What happens if one of my direct reports did not submit their timesheet prior to going on PTO?
20
If you are actively problem solving a client scenario that time can be billable (if it's significant enough). Otherwise their time should be logged to the non-billable project "INT - Internal Meetings"
How should my direct report log our 1:1s?

A request from the divisional leader can be sent to ops@carnegiehighered.com with the contractor's Carnegie email address. Note: a Contractor cannot be added to Harvest if they do not have a Carnegie email address.
How do I invite contractors into Harvest?
Please use this link to submit any/all software-related feedback, suggestions, and/or enhancement/integration requests.
Where can I submit feedback or suggestions about Harvest?

Parental Leave Process

Carnegie will provide the following parental leave benefits to full-time employees (30 hours or more) that have been employed for a minimum of three (3) months.

A Parental Leave Notification Form should be submitted to Human Resources at least 30 days prior to intended leave. Upon receipt of the leave notification, Human Resources will contact you with additional information. Parental leave should be requested through Insperity's time and attendance module using the pay code "Parental Leave". For birth mothers, the Business Office will submit your leave request.

Disability and/or paid family leave benefits provided by state programs are administered by the state, and not Carnegie. If you work in a state with a disability program or paid family leave benefit, information on filing a claim with that state will be included in the Leave of Absence Summary you receive from Insperity along with the Taking a Leave of Absence Simplified booklet. Human Resources will be able to provide additional information on whether you qualify for any state programs.

Indicate Carnegie as your employer of record when filing a state claim, and that you are receiving no other pay. Employer Identification Number (EIN) is 85-3168237.

To access your leave record, login to Insperity and select the Leave of Absence "Access Now" button on the right-side panel.
If you are adding the new baby to your insurance plan, this needs to be done within 60 days of the baby's birth and can be processed online via Insperity as a Mid-Year Change.

**We love to welcome new members to the Carnegie family.

Let us know your baby's name so we can send a welcome gift! **

Paid Birth and Recovery Leave
Paid Birth and Recovery Leave (PBRL) must be taken immediately following the birth of the child. PBRL will run concurrently with Family Medical Leave Act (FMLA) leave and/or state disability leave, as applicable. PBRL is paid as supplemental compensation for employees eligible for Carnegie's offered disability plan and, if applicable, state disability leave. The employee's payment during this time will first be made by state disability leave, then short-term disability, with the balance to be paid by Carnegie, not to exceed 100% of the employee's weekly pay. The employee is responsible for required documentation, enrollment, and management of all programs. Employees eligible for PBRL may also be eligible for Paid Parental Leave, if applicable, after exhausting PBRL. In other words, an employee is not entitled to PBRL and Paid Parental Leave at the same time.
Short-term disability (STD) is offered by NYLife and pays 60% of your weekly salary for either four (4) weeks or six (6) weeks. If you receive benefits from a state program any benefits payable from NYLife life may be reduced.

Thirty days prior to the expected due date, Human Resources will process your leave of absence with Insperity. A personalized Leave of Absence Summary will be prepared for you advising you of your rights and responsibilities along with the Taking a Leave of Absence Simplified booklet and mailed to your home address.
Prior to and after giving birth there are important steps to follow to ensure the timely payment of your maternity leave benefits. The Paid Birth and Recovery Checklist highlights some of these steps.

Paid Parental Leave
Carnegie will provide up to six (6) weeks of Paid Parental Leave in a 12-month period to eligible employees. For birthing mothers, Paid Birth and Recovery Leave may be followed by Paid Parental Leave for a total of up to 12 weeks paid leave in a 12-month period. To be eligible for benefits under the Paid Parental Leave policy, employees must meet all three criteria below:

* Be a full-time, regular employee working at least 30 hours per week (part-time employees, temporary employees, and interns are not eligible for this benefit).
* Be the:
  * birth mother of the child; or

  * spouse or domestic partner of a person who gives birth to a child; or
  * adopting parent of a child under 18 years old; or
  * adopting parent of a person under 23 years old who is mentally or physically disabled; or
  * caregiver of a child placed pursuant to court order.
* Have continuous employment at Carnegie for at least 90 days as of the child's birth/adoption date.

Parental leave will run concurrently with any other state or federally protected leaves to which an employee is entitled to and will supplement any paid leave required by the state, not to exceed 100% of the employee's weekly pay. The employee is responsible for required documentation, enrollment, and management of any state programs.

Carnegie is committed to supporting you throughout this very exciting time. Please contact the Human Resource office if you have any questions on this process.

Client Relationship Escalation Protocol

* Team member elevates concern to supervisor
* Supervisor asks for written documentation about the concern; if it involves specific instances between client and Carnegie, those are spelled out with date/time/persons; email summary sufficient
* Supervisor contacts Sales/Client Success Lead and AM Divisional Lead; schedules meeting to discuss concerns; walks through documentation; determines level of urgency and alarm, as well as recommendation for addressing the concern. This will be done with 48 hours of receipt of written complaint
  * Potential solutions (in order of escalation)
    1. Have a conversation with the concerned team member; reaffirm our commitment to their health and happiness; discuss tactics for navigating the client relationship they might be able to employ in their future client interactions
    2. Remove concerned team member from the account; replace with another team member
    3. Client Success Lead schedules a mtg (zoom or phone call.. email will not suffice) with primary client sponsor to address the concerns and ask for adjusted behavior
    4. Client Success Lead schedules a mtg (zoom or phone call.. email will not suffice) with primary client sponsor to ask for elevated solution if behavior adjustment not appropriate
    5. Client Success Lead schedules a mtg (zoom or phone call.. email will not suffice) with primary client sponsor to let them know that Carnegie will be discontinuing the relationship altogether
* All complaints to be shared with client success leadership (Eric Page and Kayla Gaier) for visibility

* If the recommended solution is iv. or v., Client Success Lead and AM Divisional Lead report the circumstance and recommended solution to Eric and Kayla and wait for feedback.
* Eric and Kayla to discuss, affirm or push back on recommendation. Eric will alert Divisional Leadership team to the situation. Eric to field feedback and take any adjustments back to Kayla, Client Success Lead, and AM Divisional Lead.
* Once course of action is determined, supervisor will meet with team to share course of action.

Fathom Resource Guide

AI CALL TRANSCRIPTION TOOL

1

Never take notes on a Zoom call again!

2

benefits

Transcribe calls with highlighting, bookmarking & action items

Creates a high-level AI summary of the full call

Integrates with slack - you can share video snippets within slack

Action items can be created during the call & copied to Asana

Download call recordings, zoom chats, snippets & see attendance

1

2

3

4

5

03

And it’s so easy to use!

4

HOW TO USE/BEST PRACTICES

You can use this Invite code to log into Fathom

Fathom has great video trainings & documented tutorials that highlight everything you need to know:

Fathom Help page

Fathom’s reference guide

Fathom's test call - training
Fathom quick start guide
Best Practice - Have one person from our team use Fathom and disperse call notes/recordings afterwards
Notification banner must stay on

TIPS
To avoid fathom saying "danielle's notetaker" and instead displaying image with " is recording this call for notetaking purposes" you can start the recorder and pause and then re-start
Note - this will only automatically display properly if you are the first person admitted into the meeting

SUPPORT
Contact Fathom support for any questions: help@fathom.video
Fathom Help Page

Thank You!
Any questions, feel free to reach out to Ops

GLOSSARY
ENROLLMENT & MARKETING TERMS

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
A

Academic year: Annual period during which a student attends and receives formal instruction at a college or university, typically from August or September to May or June. The academic year may be divided into semesters, trimesters, quarters, or other calendars.

Acceptance: Not to be confused with enrollment, acceptance is the decision that a prospective student is eligible to enroll in a particular school.

Accredited: Official recognition that a college or university meets the standards of a regional or national association. Although international students are not required to attend an accredited college or university in the United States, employers, other schools, and governments worldwide often only recognize degrees from accredited schools.

ACs: Admissions Counselors.

ACT (American College Test): A standardized college entrance exam administered by the American College Testing Program.

Admitted student/Admit: A student who has been accepted into a college or university and is now eligible to enroll.

Alma mater: The school from which an individual has graduated.

Alum: A former student who has graduated from a school.

Applicant: A person who has asked to be accepted to a college or university by filling out and sending in an application.

App stat: An identifier that reveals where a student resides within the recruitment cycle. The Slate (and Carnegie's preferred) naming convention would be: Prospect, Inquiry, Applicant, Admit, Deposited/Matriculant. As a student moves from one status to another, they convert. Many institutions look for year-over-year increases with conversions.

Attrition: The number of students who leave an educational program before they have finished, i.e., before they have graduated. To find a school's attrition rate, divide the number of students who have left the school by its total number of students, and multiply the result by 100.

Automation: The process of setting rules and parameters (within the CRM) to send a singular (or schedule a series of) communication(s) to targeted populations within a desired time frame.

B

C

Carnegie Classifications: Time-specific snapshots of institutional attributes (characteristics) and behavior-based data.

CMS (Content Management System): A piece of software that allows users to create, edit, show, and hide, and otherwise modify content on a website without the need to write code.

Committee review: In a committee review, admissions officers will discuss applicants' qualifications, personal qualities, values fit, extracurricular interests, special circumstances, and other criteria that may affect their acceptance.

Common application/Common app: A standard application form that is accepted by more than 750 member colleges and universities for admissions. Students can complete the form online or in print and submit copies to any of the participating colleges, rather than filling out individual forms for each school. However, international students will typically need to submit additional application materials as uniquely required by each college. Accepting the common application tends to increase application volume for a school but can decrease yield, as applicants apply to a larger number of schools overall.

Communication plan: A communication plan is a road map for delivering an institution's messages to the people who need to hear them, such as students, their families, alumni, donors, faculty, and staff.

Communication flow/Commflow: An integrated outreach plan that is inclusive of metrics, aware of ports of entry, and throughput consistent messaging. Collateral and communication within a flow should include digital, email, print, video, voice, social, etc. integrated within the CRM.

Campaign: Collective and coordinated communications content based on a clearly defined theme, timeline, or targeted outcome.

Continuous enrollment (aka evergreen contracts or perpetual enrollment): An enrollment philosophy and practice in which once a student enrolls in a school, they remain enrolled until they either graduate or deliberately un-enroll. Continuous enrollment helps prevent student attrition by removing the annual obstacle of re-enrolling.

Conversion rate: The number of potential families or inquiries who fully enroll at a school. The rate is found by dividing the number of enrolled students by the number of total interested or prospective families. Conversion rate may also apply to the number of students moving from one status in the recruitment process to another.

Convert: The movement of a student from one status in the recruitment cycle to another.

The Slate (and Carnegie's preferred) naming convention is: Prospect, Inquiry, Applicant, Admit, Deposited/Matriculant. Many institutions look for year-over-year increases with conversions.

CRM (Content/Customer Relationship Management): An integrated set of data tables for managing all of a school's relationships and interactions with families and prospective families. These school admissions software tools are designed to simplify tedious record-keeping, making an easily edited central repository for student and prospect information. It can be used for reporting, communications, territory management, custom and personalized messaging, and segmentation. Slate is the leading CRM in higher education (others include SalesForce, Target X).

Culture shock: Feelings of uncertainty, confusion or anxiety that can occur when adjusting to a new country and culture that may be very different from one's own.

D

Dean: The head of a division of a college or university.

Deferral/Deferred admission: A school's act of postponing a student's application for early decision or early action, so that it will be considered along with the rest of the regular applicant group. A deferral can also refer to a student's act of postponing enrollment for one year, if the school agrees.

Deposit: Indicates a payment made by the student after acceptance to a university and is often the first step to becoming an enrolled student. There are different deposit types and methods. One secures a spot in the academic class for the student. Some are housing deposits and gauge how many students will be coming in the fall. Some universities do not require a deposit at all.

Demographics: Descriptors that help define and interpret attributes associated with a person (student) or a group of people (market, class, cohort) that, although they can change, tend to be lasting or change slowly over time. These would include identity markers like gender, religious affiliation, socioeconomic status (SES), political views, region, etc.

Denial/Denied: The rejection of a prospective student's application for admission.

Department: A division of a school, made up of faculty and support staff, that gives instruction in a particular field of study, such as the history department.

Deposited/Matriculated student: A student who has enrolled in a program of study at a college or university, with the intention of earning a degree.

Discipline: An area of academic study.

Draft applicant/Draft application: An applicant who's in the process of completing their application form.

Drip campaigns: Similar to automation, a drip campaign allows for an audience to receive multiple touchpoints within a specified timeframe, or communications based upon audience engagement.

E

Early action: A program offered by some colleges and universities that allows students to submit their applications early, typically in November or December, and receive decisions early, usually in mid- or late December. Students are not required to accept the admissions offer and have until May 1 to decide. Although some schools allow international students to apply via early action, applicants who request financial aid may not receive a decision any earlier than those who apply through the regular decision process.

Early decision: A program offered by some colleges and universities that allows students to submit an application to their top-choice school early, typically in November or December, and receive the decision early, usually in mid- or late December. If accepted, students are required to enroll at that school and withdraw all applications to other schools. Although some schools allow international students to apply via early decision, applicants who apply for financial aid may not receive a decision any earlier than those who apply through the regular decision process.

Econometric Aid Model: A model that considers "leveraging" those characteristics a student possesses that mirror the desired goals of an institution. As such, they generally receive financial support and funding accordingly. This differs from "discounting" which is generally a practice of offering students similar amounts of financial aid. Two primary ways financial aid is configured is through need (determined by family income through the FAFSA) or merit (GPA, test scores, or other ability).

Enrolled: An enrolled student has completed all admission and registration requirements and can begin attending classes.

Enrollment Funnel: Metaphor used to categorize the stages prospective students move through on their path to enrolling at a university. The funnel has historically functioned as a useful model for enrollment planners seeking to develop the best recruitment strategies for each stage of the admissions process.

F

FAFSA (Free Application for Federal Student Aid): Application used by US citizens and permanent residents to apply for financial aid from US federal and state governments. International students are not eligible for US government aid, but schools may ask international students to submit a FAFSA to determine financial need. (Note: A Social Security number is required to complete the FAFSA.)

Feeder school: A school from which many or most students progress to a particular higher-level educational institution.

Financial aid (FA): All types of money offered to a student to help pay tuition, fees, and other educational expenses. This can include loans, grants, scholarships, assistantships, fellowships, and work-study jobs.

First-Time Freshman (FTF): Usually seniors in high school or students who have waited a semester/year to apply but have not attended another institution as a full-time student. Dual-enrollment courses are usually taken during the junior or senior years in high school and do not count as being enrolled as a full-time student.

First-Time Transfer (FTT): A student switching institutions after completing at least a semester at another institution. This will be the student's first time at the new institution.

Full-time student: A student who is enrolled at a college or university and is taking at least the minimum number of credits required by the school for a full course load.

G

Ghost applications (also known as a stealth applicant or shadow applicant): An application from a prospective student who does not first pass through the traditional steps of inquiry, such as an open house or admissions event attendance. These students first become known to a school when they fill out an online application.

GMAT (Graduate Management Admission Test): A standardized graduate business school entrance exam administered by the nonprofit Graduate Management Admission Council, which measures verbal, quantitative,and analytical writing skills. Some business schools accept either the GMAT or GRE. In June 2012, the GMAT incorporated an integrated reasoning section designed to assess how applicants analyze different types of information at once.

Graduation rates: Measurement of the percentage of first-time, full-time undergraduate students who complete their program at the same institution within a specified period of time.

Grant: A type of financial aid that consists of an amount of free money given to a student, often by the federal or a state government, a company, a school or a charity. A grant does not have to be repaid. "Grant" is often used interchangeably with "scholarship."

GRE (Graduate Record Examination): A standardized graduate school entrance exam administered by the nonprofit Educational Testing Service (ETS), which measures verbal, quantitative, and analytical writing skills.

GTP (Gateway to Prep): A website that allows online applications to multiple schools at once.

H

Higher education: Any type of education that takes place after high school, or secondary school. They can include: Community College (CC), Technical School (TS), 2-year college, 4-yr college/university, etc.

HSPT (High School Placement Test): A standardized test used by many high schools across the United States to aid admissions, scholarship selection, and curriculum placement decisions.

I

IELTS (International English Language Testing System): A standardized test that measures English-language proficiency in reading, listening, speaking, and writing. Many US colleges and universities require nonnative English speakers to submit IELTS or TOEFL scores as part of the admissions process.

Independent study: An academic course that allows students to earn credit for work done outside of the normal classroom setting. The reading or research assignment is usually designed by the students themselves or with the help of a faculty member, who monitors the progress.

Influencers: When cultivating a market, influencers may or may not have a direct influence on reputation, the application process, or a participant in the enrollment process. Often influencers include parents, guidance counselors, community leaders, alumni, etc.

In-house app: A comprehensive form that allows a student to apply for admission to a particular university. Typically, universities participate in the Common Application and/or a state-designated common application. An in-house application allows a student to apply directly with the institution rather than a third party.

Inquiry: The naming convention for an application status (consistent with Slate) that qualifies a Prospect to an Inquiry when some sort of action or conversion (form submission, registration, etc.) short of an application takes place. It is an intermediate qualification between Prospect and Applicant.

Interdisciplinary: Can refer to how different departments, majors, or disciplines work together and can also reference a major called "Interdisciplinary Studies" or similar.

International student adviser: A school official who assists international students, scholars, and faculty with matters including orientation, visas, income taxes, insurance, and academic and government rules, among other areas.

Interview: As part of the application process, the interview can help determine whether a prospective student is a good fit for the school and vice versa, as well as giving a glimpse of their academic and extracurricular interests, learning style, and personality.

J

K

KPI: Stands for key performance indicator, a quantifiable measure of performance over time for a specific objective. KPIs provide targets for teams to shoot for, milestones to gauge progress, and insights that help people (both the vendor and the school itself) make better decisions.

L

Legacy: A legacy applicant or legacy student is an applicant or student related to a family member who has attended a particular school. Some schools may grant favored admission status or set aside specific tuition assistance dollars for these students.

M

Matriculated/Deposited student: A student who has enrolled in a program of study at a college or university, with the intention of earning a degree.

Matriculate: To enroll in a program of study at a college or university, with the intention of earning a degree.

MCAT (Medical College Admission Test): A standardized US medical school entrance exam administered by the nonprofit Association of American Medical Colleges, which measures verbal reasoning and writing skills and physical and biological sciences knowledge.

Melt: When a prospective student enrolls and pays an academic deposit but then cancels their deposit or doesn't appear in the fall to begin the school year. Melt can also be used in reference to event attendance.

Merit aid/Merit scholarships: A type of financial aid awarded by a college or university to students who have demonstrated special academic ability or talents, regardless of their financial need. Most merit aid has specific requirements if students want to continue to receive it, such as maintaining a certain GPA.

Messaging pillars: The key messages that make up a university's brand story or brand platform. They are usually statements of value that they believe sets the institution apart. Campus communicators are asked to craft their communications in ways that complement and echo these messaging pillars.

N

Need-based financial aid: Financial aid that is awarded to students due to their financial inability to pay the full cost of attending a specific college or university, rather than specifically because of their grades or other merit.

Need-blind admissions: A college or university's policy of accepting or declining applications without considering an applicant's financial circumstances. This policy does not necessarily mean that these schools will offer enough financial aid to meet a student's full need. Only a handful of US colleges or universities offer need-blind admissions to international students.

Net price calculator: An online tool that allows students and families to calculate a personalized estimate of the cost of a specific college or university, after taking into account any scholarships or need-based financial aid that an applicant would receive.

Net tuition revenue: The amount of revenue a school receives from tuition and fees, minus any institutional aid a school provides to students to help them afford the cost of attendance. Tracking net tuition revenue can help a school determine whether it needs to enroll more or fewer partial pay students in order to cover operating expenses.

Non-matriculated: A student in a college or university's courses, but not in a program of study leading to a degree.

Nonresident: A student who does not meet a state's residence requirements. A college or university may have different tuition costs and admissions policies for residents versus nonresidents. In most cases, international students are considered nonresidents. A "nonresident alien" is a person who is not a US citizen and is in the country on a temporary basis.

Nontraditional: Oftentimes denoting those students meeting any of the following characteristics: delayed enrollment into postsecondary education; attends college part-time; works full time; is financially independent for financial aid purposes; has dependents other than a spouse; is a single parent; or does not have a high school diploma.

Notification date: The date on which prospective families receive admissions decisions from a school. Although this is sometimes called Decision Day, it is not necessarily the date on which admissions decisions are actually made.

O

Open admissions/enrollment: A college or university's policy of accepting all students who have completed high school, regardless of their grades or test scores, until all spaces are filled. Most community colleges have an open admissions policy, including for international students.

Orientation: A college or university's official process of welcoming new, accepted students to campus and providing them with information and policies before classes begin, usually as a half, full, or multi-day event. They often occur throughout the summer and right before classes start. Many colleges and graduate schools offer a separate orientation just for international students to cover topics such as how to follow immigration and visa regulations, set up a US bank account, and handle culture shock.

P

Partial pay: Partial pay students pay tuition, but not the full sticker price of attending a school. In particular, partial pay students receive some amount of financial aid from a school directly and therefore do not generate net tuition revenue equal to the cost of their tuition. Accepting partial pay students can be advantageous, because the net tuition revenue they generate is positive overall, and/or because their skills, talents, and academic excellence enhance the prestige or mission of the school.

Part-time student: A student who is enrolled at a college or university but is not taking the minimum number of credits required for a full course load.

Priority date: The date by which an application must be received in order to be given full consideration. This can apply to admissions, financial aid, and on-campus housing. After the priority date passes, applications may be considered on a case-by-case or first-come-first-served basis.

Prospect: Someone who has a need, desire, or interest in something offered. For a school, a prospect would be a student or family who is interested in attending and enrolling that school.

Provost: The senior academic officer of a college or university who typically oversees all academic policies and curriculum-related matters.

Psychographics: The study and classification of people according to their attitudes, aspirations, and other psychological criteria, especially in market research.

Q

R

Regional Recruiters (RRs): Admissions Counselors who live in their territories.

Registrar: The college or university official who is responsible for registering students and keeping their academic records, such as transcripts.

Registration: Whereas enrollment is the process of granting a student a seat in the incoming class, registration is the actual paperwork—even if that paper is digital—of obtaining identity documents, immunization records, any remaining placement exam results, and similar records, and determining a student's class schedule.

Regular decision: An admissions process used by colleges and universities that typically requires applicants to submit their materials by January 1; an admissions decision is generally received by April 1, and if admitted, students usually have until May 1 to respond to the offer. The majority of applicants are evaluated during regular decision, rather than early action and early decision.

Reporting: Understanding attribution and engagement by population, touchpoint, or channel to discover which communications, demographics, and segments lead to desired interaction and application status outcomes.

Residential Life/Res Life/Res Halls (no longer called dorms): The place where students live on campus and include intentional community building programming designed by the school.

Retention: The rate at which students return the following academic year or remain enrolled in a school.

Revisit Day: A day for accepted students to come back to the school and visit. This event gives a school another chance to interact with students and allows students to envision themselves at the school, knowing they were accepted.

ROI (Return on Investment): The ratio between spending on an initiative and the revenue it generates. It is a measure of the success of a campaign, such as an awareness or recruitment campaign for a school. An ROI ratio of 5:1 is generally considered strong for a recruitment campaign.

Rolling admissions: An admissions process used by some colleges and universities in which each application is considered as soon as all the required materials have been received, rather than by a specific deadline. Colleges and universities with this policy will make decisions as applications are received until all spaces are filled. This can be a helpful policy for a school that faces low enrollment to raise its application rate.
S

SAT: A standardized college entrance exam administered by the Educational Testing Service (ETS) on behalf of the nonprofit College Board, which measures reading, writing, and math skills.

Search: Generally refers to the initial outreach (typically inclusive of a set amount of emails and a print piece) to a prospective student audience. Categories include Sophomore and Junior Search as well as Senior Search. Search campaigns are typically designed to reach out to high volumes of students in an effort to convert awareness into interest. Many institutions hire outside firms to manage their search efforts.

Segmentation: Identifying unique populations within an audience to whom an institution intentionally sends variable content/messaging.

Selectivity: A measurement of the percentage of students who apply to a school who are admitted. The lower the percentage, the more selective the school is.

Semesters: Periods of study that divide the academic year into two equal segments of approximately 15 to 18 weeks each. Some schools also offer a shorter summer semester beyond the traditional academic year.

Shadow Day: An opportunity to entice prospective students and their families with a taste of what student life is like at a school. Prospective students may have the opportunity to attend classes, eat lunch in the cafeteria, and get to know others at the school. Shadow Days also give schools a chance to determine whether a prospective student is a good fit for the mission and culture of the school and whether they could excel there.

SIS (Student Information System): A student information system is a software application that allows schools to manage student data. This includes uses like registering students for classes, recording grades, storing and updating transcripts, tracking attendance, and other information management functions.

Slate: The leading CRM platform in higher education, used for admissions and enrollment management, outreach and communications, travel management, online applications, online reading, student success and retention, and alumni and donor engagement.

Standardized tests: Exams, such as the SAT, ACT and GRE, which measure knowledge and skills and are designed to be consistent in how they are administered and scored. Standardized tests are intended to help admissions officials compare students who come from different backgrounds.

STEM: The collective subjects of science, technology, engineering, and math.

Student population: Student population or type for reporting purposes. These populations might include new freshmen, transfer, continuing, etc.

T

Term: The first semester that a student will enroll at a university. Students can enroll in either the fall, spring, or summer terms. For example, Spring 2020, Fall 2021. In Banner, these will be recorded using a number (Fall 2019 – 201908; Spring 2019 – 201901; Summer 2019 – 201905).

TOEFL (Test of English as a Foreign Language): A standardized exam administered by the nonprofit Educational Testing Service (ETS), which measures English-language proficiency in reading, listening, speaking, and writing. Many US colleges and universities require nonnative English speakers to take the TOEFL or IELTS and submit their scores as part of the admissions process.

Tour: The school tour is an excellent opportunity to share a school's unique value proposition with prospective students and their families. By guiding a visit through its campus, a school can showcase the educational programs, opportunities for fun, play, and social interaction, campus diversity, and culture of the school in a way that allows prospective students to picture themselves there.

Transfer credit: Credit granted toward a degree on the basis of studies completed at another college or university. For instance, students who transfer from a community college to a four-year college may earn some transfer credit.

Transfer student: A transfer student who has un-enrolled from one school to enroll in a new one.

Tuition: An amount of money charged by a school per term, per course, or per credit, in exchange for instruction and training. Tuition generally does not include the cost of textbooks, room and board, and other fees.

Tuition assistance: Any financial aid, either from the school itself, vouchers, government or nonprofit grants or scholarships, or other sources, that helps families to pay the cost of tuition.

U

Undergraduate student/undergraduate studies: A student enrolled in a two-year or four-year study program at a college or university after graduation from high school, leading to an associate or bachelor's degree.

UVPs: Unique Value Propositions are those differentiators a school believes sets them apart. It's in essence, the unique value they believe they offer their students and that sets them apart from competitors.

V

W

Waitlist: A list of qualified applicants to a school who may be offered admission if there is space available after all admitted students have made their decisions. Being on a waitlist does not guarantee eventual admission, so some students may choose not to remain on the list, particularly if the school is not their first choice.

Waitlisted: Desirable schools will often be faced with more qualified applicants than available seats. The waitlist is a means of keeping additional qualified applicants on hold until a school knows if all of the accepted applicants will enroll. Waitlisted students may be accepted later if previously accepted applicants decide not to attend. A waitlist can help mitigate a shortfall in enrollment numbers due to low or unpredictable yield.

Withdraw: To formally stop participating in a course or attending a university.

X

Y

Yield: A measure of the number of students accepted from an applicant pool who actually attend the school. Calculate yield by dividing the number of accepted students by the number of students who choose to attend. Yield can also measure the percent of students who complete next steps in the enrollment process (e.g., application yield, deposit yield).

Z

Inclusive Workplace Language Guide

At Carnegie, we all believe in the power of human connection. We've seen the ways it can drastically change our client's approach to their work, completely reframe their strategy, and help them achieve big goals. But "human connection," isn't a marketing buzzword, it's the foundation of who we are in and out of the workplace.

While human connection is a powerful force, it can also be damaged—-intentionally or unintentionally—by our actions and/or choice of words. Words are containers for power. They can uplift, inspire, show love, affirm. They can also do the opposite.

The below words and phrases can easily wiggle into workplace lexicon, however, there are many alternatives that can be used that do not carry additional meaning. This isn't a comprehensive list—if you have other suggestions for additions, please reach out to the

Team Care DEI team.

One of the great things about this team is how we inspire and uplift each other. Seeking to understand the origins of the below list of words/phrases is just one way we can do that.

Pow Wow
Pow Wows are social gatherings for ceremonial and celebratory purposes, which are conducted under strict protocol by Indigenous peoples. Using this phrase to refer to quick business meetings denigrates the long, cultural significance of the pow wow. Source: Indigenous Corporate Training Inc.

Alternatives: Meeting, Chat, Touch Base, Brainstorm.

Ghetto (adj.)
Describing people and/or objects that you feel negatively about as "ghetto," implies inferiority. Calling something or someone ghetto is "intentionally classist."
Source: DCentric

Alternatives: If you feel negatively about something, simply state that fact, and focus on specific areas of improvement. "Ghetto," should never be used as a synonym for a negative attribute.

Spirit Animal
Spirit animals are an important part of the belief system of some cultures. Non-natives using the term irreverently is a form of cultural appropriation, and is offensive to those

cultures.
Source: Thesaurus.com

Alternatives: Kindred Spirit. (Millennials--the word “vibe” or “mood” works too.)

“Your name is difficult to pronounce”
Repeatedly mispronouncing someone’s name, or pointing out that you find the name particularly difficult to pronounce or “foreign,” can make them feel unimportant. These microaggressions signal to individuals that they’re “strange,” less important, or that they’re less valued.

BBC.com

Alternatives: Ask someone if you don’t know how to pronounce their name. If you can, do it ahead of meetings so that when you meet them for the first time, you’re able to pronounce it correctly. Additionally, the YouTube channel “Pronunciation Manual” can be a great guide.

“Low man on the totem pole.”
Totem poles are very sacred items to the people who carve and display them. Figures carved on totem poles represent familial legends, lineages or events. In some First Nation communities, being low on the totem pole is actually a higher honor than being on the top.
Source: Indigenous Corporate Training Inc.

Alternatives: Person of lower rank, Junior employee (if appropriate.)

G*pped/G*p

This word comes from g*psy, and is used to describe the Romani people. It comes with many negative connotations, and is considered a racial slur.
Source: Thesaurus.com

Alternatives: Ripoff, shortchanged.

“Sacred Cows”
This commonly used term (especially by marketers) takes a sacred, holy aspect of someone’s religion and often applies it to a thing or idea that is “annoyingly untouchable.” For people of the Hindu faith, this slang term could be considered offensive, because it references their religion in a rather uncomplimentary way.
Source: InfoBloom

Alternatives: Of great importance, unchangeable, untouchable

“Peanut gallery”
This term for heckling or unwanted disturbance originates in the 1920s when the peanut gallery referred to the back section of theaters, which were the only places that people of color were allowed to sit at the time. The phrase was meant to poke fun at the idea of people of color engaging in intellectualism.
Source: Handshake

Alternatives: those present, audience, crowd

The acronym “POC” (for Point of Contact)
POC is also an acronym standing for “Person of Color.” This term is used primarily in the United States to describe any person who is not white or Caucasian.
Source: Handshake

Alternatives: Writing out/saying “point of contact”

“Ladies & Gentleman,” “Brothers & Sisters,” “Boys & Girls,” “Guys,” etc.
When referencing groups of people, it’s best to avoid gendered language and opt for “everyone,” or “folks” or simply “people.” This is especially important when crafting messages for a Pride or LGBTQ+ focused campaign. And if you don’t know the gender of a person you’re referencing, avoid “he or she” and instead opt for the recent AP approved use of the singular “they.”
Source: Golin

Alternatives: “Everyone,” “Folks,” “Y’all,” “People”

"Grandfathered"
This is a phrase that comes up frequently to describe companies or businesses who are allowed to operate under prior circumstances while new rules or regulations are implemented. Although seemingly innocuous, this word has its roots tied to racism in America. "Grandfathered" referred to suppression tactics used in the American South to ensure impoverished white males could vote while keeping black males disenfranchised.
Source: NPR

Alternatives: exempted, pre-approved, “legacied”, excused, pre-authorized

Using 'OCD' or ‘Crazy’ as an Adjective
For example, "I'm really OCD about it"

Obsessive-compulsive disorder (OCD) is a real and, for many, life-hindering mental illness that impacts all facets of daily life. Using "OCD" in the workplace to stand in place of holding your work to a high standard is dismissive of people who suffer from the disorder.

Use Instead: I want to make sure it's done well; I have high standards for my work; I'm a perfectionist.

Source: https://canbc.org/blog/stop-using-ocd-as-an-adjective-or-figure-of-speech/

Calling things “crazy” or “insane” perpetuates stigma, and draws on stereotypes. This can make it more difficult for people to seek treatment. People use ableist words and phrases everyday without realizing the harm they do. Ableism is defined as discrimination or social prejudice against people with disabilities based on the belief that typical abilities are superior.

Source: https://www.pennmedicine.org/news/news-blog/2018/september/that-crazy-why-you-might-want-to-rethink-that-word-in-your-vocabulary or https://hbr.org/2020/12/why-you-need-to-stop-using-these-words-and-phrases

Other terms to avoid:
* Divide and conquer
  * This term is a reference to colonialism where colonists divided native/indigenous peoples in order to create strife and conflict, leading to conquer.
* Man-Hours, Man Power

Additional Resources:
https://www.businessinsider.com/offensive-phrases-that-people-still-use-2013-11
https://bestlifeonline.com/offensive-sayings/
https://www.huffpost.com/entry/common-words-phrases-racist-origins-connotations_l_5efcfb63c5b6ca9709188c83
https://www.chauffeurdriven.com/news-features/in-this-issue/2013-15-common-phrases-with-horrific-pasts.html
https://www.today.com/tmrw/everyday-words-phrases-racist-offensive-backgrounds-t187422
https://www.babbel.com/en/magazine/common-racist-words-phrases
https://www.careercontessa.com/advice/ableist-language/
https://www.opportunityagenda.org/explore/resources-publications/social-justice-phrase-

guide
All-staff Resource Guide
1

We're thrilled you're here. Our work is only as good as our people and we believe we have the very best.
02

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About Carnegie
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our mission
To create powerful connections
between students and colleges
through marketing and enrollment innovation.
05

our vision
To become the most transformative
integrated marketing and enrollment solution
in higher education.
06

core values
collaboration —working together to be incredible partners to each other and clients

innovation —constantly making something new and better
client success —caring about clients on a professional and personal level
continuous improvement —possessing a spirit of excellence and progress
people first —believing that human connection is what makes life meaningful
1
2
3
4
5
07

08

I would be remiss if I didn't begin by talking about human connection. And in fact, it's our trademark the power of human connection. And I would wager that no matter what. Any of you do in the room today, whether it be it, whether it be marketing, whether you're an executive. Right, whether you're in project management at the end of the day, we are all talking to human beings as human beings and connecting with people or we're not.

In higher education and enrollment growth and management pipeline management, you are trying to connect with students and their parents at the end of the day. And so we think about human connection and everything that we do. How do we meaningfully forge connections with people that cause conversion. And affinity for your school and I can prove a hopefully by the end of the next 30 minutes. Do we know how to do this in a really unique and powerful way that's measurable and its objective, we can actually measure this for you.

competencies
09
brand strategy
financial aid optimization
digital marketing
enrollment strategy
integrated research
lead generation
student search

marketing strategy
slate optimization
signature creative
personality assessments
web development
core
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.

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
accomplished frontrunner
enthusiastic provider
brand
personality
SILVER
rebel
GREEN
explorer
YELLOW
innovator
ORANGE
creator
RED
entertainer
PURPLE
supporter
MAROON
competitor
BLUE
achiever
PINK
sophisticate
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.
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.
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.

strategic goals
MANAGED ORGANIC GROWTH

Achieve managed divisional growth of 15-20% across the company.
1
2
3
4
SOLUTION INTEGRATION
Invest and focus on product integrations to deliver differentiated solutions to clients.

SEGMENT EXPANSION
Harness acquisitions, partnerships, and organic service expansion into other segments in higher education.
EMPLOYER OF CHOICE
Be the employer of choice, everyday, for every employee.
PRODUCT INNOVATION
Maintain and advance our leadership in higher education through continuous improvement and innovation.
5
6
CLIENT SUCCESS
Provide a best-in-class and seamless client experience

12

13
See our organizational chart using Insperity OrgPlus.
+
information technology
org structure
executive leadership
finance
human resources
operations
bus dev + marketing
client success
collegeXpress
digital marketing
slate optimization
research, modeling, strategy

creative
[business and client support divisions]
[portfolio-owning divisions]
web
CLARUS
student search

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.
company
history
14
1985
2001
2009
2013
2018
2020
2021
2022
2023
Joe Moore joins his family's business, Carnegie Communications, a producer
of a print magazine focused on connecting students with schools (Private Colleges & Universities).
Carnegie Communications sells its print magazine business to Alloy, Inc. (ALOY) a publicly traded company.
Under the ownership of Alloy, Carnegie becomes the first firm to offer digital marketing services focused on higher education.
Joe Moore buys Carnegie
back from Alloy.
Carnegie and Dartlet officially merge in
January 2018.

New Heritage invests in Carnegie Dartlet
on Oct 1, 2020.
Carnegie acquires Underscore in
May 2021.
Carnegie acquires mStoner in
October 2021.
2021
Carnegie acquires Maguire Associates
in July 2022.
Carnegie acquires CLARUS Corporation
in March 2023.

Carnegie acquires
Fire Engine Red in December 2023.
2023
Carnegie acquires the National Small College Enrollment Conference in January 2023.

New Hire Checklist
2
15

Aligning Expectations
16
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.

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One-on-One Meetings
17
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.

Making the Most of Your Time
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
18
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
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Central Tools + Channels
3
19

Communication Tools
20
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.

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.
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.
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.
Slack
Gmail
Asana
Zoom

Communication Norms
Slack
Gmail
Asana
Zoom

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 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 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.

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.

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Conducting Meetings

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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.
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Additional Cross-Company Software

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.

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.
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.
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.
Harvest
Tinman
Google Suite
Other
23

Company Announcements
24
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.

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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.

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Where Can I Find...?

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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.

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!

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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.

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.

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Carnegie Brand Tools

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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)

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

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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
To contact Marketing, email marketing@carnegiehighered.com
*Underscore, mStoner, and Maguire Associates references have been retired

Ways to Be Involved
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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:
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TeamCare
Our Corporate Social Responsibility
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.
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To indicate interest in joining any of these groups, please complete this form.

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.

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

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

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

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

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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.

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Celebrating Our Team

Prize Tickets

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!
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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:
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.

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.
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Activities + Events
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
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Professional Development
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.
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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:
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Carnegie InsideOut
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.

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:
Attendee
Presenter
Session Host

Agenda
There are five main stage sessions (each 45 minutes) and 21 breakout session opportunities (each 30 minutes) on the 2024 agenda.
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Carnegie InsideOut is a two-day internal conference—for employees, by employees—designed to cultivate confidence from the inside out.
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Recorded Sessions
All recordings of 2024 sessions are available to watch and reference in the future.
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View session recordings and presentation decks from the 2024 Carnegie InsideOut sessions.

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Mentorship Program
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.

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

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To learn more, see the Mentorship Program Overview document.

Thought Leadership
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.

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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:
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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

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CarnegieChem
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.
Discover Who You Are and Who's on Your Team
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).
> 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!

Human Resources Support
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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.
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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
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)
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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

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)
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HR Quick Links
39
Job Descriptions
Every title at Carnegie has a job description. You can view a list of all titles and their associated job descriptions here.
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Taking Time Off
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.
An Uncapped, Flexible Plan
For more information, please see the PTO Policy info sheet, and the company's handbook.
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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.
+
+
+

Taking Time Off

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:

Letting Others Know You Are Away

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)

(red alert)

(stop sign)

(sick face)

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.

Calendar Use
The steps below detail the process for managing those calendars.
Employee submits PTO request via Insperity
Manager receives PTO request, looks up the date(s) on the relevant PTO calendar, confirms that PTO can be approved and approves via Insperity.
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:
Full Day: [First Name] [First initial of last name] - PTO
Half Day: [First Name] [First initial of last name] - 1/2 PTO (AM/PM)
examples: "Jane P - PTO" or "Jane P - ½ PTO (PM)"
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
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Upon starting at Carnegie, you'll be given access to our Central Admin PTO calendar as well as your divisional PTO calendar.
PTO Calendars

Holiday Calendar
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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

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!

Break out the Sunscreen and Picnic Baskets

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.

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Traveling for Work

Travel Policy + Reimbursements

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.

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

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.

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.

Employee Referral Bonus Program

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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!

Invite Your Friends and Connections to Apply at Carnegie

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?
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).
Having a say in who the Talent Acquisition team is considering when adding to our Carnegie family.
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.

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:
You can use the online report form that is available.
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.
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.

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.

View the Parental Leave Policy Process.

See Parental Leave Policy FAQs.

Review Carnegie's Employee Handbook.

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 - 2024
Insperity Training
Mid-Year Insurance Change
Harvard Pilgrim
UnitedHealthCare
VSP Vision Care
Insurance Rates - 2024

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who to contact in human resources

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

ALLISON LETIZI
VP, HUMAN RESOURCES
hr@carnegiehighered.com
+
KRIS PETERSON
BUSINESS MANAGER
kpeterson@carnegiehighered.com
+

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

CONTACT

Information Technology Support

6

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IT Support

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

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.

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

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+

do you have a technical concern or issue?

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

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.

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CONTACT

Production Resources

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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.
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

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.
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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.
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.

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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.
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Understanding the Archetypes
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.

Archetype Theory for Organizations and Teams
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File Naming Conventions
59
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
+
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.

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

identified challenge.
Someone at a college/ university reads one of our blog posts and submits an inquiry on our website.
We get notified that we've won the work!
We write a contract for the work; the sales lead sends it to client for review/ signature.
Our Bus Dev team works with divisional Subject Matter Experts to create a proposal based on the client's needs.
That team member sends a follow-up email to the connection to see if they'd like a proposal.
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.
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.
The sales lead submits a Proposal Request in Tinman and provides a detailed description of the client need.
The institution invites us to respond via email or our Bus Dev team finds the RFP and decides to pursue it.

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:
Does the client require us to use their contract template?
No
Yes
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.
Request a Carnegie Tinman Contract using the Contract Request form.
Does the client have an existing/active Master Service Agreement (MSA) on file with Carnegie already?
Yes
No
Request a Statement of Work (SOW) from the Operations team using the Contract Request form.
What if the client pushes back and requests a MSA/SOW format?
Request a MSA and SOW from the Operations team using the Contract Request form.
1

1
1
2
START HERE
62

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.
Are we talking about a change within a Digital Media plan?
No
Yes
63
Does the change require additional budget?
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.
Yes
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)?
No
Yes
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.
CSL should ask the client if they would like to approve the scope swap via email.
If "Yes"
If "No"
START HERE
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.

Company Information
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Should you ever need to reference the following pieces of information...
Mailing Address
210 Littleton Road, Suite 100
Westford, MA 01886
+
Legal Name
Carnegie Dartlet LLC
+

carnegiehighered.com
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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!

Carnegie 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.

WOULD I MAKE A GOOD MENTOR?

Experienced employees with a passion for helping others grow and confidence in their ability to coach others to success are encouraged to express interest in being a mentor.

WHAT IS THE TIME COMMITMENT?

A mentor/mentee pair is intended to meet monthly for one hour or bi-weekly for 30 minutes. The Ops team will check in at 90 days and six months to confirm mentors/mentees are still getting what they need out of their pairing. If a pairing has run its course, participants can opt out of the program or request to be rematched at those times.

WHAT ABOUT CONFIDENTIALITY?

The Mentor/Mentee relationship is one built on the foundation of trust and support. You can expect all conversations between a mentee and mentor to remain confidential, though there may be instances in which a mentor encourages the mentee to consult their manager or Human Resources.

WHAT IS THE MENTORSHIP PROGRAM NOT?

While very personal conversations may happen naturally, the Mentorship Program is not a counseling platform. Mentors are not trained for such conversations, and employees seeking counseling should refer to the Employee Assistance Program through Insperity.

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.)

Please direct additional questions to ops@carnegiehighered.com.

FOUNDATIONAL PREMISES

TRUTH IN ALIGNMENT

At the core of CarnegieChem®’s philosophy is a belief that alignment fuels authenticity.

Now that you've completed the CarnegieChem® assessment, you can begin to understand yourself and your teammates in an intricate and intimate way. Your personalized results identify who you are, what motivates you, what your weaknesses may be, and what personality types you are naturally drawn to.

However, as with any personality assessment, it is one thing to quickly and simply read your results and quite another to reflect on their meaning and then use the insights you arrive at to inform the way you navigate the complexity of human to human interaction within this world. CarnegieChem® empowers you to do the latter because knowledge is one thing, but informed action is quite another.

In order to realize the benefits of truth in alignment, you must accept that authentic expression is only possible through intentional and repeated actions and behaviors that are tethered to your unique personality.

Let's use one aspect of your personality profile, your Persona, as a real-world example of how the actions you take may either align with or branch away from who you intrinsically are. CarnegieChem® has classified you as one of many possible Personas (check out the Personas tab to learn about Persona theory and CarnegieChem®'s unique Personas).

THE POWER OF PERSONA

Established psychological principles suggest that people may choose to portray different Personas to make themselves appear more desirable in different situations. Indeed, even without realizing it, you may act one way at work, one way with friends, and another way at home with family.

At a base level, there is nothing intuitively wrong with such practices. Maybe on the basketball court or in a fierce game of Scrabble, you want to express yourself more competitively. Indeed, some might even contend that it is simply human nature to adapt to those situations in which you find yourself. However, at your core, there is a single Persona that most closely represents your true sense of self, and that has been identified within your CarnegieChem® profile.

COGNITIVE DISSONANCE AND CORE SELF

clear and defined insight into who you uniquely are will lead you to move towards authenticity.

Diverging too far or too frequently from your authentic Persona can result in you feeling the effects of what is known as cognitive dissonance. These effects come from the subconscious discomfort people feel when the actions they take contradict their beliefs, values, or, as CarnegieChem® contends, their true personality. Such discomfort may be felt through a sense of dread each Sunday night as you anticipate going into an office the next morning where you are expected to act a certain way. It might be the annoyance of having to claim that it's "not a problem" to attend an extended family dinner at a steakhouse despite you being a vegan. These effects, whether solely emotional or even physical symptoms such as back pain, stomach aches, or headaches, are only amplified within those people who lack a firm grasp of who they are and what motivates them.

The good news is that thanks to your commitment to learning more about yourself and what makes you tick through CarnegieChem®, you have now joined those who have identified their core sense of self and discovered their core Persona. Choosing to act in ways that are truly, fully you, and connecting with others in a more honest and genuine way will help you ensure that any negative effects of cognitive dissonance become a thing of your past. Possessing clear and defined insight into who you uniquely are will lead you to move towards authenticity and alignment through your projection of Persona and expressions of personality.

CONSISTENCY & ENDURANCE OF PERSONALITY EXPRESSION

Understanding your core sense of self yields many daily benefits; it helps you to walk through life with greater confidence; it guides your decision-making and the paths you choose to explore; it helps you to connect with others more meaningfully; it allows you to remain true to your sense of purpose and pursue your goals with fewer challenges and with a greater chance of meeting them. While everyone could certainly benefit from the greater success and happiness that comes from such understanding, these benefits do not come without a cost. Having to consistently choose those actions that align with your truest self can cause weariness in some and even result in something called decision fatigue.

Decision fatigue

You only have so much willpower that you can spend each day

Decision fatigue is a well known psychological principle that claims that everyone has a unique capacity to make decisions based on their traits and characteristics. When someone's threshold for decision making is exceeded, it can result in the inability to make any decisions (cleverly known as analysis paralysis) and certainly the inability to make those choices that are true to who they are. Every day presents you with thousands of choices, some large, some seemingly small. From what you choose to have for breakfast and what you choose to wear, to what time you leave the house and whether you stop to put gas in the car, each decision reduces the balance of what can be termed your "willpower bank." You only have so much willpower that you can spend each day and the more it reduces, the less you have left for large and important choices. This is why people like Barack Obama or Steve Jobs have been known to restrict their wardrobes to certain color palettes or types of apparel. By swiping their metaphorical decision-making debit card one less time through the elimination of what they considered to be trivial decisions, they were able to preserve their willpower for more consequential ones.

It is important to preserve your willpower bank for the most important decisions you'll encounter each day, which you can do through making similar decisions in consistent ways. Introducing structures, rules, or guidelines into your life that align with your truest

self will help you to maximize consistency each day and within every moment. That the 44th president only wore gray or blue suits and the Apple co-founder defaulted to black turtleneck are both decisions that complement well their core identities and priorities as leader and entrepreneur respectively. These decisions should then be considered aligned with their authentic personalities and motivators.
all nine archetypes

You probably already make consistent decisions without even knowing it. When you go to Starbucks® in the morning, you most likely have a go-to drink. If you were to give careful and equal consideration to every possible drink on the menu, not only would you deplete your willpower before you even made it to the office — you'd also spend so much time contemplating your choices that you'd completely miss your first meeting!
Authentic Self and Decision-making
...you will travel through life with a certain comfort, assured of yourself and your actions.
While the difference between a Pumpkin Spice Latte or a single-roast fair-trade pour-over might not have much of an association with your most authentic self, where you choose to purchase your coffee might. If, earlier, you were offended at the suggestion that you might head to a Starbucks®, because you only drink coffee from the local artisan roaster down the road, that guideline and definitive rule reduces one potential decision you have to make. It also may reinforce your identity as a person who intrinsically appreciates craftsmanship and artistry, or who truly values local communities.
To arrive at such guidelines, it is worth taking the time to consider how your Persona—in combination with your unique values and beliefs– should show up in this world. Then make the types of decisions that, when made once, will not require you to reconsider them, unless your values and beliefs change. If you have a Storyteller Persona and work in sales or launch a podcast, these career and hobby choices are likely aligned and authentic. If you have a Mentor Persona and get involved with Big Brothers Big Sisters of America, such a choice is likely aligned. Once you have made such important and wide-ranging decisions, you simply have to stick to them to find true consistency and endurance in your expression of personality.
When you consistently embody your authentic self through making decisions that don't deplete your willpower and instead conserve it for the most consequential choices, you will travel through life with a certain comfort, assured of yourself and your actions. Tapping into a greater alignment, consistency, and endurance of your expression of personality that rings true with those you encounter will position you to better realize the potential in human connections and relations at the place where authenticity and opportunity meet.
To learn more about additional facets of CarnegieChem®'s philosophy, be sure to check out the Archetypes, Personas, Motivators, Performance Zones, and Group Dynamics pages.

INTRODUCTION TO ARCHETYPAL PERSONIFICATION

HISTORY OF ARCHETYPES

Archetypes have, by some estimation, been a part of humanity's story and culture since its very beginning. They were the central cast within narrative sagas shared around the open fire with tribe members. With the advent of the written word, their prevalence and influence only increased.

Archetypes have been used in the works of Shakespeare, Dante Alighieri, Voltaire, and other literary geniuses and featured within the works of modern literary favorites, such as Charles Dickens, J.R.R. Tolkien, and Madeleine L'Engle. From mythology to literary texts to cinema, Archetypes are present in every culture's stories, whether oral or written and old or new. They are the reason that Star Wars has resonated with generations of fans, and why timeless and classic fairy tales like Cinderella and Sleeping Beauty get repackaged and retold every decade or two. Creators of the Marvel Cinematic Universe and its marquee productions, producing some of cinema's most successful film releases, attribute the triumph of their work to the heavy application of Archetypes.

WHAT EXACTLY ARE ARCHETYPES?

Archetypes personify the impersonal and inherited traits that can motivate how anyone acts or reacts.

Plato voiced a belief and theory that Archetypes were one example of what he called "Forms." From Plato's perspective, the true representation of anything is its non-physical essence and any object, person, or matter in the physical world should be considered as mere imitations of an ideal. Indeed, the very term "Archetypes" comes from the Greek adjective ἀρχέτυπος (archétypos), which many have translated to mean "first-molded."

The psychologist Carl Jung (1875 - 1961) built upon Plato's Theory of Forms, Immanuel Kant's concept of "categories," and Arthur Schopenhauer's idea of "prototypes" to construct his theory of Archetypes. Jung applied the term to a psychological principle that identified and defined recurring symbols or motifs commonly found in literature, painting, and mythology. Jung identified universal and primordial images derived from the deepest layers of unconscious psyche and began naming core archetypal gures ranging from "The Great Mother" to "The Trickster," core archetypal events such as "marriage" and "death," and core archetypal motifs like the "act of creation" and "apocalyptic events." He held that Archetypes have their root in the "collective unconscious" of humanity, which is why people everywhere can so intuitively understand and resonate with them.

Archetypes have existed since time immemorial, Carl Jung helped identify and define

them, and there is great benefit in their continued use today.
They can lead you to:
* Tap into an age-old system to better understand how and why you do what you do.
* Understand the manner in which you view the world.
* Become aware of what guides and drives you.
* Find and recognize those who share your Archetypes.
* Better understand, nurture, and strengthen existing relationships.
* Understand why people, groups, and society make the decisions they make.
* Make more thoughtful decisions and plans for your life.

At the end of the day, Archetypes personify the impersonal and inherited traits that can motivate how anyone acts or reacts, whether someone is aware of them or not. They are much like instincts, originating in the subconscious but surfacing to influence feeling and behavior.

CarnegieChem® APPROACH & MODEL
CarnegieChem® built upon archetypal theory to construct a unique model to determine and identify who you are. Carnegie Dartlet for years has used this very model to help define institutions, forge powerful connections between audiences, and ultimately redefine how people communicate with one another.
Opinions vary as to how many distinct Archetypes there are. Some frameworks, like that of Carl Jung and the zodiac, define a total of 12. Others claim there are thousands, each possessing distinct behavioral patterns and subtleties with identities as wide-ranging as the Environmentalist and the Glutton. CarnegieChem® is built upon nine core Archetypes, each of which is given a color identifier. Within these nine, all identities can be organized. They are “The Blue Achiever,” “The Maroon Competitor,” “The Green Explorer,” “The Orange Creator,” “The Pink Sophisticate,” “The Purple Provider,” “The Red Entertainer,” “The Silver Rebel,” and “The Yellow Innovator.”
all nine archetypes

YOU ARE ALL NINE ARCHETYPES
Everyone has a bit of every Archetype in them – but all in different proportions. These proportions result in you becoming the unique character that you are and affect how you form values, ideas, and relationships. The two most prominently expressed Archetypes form an individual’s Persona. In contrast, an individual's least pronounced Archetype is the one that is most unconscious and therefore has the least amount of influence on their actions.

Learn more about the nine primary CarnegieChem® Archetypes and their role in the complex web of interpersonal connections below!

THE PURPLE PROVIDER

Selfless supporters that uplift, care for, and encourage others.

SUMMARY

A world without Purple Providers is one no one would want to endure. Purple Providers are selfless, compassionate, and naturally put the needs of others first, often over their own. They are invaluable to any group or ecosystem for the goodness they bring and for the care they hope to provide. Their genuine concern for others, and the trust that concern cultivates, attracts an immense network of friends and followers.

Purple Providers have risen to serve as some of this world's most effective leaders and guides, and their compassionate empowerment of others has led to the coining of the axiom "servant leader."

Make no mistake—there's nothing weak or soft when it comes to Purple Providers, so do not take their friendliness, positivity, and compassionate disposition lightly. They are natural team builders, relationship nurturers, and community gatherers whose penchant for caretaking fosters wellness and boosts morale for everyone they encounter.

One of the most versatile, likable, and accommodating Archetypes, Purple Providers are a much needed and welcome asset to any group and its dynamics. If they're absent, everyone will feel it, and their sensitive touch will be greatly missed.

MOTIVATOR MIX

A Purple Provider's motivation is exclusively aligned with the Vitality Motivator. In its purest incarnation, the Purple Provider's motivations are not influenced to any extent by the Strength or Creativity Motivators.

ESSENTIAL BELIEFS & TENDENCIES:

* Believe people should be cared for and encouraged.
* Desire to make others feel safe and supported.
* Have a strong desire to mend and heal.
* Become loyal teammates and trusted allies.
* Are put off by aggression and selfish motivations.

POSITIVE TRAITS:

* Attentive
* Hospitable
* Caring
* Generous
* Compassionate
* Protective
* Inclusive

* Sympathetic
* Considerate
* Nurturing
* Selfless
* Supportive

POTENTIAL FAULTS

(Everyone has flaws, it is just part of being human...)

* Clingy
* Patronizing
* Possessive
* Self-sacrificing
* Smothering
* Sycophantic

INNATE MODE OF CONNECTION

Care with me and be selfless, nurturing, and supportive!

WELL-KNOWN PROVIDERS:

Mahatma Gandhi, Mother Theresa, Jimmy Carter, Eleanor Roosevelt, Matt Damon, Rachel Ray

WELL-KNOWN PROVIDER BRANDS:

American Red Cross, Trader Joe's, Johnson & Johnson, Hallmark, Habitat for Humanity, TOMS Shoes

THE GREEN EXPLORER

Explorers, questioners, and investigators that venture out into the unknown.

SUMMARY

Green Explorers are spirited adventurers who are constantly exploring and questioning the world around them. Their insatiable curiosity dives deep into the details in pursuit of enlightenment and understanding. Where a Green Explorer finds themselves at any given moment is typically never their endpoint because they are always searching for something new and not yet known. Green Explorers are society's trailblazers, satisfied and even propelled by a degree of danger and uncertainty.

Many lands and countries have been discovered and established by Green Explorers venturing into the mist in search of a better life for themselves and others. They mobilize groups around a mission, believing that there is always room for improvement and more to be discovered.

MOTIVATOR MIX

A Green Explorer's motivation is aligned primarily with the Creativity Motivator and secondarily with the Vitality Motivator. In its purest incarnation, the Green Explorer's motivations are not influenced to any extent by the Strength Motivator.

ESSENTIAL BELIEFS & TENDENCIES:
* The noblest pursuit is the quest for new knowledge.
* Continually inquiring and examining everything.
* Have an insatiable thirst for progress and discovery.
* Cannot sit still or accept present realities.
* Curiosity and possibility underpin their actions.
POSITIVE TRAITS:
* Adventurous
* Curious
* Exploratory
* Inquisitive
* Investigative
* Journeying
* Discerning
* Philosophical
* Pioneering
* Experiential
* Questioning
* Examining
POTENTIAL FAULTS:
(Everyone has flaws, it is just part of being human...)
* Flighty
* Intrusive
* Meddlesome
* Nosy
* Obsessive
* Risky
INNATE MODE OF CONNECTION
Explore with me and be adventurous, inquisitive, and investigative!
WELL-KNOWN EXPLORERS:
The Dalai Lama, Albert Einstein, Amelia Earhart, Lewis and Clark, Sherlock Holmes, Malcolm Gladwell
WELL-KNOWN EXPLORER BRANDS:
Clif Bar, GoPro, NASA, The Smithsonian, Zagat, REI
THE MAROON COMPETITOR
Resilient, tenacious, and determined workhorses that get it done.
SUMMARY
Maroon Competitors are the consummate engines that work hard and persevere to

achieve. Defined by their intense determination, resilience against obstacles, and an attitude that just won't quit, Maroon Competitors are some of the most desirable members of any group pursuing a difficult goal. They are persistent in their drive and seemingly unrelenting in their pace, and will work until victory is realized.

In contrast to the Blue Achiever Archetype, Maroon Competitors do not believe that they are at the top of their peak yet. There is a proverbial chip on their shoulder fueling their need to prove their abilities and win. Associated with fighters, contenders, and underdogs, Maroon Competitors garner admiration and respect readily due to their lack of ego matched with their impressive strength and results. Their reticence to admit that they can't do something, accept defeat, or back down from any challenge makes them perhaps the most stubborn personalities in any group.

MOTIVATOR MIX

A Maroon Competitor's motivation is exclusively aligned with the Strength Motivator. In its purest incarnation, the Maroon Competitor's motivations are not influenced to any extent by the Creativity or Vitality Motivators.

ESSENTIAL BELIEFS & TENDENCIES:

* Value extreme and hard work.
* Gritty and strong, they're determined to overcome.
* Have no tolerance for laziness or inability.
* Highly competitive and intent on proving prowess.
* Will not be outpaced or outworked.

POSITIVE TRAITS:

* Competitive
* Gritty
* Determined
* Industrious
* Persevering
* Uncompromising
* Proud
* Relentless
* Resilient
* Scrappy
* Tenacious
* Tough

POTENTIAL FAULTS:

(Everyone has flaws, it is just part of being human...)

* Boastful
* Cutthroat

* Forceful
* Abrasive
* Obstinate
* Stubborn

INNATE MODE OF CONNECTION

Strive with me and be resilient, industrious, and tenacious!

WELL-KNOWN COMPETITORS:

Joe DiMaggio, Bear Grylls, Mary Lou Retton, Robert "Rocky" Balboa, Captain America, Claire Dunphy

WELL-KNOWN COMPETITOR BRANDS:

Under Armour, AAA, U.S. Postal Service, Home Depot, Levi Strauss & Co., Energizer Holdings (Makers of Energizer Batteries)

THE ORANGE CREATOR

Creative and expressive artisans who originate new ideas.

SUMMARY

Orange Creators make up the world's creative class because they are so imaginative, self-expressive, and intensely original. They are motivated by bringing new ideas and concepts to life in ways that move and inspire.

A large proportion of Orange Creators can be found broadly in the arts, entertainment, and the sciences. They are attracted to fields like music, design, and animation, within a broad range of skilled crafts, as well as in highly technical fields like engineering and architecture.

Iconic Orange Creators have shaped global culture with their innate ability to translate mood, emotion, and story into something tangible for all of humanity to experience.

Conversely, Orange Creators can be isolated, misunderstood, or hard to reach due to their perceived whimsy and originality.

MOTIVATOR MIX

An Orange Creator's motivation is exclusively aligned with the Creativity Motivator. In its purest incarnation, the Orange Creator's motivations are not influenced to any extent by the Vitality or Strength Motivators.

ESSENTIAL BELIEFS & TENDENCIES:

* Intensely expressive.
* Communicate in diverse ways.
* A lack of imagination and rigidity may feel oppressive.
* Constructive, conceptual, and adept storytellers.
* Manifesting new and creative concepts is their end goal.

POSITIVE TRAITS:

* Abstract
* Artistic

* Evocative
* Conceptual
* Contemporary
* Creative
* Eclectic
* Interpretive
* Expressive
* Imaginative
* Offbeat

POTENTIAL FAULTS:

(Everyone has flaws, it is just part of being human...)

* Aloof
* Artsy
* Bizarre
* Convoluted
* Outlandish
* Impractical

INNATE MODE OF CONNECTION

Create with me and be artistic, imaginative, and original!

WELL-KNOWN CREATORS:

Wolfgang Amadeus Mozart, Pablo Picasso, William Shakespeare, Charles and Ray Eames, Walt Disney, Janis Joplin

WELL-KNOWN CREATOR BRANDS:

Adobe Systems, LEGO, Nintendo, Pixar, Crayola, Volkswagen

THE YELLOW INNOVATOR

Big idea generators and radical concept advancers.

SUMMARY

Yellow Innovators are an instrumental—and sometimes rare—asset to any group, society, or culture. These are the individuals that need to invent, transform, and continuously develop new products, services, and processes. They are constant sources of ideas, visions, and opportunities for advancement and progress. Yellow Innovators can be high-risk individuals who recognize that true innovation means stepping into the experimental unknown, even if it means moments of failure. They dabble in theories and are comfortable working in the gray, in search of brilliant and transformational solutions.

Incessant ingenuity and a thirst for reaching into the unseen is a hallmark of this Archetype. Without them, global civilization might still be stuck in the Stone Age. It was Yellow Innovators who invented the wheel that gave humanity early mobility, and the aircraft that gave humanity flight. When you need to make tomorrow come into being today and when you need to create what others are not, turn to Yellow Innovators.

MOTIVATOR MIX

A Yellow Innovator's motivation is aligned primarily with the Creativity Motivator, and secondarily with the Strength Motivator. In its purest incarnation, the Yellow Innovator's motivations are not influenced to any extent by the Vitality Motivator.

ESSENTIAL BELIEFS & TENDENCIES:

* Thrive on new concepts and experimentation.
* Live to make things newer and better.
* Work well in ambiguity or unknowns.
* Feel stifled by established processes and the status quo.
* See endless possibilities and opportunities to invent.

POSITIVE TRAITS:

* Advanced
* Analytical
* Brilliant
* Experimental
* Forward-thinking
* Ingenious
* Innovative
* Intelligent
* Inventive
* Leading-edge
* Visionary
* Transformative

POTENTIAL FAULTS:

(Everyone has flaws, it is just part of being human...)

* Complicated
* Erratic
* Ever-changing
* Scatterbrained
* Unrelatable
* Untested

INNATE MODE OF CONNECTION

Invent with me and be intelligent, enlightened, and innovative!

WELL-KNOWN INNOVATORS:

Thomas Edison, Claude Monet, Steve Jobs, Daedalus, Iron Man, Gandalf The Gray

WELL-KNOWN INNOVATOR BRANDS:

Apple, Microsoft, Intel, Tesla Motors, Amazon, SpaceX

THE RED ENTERTAINER

Cheerful and enthusiastic purveyors of fun and optimism.

SUMMARY

Red Entertainers are the world's fun-makers, volume boosters, mood-builders, and general barometers of energy and tempo. Red Entertainers captivate and enthrall with their performances and stories, and may be the single most in-demand and attractive Archetype in the room; as evidenced by the increasing success of America's entertainment market. Red Entertainers elevate the daily mundane to something more vibrant, more sensational, and simply more fun. They generate excitement and enjoyment — encouraging laughter, playfulness, and general optimism. Sometimes their whimsy and volume can run its course in a group setting, but there's no doubt that Red Entertainers deliver much-needed vibrancy and color.

MOTIVATOR MIX

A Red Entertainer's motivation is aligned primarily with the Vitality Motivator and secondarily with the Creativity Motivator. In its purest incarnation, the Red Entertainer's motivations are not influenced to any extent by the Strength Motivator.

ESSENTIAL BELIEFS & TENDENCIES:

* Energetic and uplifting.
* Motivated to entertain and create excitement.
* Magnetic and able to rally support for new concepts.
* Often naturally talented presenters and speakers.
* Sensitive to the mood and condition of others.

POSITIVE TRAITS:

* Amusing
* Clever
* Dynamic
* Energetic
* Entertaining
* Enthusiastic
* Exciting
* Engaging
* Fun
* Humorous
* Playful
* Lively

POTENTIAL FAULTS:

(Everyone has flaws, it is just part of being human...)

* Annoying
* Manipulative
* Distracting
* Fanatical
* Melodramatic
* Silly

INNATE MODE OF CONNECTION

Enjoy with me and be playful, entertaining, and optimistic!

WELL-KNOWN ENTERTAINERS:

Charlie Chaplin, Lucille Ball, Beyoncé, Robin Williams, Willy Wonka, Bugs Bunny

WELL-KNOWN ENTERTAINER BRANDS:

Cirque du Soleil, Skittles, Geico, Tinder, Old Spice, City of Las Vegas

THE BLUE ACHIEVER

Standard-setters and ambitious go-getters who are comfortable in command and prefer to call the shots.

SUMMARY

As some of society's most influential success stories, Blue Achievers can be found at the front of any effort heading toward victory. While most might buckle under the pressure to succeed and the heaviness of their accolades, Blue Achievers actually thrive under this weight, inviting all eyes and expectations to turn to them for the best results. With much of their sense of self-worth tied to the value others see in their accomplishments, they welcome the responsibility for their team's well-being, outcomes, and reputation.

Blue Achievers are confident, self-assured, visionary, and thrive on the status that comes from conquering adversaries and accomplishing new feats. They are some of the most admirable icons in human history, influencing powerful movements and advancing societal growth. Every collection of people and personalities needs Blue Achievers, as their need to advance, accomplish, and demonstrate their adeptness proves vital in inspiring others to rise to even the most immense undertakings.

MOTIVATOR MIX

A Blue Achiever's motivation is aligned primarily with the Strength Motivator and secondarily with the Creativity Motivator. In its deepest incarnation, the Blue Achiever's motivations are not influenced to any extent by the Vitality Motivator.

ESSENTIAL BELIEFS & TENDENCIES:

* Achievement is paramount.
* Highly tolerant of risk and stress.
* Seeks influence and accomplishments.
* Comfortable making decisions with incomplete information.

* Set strategic visions and lead the way.
POSITIVE TRAITS:
* Assertive
* Authoritative
* Masterful
* Confident
* Decisive
* Dominant
* Elite
* Established
* Influential
* Powerful
* Prominent
* Strong

POTENTIAL FAULTS:
(Everyone has flaws, it is just part of being human...)
* Aggressive
* Bossy
* Controlling
* Domineering
* Exclusive
* Pompous

INNATE MODE OF CONNECTION

Lead with me and be powerful, confident, and assertive!

WELL-KNOWN ACHIEVERS:

Angela Merkel, Franklin Delano Roosevelt, Venus Williams, James Bond, Francis J. Underwood, Dumbledore

WELL-KNOWN ACHIEVER BRANDS:

Supreme Court of the United States, Rolls-Royce, LinkedIn, Facebook, Consumer Reports, IBM (they were even called “Big Blue”!)

THE PINK SOPHISTICATE

Sophisticated and refined assessors of excellence and experience.

SUMMARY

Pink Sophisticates are a group’s connoisseurs with a refined palate and penchant for all that is excellent. They are experiential and at times even ethereal in their pursuit of beauty in all of its forms. Pink Sophisticates are not for everybody, and this is probably because not just anybody can fit the bill. The Pink Sophisticate’s drive for excellence, refinement, and elegance often leads them to the top of the pack in their respective endeavors. They value self-expression, intentionality, and fine detail, and are often looked to as the standard holders. Society's Pink Sophisticates often find themselves contributing to luxury brands and companies like Bentley, Versace, and the like.

The Pink Sophisticate Archetype is not tied to a monetary class, but rather a specific set of ideals that often happens to align with top shelf and top tier products, materials, and ideals. They don't tolerate that which is unkempt, messy, or unconsidered because all of the details—and the entire experience—matters to Pink Sophisticates. They hold a high bar for themselves and others and believe that everyone should always strive to achieve their highest potential.

MOTIVATOR MIX

A Pink Sophisticate's motivation is aligned primarily with the Vitality Motivator and secondarily with the Strength Motivator. In its purest incarnation, the Pink Sophisticate's motivations are not influenced to any extent by the Creativity Motivator.

ESSENTIAL BELIEFS & TENDENCIES:

* Elegantly and timelessly focused on the ideal.
* Hold high regard for tradition and excellence.
* Dream up and pursue refinement, beauty, and vitality.
* Typically highly detailed and very observant.
* Mess and disorder only deflates their enthusiasm.

POSITIVE TRAITS:

* Aesthetic
* Poised
* Charming
* Classic
* Desirable
* Elegant
* Meticulous
* Idealistic
* Polished
* Refined
* Dignified
* Sophisticated

POTENTIAL FAULTS:

(Everyone has flaws, it is just part of being human...)

* Artificial
* Finicky
* Fussy
* Materialistic

* Superficial
* Vain

INNATE MODE OF CONNECTION

Refine with me and be poised, sophisticated, and idealistic!

WELL-KNOWN SOPHISTICATES:

Queen Elizabeth II, Abraham Maslow, Elon Musk, Sybil Branson, Miranda Priestly, Ariel

WELL-KNOWN SOPHISTICATE BRANDS:

Prada, Anthropologie, Godiva Chocolates, Tiffany & Co., Ivory, Harvard University

THE SILVER REBEL

Unconventionally independent rule-breakers and free thinkers who go their own way.

SUMMARY

Without a doubt the most polarizing Archetype of them all, Silver Rebels are rule-breakers, system fighters, activists, and daredevils who refuse to conform to any norm. They are relatively rare within group settings, preferring the freedom that comes with independence—which may be good since many people claim they can't relate at all to this Archetype.

Despite that, Silver Rebels have proven to be one of the most intriguing, inspiring, and attractive Archetypes throughout history, and are a much-needed force in today's era. They have an ability to effortlessly draw followings, even to seemingly unconventional or controversial ideas and causes. The founders of America were, in fact, pure revolutionaries who fought for an entirely new way of life. Many marvel at the free and fearless pirate, the leathered motorcyclist, the cool and defiant celebrity, these incarnations of an Archetype so many—perhaps secretly—wish they could be bold enough to embody.

Silver Rebels are daring, think differently, challenge systems, and disrupt established norms. Without these outlaws, some of the most important advances in history wouldn't have occurred. Handled carefully, Silver Rebels might just become a group's line pushers and territory takers.

MOTIVATOR MIX

A Silver Rebel's motivation is aligned primarily with the Strength Motivator and secondarily with the Vitality Motivator. In its purest incarnation, the Silver Rebel's motivations are not influenced to any extent by the Creativity Motivator.

ESSENTIAL BELIEFS & TENDENCIES:

* Rule breakers and establishment challengers.
* Have a low need to fit in with the pack.
* Value unconventional and independent thinking.
* Value freedom, boldness, and defiant ideas.
* Feel stifled by red tape and bureaucratic systems.

POSITIVE TRAITS:

* Brazen
* Revolutionary
* Daring
* Defiant
* Edgy
* Fearless
* Independent
* Mysterious
* Non-conformist
* Radical
* Rebellious
* Unconventional

POTENTIAL FAULTS:

(Everyone has flaws, it is just part of being human…)

* Callous
* Careless
* Elusive
* Impatient
* Abrasive
* Cocky
* Impulsive
* Irresponsible

INNATE MODE OF CONNECTION

Defy with me and be daring, rebellious, and fearless!

WELL-KNOWN REBELS:

Richard Branson, Sacha Baron Cohen, Dennis Rodman, Captain Jack Sparrow, Deadpool, Katniss Everdeen

WELL-KNOWN REBEL BRANDS:

Harley Davidson, MTV, Burning Man, Dyson, E*Trade, Red Bull

THE 10TH ARCHETYPE?

In our theory, technically the presence of a 10th archetype does exist, although you won't find it referenced in your results. The Beige Wanderer represents confusion or absence of personality and is an outcome to avoid or eliminate. The statistics our software uses to determine one's Persona in CarnegieChem® actually does account for Beige, but don't worry, we're assessing you at your best and therefore Beige isn't included.

THE BEIGE WANDERER
Confused and indistinct drifters, lost to self and lost in step.
SUMMARY
The Beige Wanderer is inconsistent and often inauthentic in their expression of self. Such inconsistency often leads to confusion within those they encounter. This may be due to overly shallow expressions of any other Archetype or the muddled blending of many. Beige Wanderers often try to be everything to everyone, fearful of taking a distinctive stance or offending and alienating anyone, but by doing so, they often end up meaning nothing to anyone.
The more dispersed and divided that a Beige Wanderer is in their expression, the less likely others will be able to perceive any portrayal of their personality at all. If a Beige Wanderer cannot comprehend and communicate their own intrinsic sense of self, they will be hard pressed to expect others to do so. A lack of comprehension or any memorable traits or characteristics leads to a Beige Wanderer's identity, along with any messages they manage to convey, being quite forgettable.
MOTIVATOR MIX
Uncertain and uninspired by any single Triadic Motivator in particular, their opportune use of the Strength, Vitality, and Creativity Motivators based on the situations Beige Wanderers find themselves in causes feelings of uncertainty and a lack of inspiration in others.
ESSENTIAL BELIEFS & TENDENCIES:
* There's no need to differentiate from others.
* All perspectives are equally worth holding.
* Will not risk offending anyone.
* Light opinions are held quite loosely.
* Information tells enough of a story.
COMMON BEIGE TRAITS:
While some of the following traits might, at first glance, be seen as positive, they are so commonly shared by both individuals and brands that they run the risk of not meaning anything to anyone or meaning many different things to different people. Either risk will negatively impact the strength and authenticity of any personality portrayal.
* Traditional
* Collaborative
* Empowering
* Ethical
* Dedicated
* Enterprising
* Passionate
* Consistent

* Trendsetting
* Inspiring
* Humble
* Beautiful

POTENTIAL FAULTS:

(Everyone has flaws, it is just part of being human...)

* Argumentative
* Clumsy
* Cryptic
* Difficult
* Dishonest
* Indiscreet
* Bureaucratic
* Predatory
* Sarcastic
* Secretive
* Untrustworthy
* Vague

INNATE MODE OF CONNECTION

None. Beige Wanderers uses all nine Modes of Connection in seemingly random or haphazard ways to the detriment of their narrative or story.

LITTLE-KNOWN WANDERERS:

Beige Wanderers don't leave much of an impression when encountered, nor are their disparate achievements or contributions to society, if any, chronicled in historical accounts.

LITTLE-KNOWN WANDERER BRANDS:

Beige Wanderer brands struggle to discover their core identity. Companies without a clear vision or purpose often fade within one generation. Although they may have a tremendous product, it's likely that few hear about nor become passionate enough about it to share it.

YOUR CORE PERSONA

HISTORY OF ARCHETYPES

Your personality profile is composed of a unique combination of all nine Archetypes in the CarnegieChem® model. Your core Persona is the combination of the two Archetypes with the greatest depth of personification. These are termed your Primary Archetype and Secondary Archetype.

Within the realm of all possible Personas, specific ones will accurately describe every person you might meet or interact with. These Personas provide a helpful guide and framework when trying to make sense of your world and relationships. You are one of many possible Personas. You may be an innovative Seeker, devising distinct and novel approaches to decode life's mysteries, and if so, you might find alignment in a career as a researcher within a leading-edge biotech company. You could, alternatively, be a caring Idealist, celebrating your vision of a world that provides the most benefit for all over any practical considerations, and if so, the alignment between identity and action might be realized when you start a non-profit or advocacy group dedicated to only the noblest cause. Or you could be neither of these, but, at your core, there is a single Persona that most closely represents your true sense of self.

BUT WHAT EXACTLY ARE PERSONAS?

people may choose to portray different Personas to make themselves appear in more desirable ways.

The concept of a Persona has meant many things to many people throughout history. The ancient Greeks used a related term, πρόσωπον, or “prosopon”, to refer to the physical masks people wore to portray different characters in a theatrical performance. Psychologists, including Carl Jung, consider Personas to be the metaphorical mask that you choose to adopt to present yourself to the world.

Established psychological principles suggest that people may choose to portray different Personas to make themselves appear in more desirable ways in different situations. Indeed, even without realizing it, you may act one way when at work, one way with friends, and another way at home with those who really know you. At a base level, there is nothing intuitively wrong with such practices. Carl Jung went as far as to suggest that the use of too many disparate Personas too frequently may cause an individual to lose themselves.

CarnegieChem® 81 Personas

Thanks to your commitment to learning more about yourself and what makes you tick through CarnegieChem®, you have now joined those who have learned their core identities and discovered their truest Personas, and you can now choose to appreciate and lean into it when fostering more genuine connections with others.

Use the following menu to explore all 81 personas:

PERSONAS WITH A PRIMARY PURPLE PROVIDE ARCHETYPE

THE PURPLE AND BLUE GUIDE

Guides are driven by a need to compassionately care for others and by growth and being frontrunners. They are a motivating force whose influence and good standing cause others to look to them for direction at life's many junctions. Guides draw meaningful satisfaction from steering others toward well-being, fulfillment, and positive change. They are confident, optimistic, helpful, and generous in their provision of care and counsel.

THE PURPLE AND MAROON GUARDIAN

Guardians are driven by a need to compassionately care for others and by a resolve to overcome challenges. They believe that everyone matters equally and that one's value isn't determined by their identity, status, or background. Guardians protect, preserve, and care for others and their values, even if it's at the cost of their own safety or wellbeing. Kind, patient, and empathetic, they inspire others to rise to defend those not yet capable of advocating for themselves.

THE PURPLE AND GREEN SHEPHERD

Shepherds are driven by a need to compassionately care for others and by the quest for the unknown. They guide, guard, and watch over others, seeking to steer them to the clearest path toward what is most good. A Shepherd's worldly knowledge combined with their strong need to help others make them a reliable leader, trusted for their strategic direction. Able to identify common ground and offer wise answers, Shepherds inspire confidence in others as to the paths worth taking.

THE PURPLE AND ORANGE PATRON

Patrons are driven by a need to compassionately care for others and by expressing themselves through artistry. They empower others to bring their creative dreams to life, committing their own resources and influence to that end. They lend their patronship to imaginative ideas and revolutionary causes, actively supporting the people and projects behind them. Patrons believe in the collective abilities of their communities and encourage their original avenues of expression so that together they can realize their grandest potential.

THE PURPLE AND PINK CONFIDANT

Confidants are driven by a need to compassionately care for others and by experience, elegance, and beauty in all its forms. They are the first that others turn to with their most private secrets and aspirations. The depth of their sensitivity and capacity for empathy causes others to trust Confidants fully as a source of comfort and support. Never one to judge, they allow others to voice their emotions and concerns, thereby easing their burdens and distress.

THE PURPLE AND PURPLE HUMANITARIAN

Humanitarians are singularly driven by compassion, warmth, and a need to care for others. They work to make other people's lives better through their devotion to good works and philanthropy. While supportive, selfless, and nurturing, they can be so to the extreme. When these positive traits are not carefully managed in their strength and expression, Humanitarians may cross the line into becoming clingy, patronizing, and even smothering.

THE PURPLE AND RED HOST

Hosts are driven by a need to compassionately care for others and by a desire to cause others to get excited. They exemplify hospitality in their actions and live for the opportunity to receive and entertain guests. Hosts bring people together to foster much-needed bliss and unity. Their simple acts of giving and receiving go a long way to provide others with a sense of comfort and belonging. On the surface, they may seem lighthearted or quick to make a joke, but by ensuring everyone else's needs are met, they show how deeply they care.

THE PURPLE AND SILVER ADVOCATE

Advocates are driven by a need to compassionately care for others and by a desire to challenge the establishment. They selflessly support and promote the interests or causes of groups, over and above their own interests. They seek to represent the unvoiced, oppressed, and those who simply need a hand, persuading others to wake up from their complacency and join them in making a radical change. Though valuing their independence, Advocates are willing to fight for what's right and will enter the fray in order to spark social change.

THE PURPLE AND YELLOW ADVISOR

Advisors are driven by a need to compassionately care for others and by a need to invent the future through innovation. People tend to flock to Advisors for their acute ability to foresee what's on the horizon and imagine the ramification of any action, seeking their guidance and next-step recommendations. They have an acute understanding of relationship dynamics and how people respond to change, making them wise and intuitive counselors able to heal and bring transformation.

PERSONAS WITH A PRIMARY GREEN EXPLORER ARCHETYPE

THE GREEN AND BLUE TRAILBLAZER

Trailblazers are driven by the quest for the unknown and by growth and being frontrunners. They are explorers at heart as they courageously break new ground to pursue the promise of what might be. They balance their inclination to be introspective and inquisitive with an enterprising spirit and willingness to take charge. They are as theoretical as they are ready for action, and are apt to inspire others to join them on their quest. Exceptional and ambitious scouts, Trailblazers are the first to lead brazen new initiatives all the way from idea to reveal.

THE GREEN AND MAROON ADVENTURER

Adventurers are driven by the quest for the unknown and by a need to overcome challenges. They feel a rush and exhilaration amid new opportunities and encounters, pushing past any perceived limitations or barriers to uncover what lies ahead. They are determined to demonstrate mastery along every step of their journey and not to leave any path unturned or unconsidered as they pursue new limits and discoveries. Adventurers are reflective of themselves and the world around them, and see every experience as an opportunity to grow in patience, find truth, gain perspective, and press on.

THE GREEN AND GREEN VOYAGER

Voyagers are singularly driven by the quest for the unknown. They embark on journeys to distant, unexplored realms, both physically and through thought experiments. While discerning, curious, and adventurous, they can be so to the extreme. When these positive traits are not carefully managed in their strength and expression, Voyagers may cross the line into becoming flighty, meddlesome, or even obsessive.

THE GREEN AND ORANGE SEEKER

Seekers are driven by the quest for the unknown and by self-expression through artistry. They chase after wisdom, answers, and truth, and meander down many paths to find it. As continual learners, Seekers probe into life's mysteries, asking questions few think to ask, thereby yielding novel perspectives and fascinating insights. They find the study of people intriguing and enjoy learning just why they act and think as they do.

THE GREEN AND PINK DETECTIVE

Detectives are driven by the quest for the unknown and by experience, elegance, and beauty in all forms. Natural investigators, they subject themselves, their surroundings, and their peers to the highest scrutiny. Aware of even the subtlest of clues, Detectives find and fit together various puzzle pieces to form a beautifully intricate answer or theory. Calculating and precise, they strategize many steps ahead to ensure that knowledge, truth, and order are served.

THE GREEN AND PURPLE AMBASSADOR

Ambassadors are driven by the quest for the unknown and by a need to compassionately care for others. People entrust their personal stories and information to Ambassadors, believing they will both guard and represent them well. Their equitable appraisal of logic, truth, and the emotions felt by others sets them apart as a voice of reason, able to discern between what is right and wrong or fact and fiction. Ambassadors nurture close relationships and foster community in order to connect people through shared experiences.

THE GREEN AND RED GLOBETROTTER

Globetrotters are driven by the quest for the unknown and a desire to cause others to get excited. They consider the world and its people a treasure trove, replete with exciting experiences and stories, and aspire to learn from each one. Their lively adventures may include the diligent study of foreign cultures, deep and spirited conversations with others, and even wild celebrations in and pilgrimages to new places. Each new experience provides extensive worldly understanding and Globetrotters desire to share this wisdom with others to aid them in their own journeys.

THE GREEN AND SILVER RANGER

Rangers are driven by the quest for the unknown and by a desire to challenge the establishment. They are not afraid of controversy as they toe the line between the established and accepted and frontiers not yet known. In so doing, they disrupt the familiar and expose revelations both fresh and unconventional. Indifferent to what others may think, Rangers adopt an outsider's viewpoint and perspective, fearlessly pushing and prodding boundaries to provoke others and foster the most tension.

THE GREEN AND YELLOW RESEARCHER
Researchers are driven by the quest for the unknown and by a need to invent the future through innovation. They are devoted to the scholarly practices of inquiry and the examination of complex concepts in order to better understand and transform them. To a Researcher, intelligence and critical study is key to propelling society forward, and to this end, they endeavor to ask brilliant questions in pursuit of more sophisticated solutions. Discontent to rely on intuition alone, they seek knowledge and put forth theories that are intelligent, structured, and beyond reproach.
PERSONAS WITH A PRIMARY MAROON COMPETITOR ARCHETYPE
THE MAROON AND BLUE CONTENDER
Contenders are driven to overcome challenges and by growth and being frontrunners. They demonstrate natural ability and grit, persist in the face of difficulties, and relish any chance to engage in contests or rivalry even against their own historical best. Contenders are singularly focused and determined to reach success in every endeavor as they strive to work harder, be better, run faster, and last longer.
THE MAROON AND MAROON FIGHTER
Fighters are singularly driven to overcome challenges through grit and determination. They are unwilling to yield in their commitment to a cause or group of people. While resilient, tenacious, and dedicated, they can be so to the extreme. When these positive traits are not carefully managed in their strength and expression, Fighters may cross the line into becoming stubborn, forceful, or even cutthroat.
THE MAROON AND GREEN PIONEER
Pioneers are driven to overcome challenges and by the quest for the unknown. They are comfortable embarking into wild and uncharted regions, unphased and even excited by unforeseen obstacles. They are at ease within the wilderness and seek the rush and exhilaration of pushing past limitations. Pioneers invite and inspire others to explore with them, with the goal of uncovering new pathways and ultimately bringing deeper meaning to life.
THE MAROON AND ORANGE MAKER
Makers are driven to overcome challenges and by self-expression and artistry. They are hands-on in their ideas, taking what is abstract and creating something tangible. Determined, hardworking, and original, Makers take what some consider to be a daunting creative process and embrace it with dedication and vigor. They are appreciated for their hard work, original interpretations, and relentless pursuit of achievement. Makers are always willing to put in the energy and effort required, as long as the final creation is meaningful and satisfying.
THE MAROON AND PINK PRECISIONIST
Precisionists are driven to overcome challenges and by experience, elegance, and beauty

in all forms. They are uncompromising and disciplined in their endless pursuit of order, accuracy, and perfection. Relentless and practical, their work ethic surpasses that of many others. Precisionists bring time-tested, methodical, and logical approaches to their endeavors, uniting excellence and order with the messiness of grit and grind.

THE MAROON AND PURPLE PROTECTOR

Protectors are driven to overcome challenges and by a compassionate need to care for others. They are staunch advocates of justice and find purpose in defending and shielding others from injury, oppression, or harm. They will go to lengths to champion the greater common good, even if it means standing alone. Rather than commit themselves to a single cause or ideal, they lend support and aid to anyone whose plight could be improved.

THE MAROON AND RED ENERGIZER

Energizers are driven to overcome challenges and by a desire to entertain and cause others to get excited. Their endless resolve and abundant enthusiasm naturally invigorates others to get involved. Energizers have the charisma and courage to enter life's circumstances and move both people and events to a desired action or outcome. It is not the end result that satisfies them as much as the opportunity for lively participation and dedicated work during all steps of their journey.

THE MAROON AND SILVER DARK HORSE

Dark Horses are driven to overcome challenges and by a desire to disrupt the norm and challenge the establishment. They have a healthy disdain for age-old cultural systems and standards, preferring instead to live at the edge of society and its expectations and ideas of success. Dark Horses are loath to tolerate defeat and make it their mission to prove others wrong. Often misjudged or underestimated, these rebellious overcomers surprise those quick to dismiss by achieving victory in the end.

THE MAROON AND YELLOW CHALLENGER

Challengers are driven to overcome obstacles and by a need to invent the future through innovation. They boldly and defiantly reframe potential hurdles as opportunities for personal and societal growth. Dedicated agents of change, Challengers contend that true transformation is possible only through taking continual bold steps forward, however difficult the obstacles or incredible the sacrifice along the way. For Challengers, great progress comes from great effort. Committing their all to a better and brighter future, they motivate individuals, and even systems, to change before their very eyes.

PERSONAS WITH A PRIMARY ORANGE CREATOR ARCHETYPE

THE ORANGE AND BLUE ARCHITECT

Architects are driven by self-expression and artistry and by growth and being frontrunners. Their intelligent foresight and carefully contrived plans help guide the construction of novel solutions. Architects have a natural ability to imagine creative yet practical approaches to solving the world's complex challenges. They find meaning in building impressive strategies, relationships, and structures that inspire wonder and awe from those who encounter them.

THE ORANGE AND MAROON ARTISAN

Artisans are driven by self-expression and a need to overcome challenges. They are devoted to their trade or craft and delight in bringing a plan or concept to life. They are pragmatic, tough-minded and decisive, and, at times, may take on too many challenges at once. Artisans are skillful and good problem-solvers, persevering through obstacles to make headway and see a project to completion.

THE ORANGE AND GREEN SEARCHER

Searchers are driven by self-expression and artistry and by the quest for the unknown. They believe that only the examined life is worth living as they strive to question everything and make newfound discoveries. Their incessant curiosity and scrutiny means that they think outside the box and bring what is hidden or unexplored to light. Their highest potential is best realized when surrounding themselves with others who accept their creative inquiry and probing personality.

THE ORANGE AND ORANGE ARTIST

Artists are singularly driven by self-expression through artistry. They translate the ordinary into the extraordinary whenever inspiration strikes. While creative, original, and imaginative, they can be so to the extreme. When these positive traits are not carefully managed in their strength and expression, Artists may cross the line into becoming impractical, aloof, or even outlandish.

THE ORANGE AND PINK COMPOSER

Composers are driven by self-expression and artistry and by experience, elegance, and beauty in all forms. They approach the act of creation, however messy, with refinement and poise. They are often torn between a desire for both freedom of voice and order and organization. With the right guide rails, they succeed in finding both, expressing their artistic and original abilities within set modes and guidelines. In working with others, Composers value their outside leadership and guidance but still want some degree of self-governance.

THE ORANGE AND PURPLE CURATOR

Curators are driven to express themselves through artistry and by a need to compassionately care for others. They seek novel and creative ways of doing things, whether in their artistic endeavors or through service to those around them. Curators play to their passions, doing and creating things that speak to others in deep and distinctive ways. Their work reflects a keen understanding of what's good for humanity and inspires others to reflect and respond in meaningful ways.

THE ORANGE AND RED STORYTELLER

Storytellers are driven by self-expression and artistry and by a desire to cause others to get excited. They bring audiences together to share warmly exaggerated, punchy narratives. Natural wordsmiths, Storytellers bend perspectives, twist conclusions, and creatively interpret events and characters. Playful and clever with words, they shock and amuse for the purpose of making unexpected connections, hinting at shared history, and revealing a fuller, richer meaning.

THE ORANGE AND SILVER NONCONFORMIST

Nonconformists are driven by self-expression and artistry and by a desire to challenge the establishment. Their need to radically speak their truth sets them apart as offbeat and original among their contemporaries. They take time to listen to the opinions of others, seeking to understand their more conventional perspective in order to bolster their contrary ones. With their views now battle-tested, Nonconformists are not afraid to challenge society's entrenched positions and implore others to reconsider, or even reset, beliefs.

THE ORANGE AND YELLOW IDEATOR

Ideators are driven by self-expression and artistry and by a need to innovate. They long to imagine and conceive of ingenious ideas and to share these ideas with anyone who may listen. Ideators work out the details and intricacies of each new concept and envision the breadth of possibilities that can come from it. Their ultimate goal is to rouse their contemporaries to join them on a noble mission to collectively and creatively convert the ordinary into the extraordinary.

PERSONAS WITH A PRIMARY YELLOW INNOVATOR ARCHETYPE

THE YELLOW AND BLUE VANGUARD

Vanguards are driven to invent the future through innovation and by growth and being frontrunners. Always at the forefront of new concepts, ideas, and strategies, they set a benchmark that they believe others should aspire to. Known for great imagination, insight, and boldness, Vanguards are skilled at navigating and distilling complex and dynamic social and political systems. They form intelligent strategies and put them into practice to propel transformation and set the standards of tomorrow.

THE YELLOW AND MAROON INVENTOR

Inventors are driven to innovate and by a need to overcome challenges. They tirelessly toil to devise the new and novel. They take an ingenious approach to their work and conduct exhaustive experiments to arrive at their next breakthrough. While others are content to daydream or speculate about the future, Inventors are driven to create it. When challenges arise, they push through them, seeing both the joy and duty in putting in the hard work that developing leading-edge solutions requires.

THE YELLOW AND GREEN THEORIST

Theorists are driven to invent the future through innovation and by the quest for the unknown. They form astonishing opinions and theories within their own mind but do not always go so far as to test them against reality. Intellectual, systematic, and logical in their thinking, they possess a natural ability to connect the dots. Their aspiration is to understand everything, but in their journey to do so, they may learn the value of intuition and embrace that which cannot be fully explained or known.

THE YELLOW AND ORANGE ORIGINATOR

Originators are driven to innovation, self-expression, and artistry. Their imaginative and creative tendencies lead them to inventive ideas and undertakings. Spontaneous, passion-driven, and full of inspiration, Originators perform best in unstructured situations. It is within the chaotic act of creation that they truly come alive and find the space to try out their original ideas.

THE YELLOW AND PINK DREAMER

Dreamers are driven to innovate and by experience, elegance, and beauty in all forms. With heads often in the clouds, they are quite content to muse over ideals. Believing that anything is possible, they intuit and imagine new ways to refine or perfect the world. Dreamers' primary aspirations are to share their visions for a better world, and then inspire others to build it.

THE YELLOW AND PURPLE ORACLE

Oracles are driven to innovate and by a need to compassionately care for others. Oracles have been gifted with the rare gift of foresight, perceiving opportunities and conceiving of ideas that help improve the world around them. They voice their ideas to all who are willing to listen and are apt to rally support for a cause. They have a knack for forecasting the future and the effect that any given action might have on humanity. Oracles are deeply empathetic and sensitive and take great care to share their gifts in ways that meaningfully shape society.

THE YELLOW AND RED FUTURIST

Futurists are driven to invent the future and by a desire to cause others to get excited. Their zest and zeal for life is strongest when thinking about the future and all the possibilities it contains. Their view of tomorrow is optimistic, full of promise and boundless in joy. Futurists adopt a rosy outlook that overlooks any potential downsides and they come most truly alive when collaborating with others to brainstorm new and exciting ideas.

THE YELLOW AND SILVER REFORMER

Reformers are driven to innovate and by a desire to challenge the establishment. They work for and advocate change, even if it flies in the face of established wisdom. While some may interpret their cry for renewal and rebirth as nothing but nostalgia, Reformers possesses the wisdom of hindsight and see potential where others have become complacent. While they are prone to see the world as full of flaws, they are uniquely able to rouse and guide humanity back to its essential self.

THE YELLOW AND YELLOW PRODIGY

Prodigies are singularly driven to invent the future through innovation. They are built from a depth of Yellow so pronounced that it overwhelms any other Archetype. Their personality manifests positive Yellow traits such as being transformative, forward-thinking, and ingenuity extrapolated to the extreme. These usually favorable Yellow traits are so dominant that they could become faults if Prodigies do not carefully manage their strength and expression.

PERSONAS WITH A PRIMARY RED ENTERTAINER ARCHETYPE

THE RED AND BLUE MOTIVATOR

Motivators are driven to entertain and excite others and by growth and being frontrunners. They possess compelling charisma and charm that mobilize others toward a great cause or just a great time. Motivators are strongly perceptive and able to read others' energy levels. They lend their powerful yet positive influence to help others find balance in life and progress toward their goals.

THE RED AND MAROON DYNAMO

Dynamos are driven to cause others to get excited and by a need to overcome challenges. They are forceful and energetic individuals who are not shy in making their presence felt. Whether on the sidelines or in the fray, their presence and energy is palpable. Dynamos are friendly, generous with their attention, and confident in their own and their peer's abilities. As natural leaders, Dynamos lend their impressive willpower to others so that all might overcome their personal obstacles. They are quick to enter a competition or contest, confident in their ability to win.

THE RED AND GREEN THRILL-SEEKER

Thrill-seekers are driven to cause others to get excited and by the quest for the unknown. They purposefully seek out and enjoy risk-laden activities and adventures. They feel most alive when truly present within any intense experience, as adrenaline courses through their veins. These real-world experiences not only satisfy Thrill-seekers' cravings for constant excitement, but inspire deep reflection and perspective that is hard to come by any other way.

THE RED AND ORANGE PERFORMER

Performers are driven to cause others to get excited and by self-expression and artistry. They are most engaged when in front of an audience. As self-proclaimed stars, they carry out a playful rendition of life full of color and energy. With a robust imagination, Performers see the promise and possibility for fun in everything and delight others with their original stories, reenactments, and improvisation. They dedicate much energy to honing their craft, reworking their productions for maximal effect and impact.

THE RED AND PINK ENTHUSIAST

Enthusiasts are driven to cause others to get excited and by experience, elegance, and beauty in all forms. They are ardent supporters of people and causes and enthusiastically devote themselves to the pursuits they believe in. They radiate joy, laugh freely, and bring a zest for life to everything they do. Enthusiasts are sensitive to any uncomfortable or unwelcome tension in a room and deploy humor as a happy distractant. They use their charisma and dynamic energy to uplift others out of tough moments and to muster them toward a greater purpose.

THE RED AND PURPLE EMCEE

Emcees are driven to entertain and excite others and by a compassionate need to care for others. They draw energy and inspiration from the people around them. They possess a natural ability to read a room and the people within it, and use that insight to perform in ways that leave others feeling moved and uplifted. While Emcees are skilled at capturing the attention of others, they are not protective of the stage but invite others to join them in the spotlight.

THE RED AND RED COMEDIAN

Comedians are singularly driven to entertain and cause others to get excited. They are built from a depth of Red so pronounced that it overwhelms any other Archetype. Their personality manifests positive Red traits such as being engaging, enthusiastic, and energetic extrapolated to the extreme. These usually favorable Red traits are so dominant that they could become faults if Comedians do not carefully manage their strength and expression.

THE RED AND SILVER DAREDEVIL

Daredevils are driven to cause others to get excited and by a desire to challenge the establishment. They are reckless, bold, and pursue activities that demonstrate their daring bravado. Known for their spirited antics, Daredevils take on the greatest risks without regard for the safety of themselves or others. Hurling themselves at the boundary between right and wrong is not just thrill-seeking behavior, but their way to confront long-held traditions and challenge the conventions of the day.

THE RED AND YELLOW MAGICIAN

Magicians are driven to entertain and cause others to get excited and by a need to innovate. They make incredible things happen, tapping into boundless potential to bring to light what others thought was impossible. Their insight into what is possible infuses them with the enthusiasm and comfort to pursue and enact change. A Magician's flair for showmanship leads them to playfully dramatize the extraordinary act of transformation.

PERSONAS WITH A PRIMARY BLUE ACHIEVER ARCHETYPE

THE BLUE AND BLUE EXECUTIVE

Executives are singularly driven by growth and being frontrunners. They are built from a depth of Blue so pronounced that it overwhelms any other Archetype. Their personality manifests positive Blue traits such as power, assertiveness, confidence, and influence extrapolated to the extreme. These usually favorable Blue traits are so dominant that they could become faults if Executives do not carefully manage their strength and expression.

THE BLUE AND MAROON CHAMPION

Champions are driven by growth, being frontrunners, and overcoming challenges. They are the first to battle on behalf of the needs, rights, and honor of others. Just the same, they strive to maintain a healthy and productive headspace, combating their own negative thoughts and patterns to stay positive and focused on the task at hand. Champions pledge themselves to value-oriented missions and strive to succeed at all costs. A determination to prevail causes admiration in those who appreciate the commitment and stamina it takes to win.

THE BLUE AND GREEN CAPTAIN

Captains are driven by growth, being frontrunners, and by a quest for the unknown. They wield immense influence along each step of a journey due to their natural cool-headedness and single-minded orientation toward objectives. They navigate turbulent and challenging times with confidence. A Captain's wealth of experience and strong sense of self-control equips them to develop sound strategies and lead others down an exciting yet steady path.

THE BLUE AND ORANGE DIRECTOR

Directors are driven by growth, being frontrunners, and by self-expression and artistry. They are both boldly self-assured and ambiguous when translating their creative vision, being one part leader and one part imaginative artisan. They are most comfortable operating from a vantage point of 10,000 feet, adopting a big-picture perspective and musing upon their creations. Directors balance this tendency with concrete and ordered decision-making, where needed, to bring order to many tangible and intangible moving parts.

THE BLUE AND PINK PRODUCER

Producers are driven by growth, being frontrunners, and by experience, elegance, and beauty in all its forms. They bring forth timeless ideas and concepts and confidently share them with others. When they aspire to achieve something or pursue a high calling, they continue toward that goal until it is perfected and ready for the grandest of stages. A Producer's commitment to tradition, their idealism, and their ability to propel all that is around them to perfection guarantees that any project in which they are involved is executed according to schedule, with finesse, and to the utmost quality.

THE BLUE AND PURPLE MENTOR

Mentors are driven by growth, being frontrunners, and by a need to compassionately care for others. They are known for their capacity as wise and trusted guides whose direction and genuine care empower others on their journeys. Naturally friendly and influential, Mentors pay close attention to the feelings, needs, and wants of others and look for opportunities to lend a helping hand. Much of a Mentor's fulfillment in life comes from propelling others to fulfill their own aspirations. They charge into community-rich environments and provide a reliable support system for all those who might benefit from it.

THE BLUE AND RED COACH

Coaches are driven by growth and being frontrunners, and a desire to excite others. With boundless reserves of enthusiasm, they train and push others to accomplish their goals, while simultaneously meeting their own. As natural mentors, encouragers, and promoters, they inspire others to give their very best. Coaches bring rigor and vigor to every part of their life and take seriously the responsibility of inspiring others to pursue collective success.

THE BLUE AND SILVER MAVERICK

Mavericks are driven by growth, being frontrunners, and by a desire to challenge the establishment. They are independent thinkers who seek to set their own agenda and chart their own course. They possess great integrity, assured of who they are and rejecting any of society's labels or constraints. Mavericks are comfortable taking outsized risks to move to the front of the pack. They may find themselves torn between their need to achieve publicly laudable deeds and their individualistic desires to reject expectations and conventions and instead act as they will.

THE BLUE AND YELLOW VISIONARY

Visionaries are driven by growth, being frontrunners, and by a need to innovate. They possess foresight, imagination, and the ambition to bring their insights to life. As natural leaders, they are comfortable with uncertainty and the risk of failure, and are willing to bet it all to pursue the future of their dreams. Strategic and assertive, once they've set their sights on something, others can count on Visionaries to lead them to a better tomorrow.

PERSONAS WITH A PRIMARY PINK SOPHISTICATE ARCHETYPE

THE PINK AND BLUE CONNOISSEUR

Connoisseurs are driven by experience, elegance, and beauty in all forms, and by growth and being frontrunners. They have a sophisticated and discerning palate, and can pass judgement on the qualities of a thing with great expertise. Their extensive knowledge combined with their exquisite taste allow them to take in the whole picture while also perceiving every detail. Connoisseurs are self-aware and are quick to recognize their place and purpose in society. Their perceptions and judgements preserve ideals, continue established traditions, and serve to build a lasting legacy for future generations.

THE PINK AND MAROON PERFECTIONIST

Perfectionists are driven by experience, elegance, and beauty in all forms and by a need to overcome challenges. Their exacting standards for excellence push them to chase what is ideal, labeling anything short of perfection as unacceptable. Perfectionists perform with the highest of potential, devoting themselves to their craft and the mastery of every task entrusted to them. They firmly believe that their uncompromising dedication to the ideal will drive them to greatness and victory.

THE PINK AND GREEN PHILOSOPHER

Philosophers are driven by experience, elegance, and beauty in all forms and by the quest for the unknown. They are abstract thinkers who seek wisdom and enlightenment through a study of knowledge, truth, and life's meaning. Methodical and systematic in both thought and action, they bring a refined approach and perspective to the contemplation of complex questions and their answers. Philosophers are measured and meditative in their grasp of big-pictures issues, believing enlightenment can be reached through understanding the fundamental laws of nature.

THE PINK AND ORANGE VIRTUOSO

Virtuosos are driven by experience, elegance, and beauty in all forms and by self-expression and artistry. Their dazzling skill holds others spellbound as they perform with dignity and grace. Able to tap into timeless pools of classic knowledge, Virtuosos astonish audiences with their ability to broaden minds and unleash creative potential. While they are naturally gifted, Virtuosos meticulously practice and refine their art until it is poised, polished, and ready for performance.

THE PINK AND PINK PURIST

Purists are singularly driven by experience, elegance, and beauty in all forms. They are built from a depth of Pink so pronounced that it overwhelms any other Archetype. Their personality manifests positive Pink traits such as idealism, charm, and sophistication extrapolated to the extreme. These usually favorable Pink traits are so dominant that they could become faults if Purists do not carefully manage their strength and expression.

THE PINK AND PURPLE IDEALIST

Idealists are driven by experience, elegance, and beauty in all forms and by a need to compassionately care for others. They hold fast to a vision of a world that provides the most benefit for all, regardless of practicalities. While Idealists value harmony and stability in their work and life, they will welcome and nurture change if it supports a worthy cause. They believe in the inherent good of humanity and trust that through everyone's positive contributions, society will progress and all will be well.

THE PINK AND RED AFICIONADO

Aficionados are driven by experience, elegance, and beauty in all forms, and by a desire to cause others to get excited. They pursue their passions and interests with great devotion and enthusiasm. They meticulously commit themselves to their pursuits, not for status or mastery, but because they find them compelling in all their dynamism. Activities are neither a hobby or pastime, but a passionate calling to be cherished for a lifetime.

THE PINK AND SILVER REFINER

Refiners are driven by experience, elegance, and beauty in all forms and by a desire to challenge the establishment. They approach all pursuits intending to purify and restore what society has degraded, and look to no one for permission to do so. Seeking purity and excellence, they strive to improve all they can, even those things others already perceive as perfect. Refiners approach their work with high ideals and expectations, urging others to also desire what can be, rather than what currently is.

THE PINK AND YELLOW TRENDSETTER

Trendsetters are driven by experience, elegance, and beauty in all forms and by a need to invent the futurenovate. They dream up novel ideas and make them popular among the masses. They are very intuitive and can perceive what is missing in society, and then set to the task of creating it. Trendsetters are able to envision and conceive clear ideas of what is best, and they introduce new styles and set trends that have far-reaching effect.

PERSONAS WITH A PRIMARY SILVER REBEL ARCHETYPE

THE SILVER AND BLUE RINGLEADER

Ringleaders are driven to challenge the establishment and by growth and being frontrunners. They are natural activators and inspire others to rally in support of unconventional ideas. They are confident, courageous, and assertive when in command, using position and status to provoke audiences to carry out radical change. Ringleaders are known for their enthralling demonstrations of mastery and power, always insisting on taking center stage.

THE SILVER AND MAROON INSTIGATOR

Instigators are driven to disrupt the norm and by a need to overcome challenges. They cause others to question even their most sacred beliefs and convictions by stirring up latent feelings of discontent with "the establishment." Relentless and tenacious, they goad, provoke, and urge others until a point is reached where all are ready to take action. The end goal of their aggressive agitation is not anarchy, but a restructuring of convention and wisdom.

THE SILVER AND GREEN ROGUE

Rogues are driven to challenge the establishment and by the quest for the unknown. They get lost in their own thoughts as they probe ideas and opinions forming humanity's wild frontier. Comfortable with chaos, they are quick to question the status quo and purposefully push the envelope. Rogues enjoy challenging the ideas and beliefs of others, but always to enliven discourse, dive deeper into truth, and maybe someday find it.

THE SILVER AND ORANGE RENEGADE

Renegades are driven to challenge the establishment and by self-expression and artistry. They reject lawful and conventional behavior and seek opportunities to showcase their own unique way of doing things. A Renegade's non-conformist attitude means they create and express themselves in the most revolutionary of ways. Their wild and messy creative impulses often lead them down a path of solo artistry that is free of rules, propriety, or boundary.

THE SILVER AND PINK INDIVIDUALIST

Individualists are driven to challenge the establishment and by experience, elegance, and beauty in all forms. They are quite comfortable pursuing independent courses of thought or activity, even to the point of detaching from the people around them. With lofty dreams of tomorrow, Individualists reconsider society's conventions and seek for higher principles beyond prescribed limits or established bounds. After considerable review, Individualists advocate for timeless and sublime ideals that the world may have forgotten or foolishly rejected.

THE SILVER AND PURPLE ACTIVIST

Activists are driven to challenge the establishment and by a need to compassionately care for others. They support bold and brazen action around controversial issues, either through radical support and devotion or organizing staunch opposition. They seek to free anyone who is oppressed or held back by a broken system, and charge boldly into conflict to make that happen. Activists empower people to stand alongside them and advocate for causes that may be unpopular, obscure, or systemic within society.

THE SILVER AND RED ROCK STAR

Rock Stars are driven to challenge the establishment and by a desire to entertain. Due to their commanding presence, star reputation, and alluring personality, many admire Rock Stars and covet their attention and devotion. With mountains of energy and boundless enthusiasm, Rock Stars chase what fascinates them, treating the world as their wild and crazy playground. Around each corner they glimpse tantalizing and boundless opportunities for adventure.

THE SILVER AND SILVER REVOLUTIONIST

Revolutionists are singularly driven to disrupt the norm and challenge the establishment. They are built from a depth of Silver so pronounced that it overwhelms any other Archetype. Their personality manifests positive Silver traits such as independence, unconventionality, and daring-do extrapolated to the extreme. These usually favorable Silver traits are so dominant that they could become faults if Revolutionists do not carefully manage their strength and expression.

THE SILVER AND YELLOW FREE-THINKER

Free-thinkers are driven to challenge the establishment and by a need to innovate. Happily at home within their own thoughts, they are prone to speculate and form their own opinions, regardless of the facts or authority of others. Free-thinkers value autonomy above all and believe that everyone should slash any constraints that bind imagination. Living into this value, Free-thinkers arrive at powerful and unexpected connections with the potential to shift the status quo in big ways.

TRIADIC MOTIVATION MODEL & THEORY

As crucial as it is to understand who you are—your Archetypes, your core Persona, and even those traits that drive you absolutely crazy—it is equally important to understand why you are.

Some come to this understanding through decades of soul-searching, striving to answer such questions as “What is the meaning of life?” and “What is my purpose?” Others adopt a perspective that purpose can be found through what you devote your energies to and how you do so. CarnegieChem® is constructed on the principle that one does well to pursue their purpose in ways that align with their core sense of self. Actions do not exist in a vacuum, independent of who you are and the realities of this world, and so, at the core of the CarnegieChem® philosophy is the premise that:

Your actions and behaviors are fueled by a mix of Triadic Motivators—Strength, Creativity, and Vitality. These Motivators guide your perspectives, self-identity, and how you show up in this world.

IF YOU HAVE A HIGH STRENGTH MOTIVATOR:

You are likely to be daring, powerful, and resilient. Personas with a high Strength Motivator can be assertive, tenacious, and at times rebellious. If you possess a significant expression of Strength, you may be fueled by the desire to disrupt the norm, a need for growth, and the act of overcoming challenges. Some of your secondary aspirations may include challenging the establishment, being a frontrunner, or demonstrating grit and determination. The deep and authentic use of your Strength Motivator is likely to inspire admiration within others.

IF YOU HAVE A HIGH CREATIVITY MOTIVATOR:

You are likely to be creative, adventurous, and illustrious. Personas with a high Creativity Motivator can be imaginative, inquisitive, and transformative. If you possess a significant expression of Creativity, you may be fueled by the act of self-expression, questing toward the unknown, and a need to invent the future. Your secondary aspirations may include showcasing your artistry or innovations. The deep and authentic use of your Creativity Motivator is likely to inspire amazement in others.

IF YOU HAVE A HIGH VITALITY MOTIVATOR:

You are likely to be sophisticated, cheerful, and supportive. Personas with a high Vitality Motivator can be refined, enthusiastic, and often selfless. If you possess a significant expression of Vitality, you may be fueled by your many life experiences, the joy of entertaining, and the act of showing others compassion. Some of your secondary aspirations may include the pursuit of beauty in numerous forms, generating excitement in others, and caring for all. The deep and authentic use of your Vitality Motivator is likely to inspire a sensation of ecstasy in others.

SO WHAT MOTIVATOR DEFINES YOU & GUIDES YOUR ACTIONS?

The real answer? All of them. CarnegieChem® has found through its research that due to the complexity of human nature, a person’s world belief and actions are not singularly defined but rather determined and shaped by a unique blend of all three Triadic Motivators. Since you’re already familiar with the idea of Archetypes, and your personality profile has shown the degree to which you express all nine, it may not surprise you that each

Archetype is also correlated with particular Motivators. As a result, your unique Triadic Motivator mix is determined by your total Archetype expression (check out the Archetypes tab to learn which Archetypes are tied to which Triadic Motivators).

While your Archetypes and Persona help establish who you are, the Triadic Motivator mix reveals what motivates you and the actions you take. All three Triadic Motivators shape your worldview and actions to some extent. While some Motivators are more primary than others, with conscious efforts, you can choose which Motivator will drive your actions in any given moment. You may use your Strength Motivator most when interviewing for a new job, your Creativity Motivator most when cooking for your family, or your Vitality Motivator when enjoying a night on the town with friends. The varying depths of your Motivators indicate which of the three you are more likely to default to in most engagements.

Your daily tasks, activities, and responsibilities may, at times, require you to leverage your least prominent Motivator. However, going back to the premise that alignment fuels authenticity, it is worth minimizing the continual use of the least prominent Triadic Motivator because not only will such use risk being perceived as inauthentic and misaligned, but it also can be exhausting and challenging too.

Your CarnegieChem® results should help you name and understand the unique blend of Motivators you possess. It'll help you identify any subconscious traits or tendencies tied to your Motivators that could be detrimental to your efforts to accomplish certain tasks or deal with certain types of people. Ideally, a clearer understanding of the motivations that guide your actions and identity will equip you to make smarter and more fulfilling choices.

If you choose to share your personality profile results with colleagues, mentors, or even loved ones, you will be able to use the Triadic Motivator model in another exciting way. For example, you will find yourself better able to comprehend why others might act the way they do. The intent of the Triadic Motivator model is to provide a lens that brings greater focus and understanding to your place and relation to others–an understanding that can help bridge divides and differences and foster more authentic relationships.

The CarnegieChem® "Motivation Similarity Theory" suggests that shared or convergent Motivators should foster understanding between individuals. As an example, when a Confidant Persona with a Primary Vitality Motivator and a Secondary Strength Motivator encounters a Theorist Persona with a Primary Creativity Motivator and a Secondary Vitality Motivator, their shared Vitality Motivator should allow them to better relate and connect with one another.

Even when interacting with those who may have not yet taken the CarnegieChem® diagnostics, try using the Triadic Motivator model to establish shared identity and form a stronger bond. You will begin to notice that every action or decision can be traced to one or some combination of the three. You soon find yourself thinking: "I did ___, because of my Strength Motivator." or "Brooklyn always acts this way, I bet she has a Primary Vitality

Motivator and doesn't even know it!"

THE SIX PERFORMANCE ZONES

WHAT ARE PERFORMANCE ZONES?

Actions, by nature, never occur independently of who you are. They are influenced both by your authentic self and by the physics and metaphysics of the world. Psychologist Carl Jung proposed a grand archetypal plan—"Stages of Life" as he called it, that describes the types of actions you might take during the various stages of our lives. These actions, when viewed through Jung's plan, can be said to be motivated by both specific internal directives and external guidelines. Jung proposed that individuals might cycle through the stages repeatedly, returning again and again to specific stages in an effort to grow in both their outlook and understanding of self and the world around them.

Similarly, CarnegieChem® posits you must successfully travel through Six Performance Zones in order to gain a true understanding of who you are and connect with others in the most meaningful ways.

These Six Performance Zones are as follows:

Internal Zones

* Personification Zone
* Personality Zone
* Persona Zone

External Zones

* Precision Zone
* Pack Zone
* Perception Zone

The first three are explored individually within your inner self, while the final three are explored through your encounters with others in the external world. The more understanding you gain of your core self within the inner zones, the easier you will find it to begin journeying into the external zones

Each zone possesses its own call, which for those who choose to answer it, manifests through an invitation to gain some impactful realization about themselves. The more an individual is able to rise to the occasion in answering each call, the easier it will be for them to cross the threshold into each of the next zones. The call of the three internal Performance Zones, each of which must be answered before progressing to the next Performance Zone, is as follows.

INTERNAL ZONES

The Personification Zone is a highly ambiguous and chaotic place from which infinite human potential springs forth. Within the Personification Zone, it is through the act of discovering your intrinsic self from the sea of possible personality types that you are able to rise to its call and discover yourself.

The Personality Zone is where, upon discovering your true self, you begin to assemble the most authentic and reflective elements of your personality. Within the Personality Zone, it is in the act of determining how you will express your personality, both within yourself and to those you'll encounter within the external zones, that you can rise to its call and express yourself.

The Persona Zone is where you select the Persona that you will exhibit in the external zones. Within the Persona Zone, it is through the careful consideration of all possible Personas and the selection of one to don within external Performance Zones that you are able to answer its call. While you can adopt any Persona, adopting the one most authentic to who you are will bring you the most satisfaction and success.

Once you have successfully answered the call of each of the internal Performance Zones (discovering yourself, expressing yourself, and adopting your Persona), you will be ready to venture into the external Performance Zones. The call of each of the three external Performance Zones is as follows.

EXTERNAL ZONES

The Precision Zone is where you assess whether the Persona that you have adopted will permit you to navigate through the following zones with integrity and endurance. Within the Precision Zone, it is through being consistent in the manner in which you express and represent yourself that you are able to answer its call.

The Pack Zone is where through the Persona you elect to portray, you first come into contact with the Personas and identities that others have chosen to portray. Within the Pack Zone, it is through interacting and connecting with others and even competing and forming healthy rivalries that you are able to answer its call to interact and compete.

The Perception Zone is where you encounter feedback, either constructive or critical, from those you encounter. Others may judge the Persona that you have elected to portray and you have a choice in how you will respond. Within the Perception Zone, your response to feedback enables you to answer its call, either changing who you are to accommodate their feedback or disregarding it altogether, firm in the belief of who you are.

Once you've answered the call of each of the Six Performance Zones, you can rest assured that you are living and interacting within a particular moment that is true to who you are. However, just as Carl Jung asserted in his “Stages of Life” philosophy, the Six Performance Zones must similarly be experienced and repeated many times in the course of your personal development. While your response to the feedback encountered within the Perception Zone may reinforce your identity, you will still have to journey through each of the Six Performance Zones to guarantee that identity remains authentic in future scenarios and life experiences. Repeated exposure to, and adventure within, each Performance Zone will improve your decision-making and shape your beliefs and values with greater confidence and certainty.

With that said, there are certainly ways to expedite your journey through Zones. For example, you can use the identification and understanding of your authentic personality made possible by CarnegieChem® to speed through the Personification Zone. Likewise, the act of making decisions that consistently reflect your true personality can help you progress more rapidly through both the internal Personality and external Precision Zones.

It is ultimately the repeated progress through and experiences within the Six Performance Zones that determines how successfully you live into your authentic self, with all its rewards and relationships. A lack of progress is likely to give way to internal struggles, growing discontent, confusion, and even exhaustion. Without meaningful progress, you might not only lose sight of yourself but even lack the willpower necessary to make any change.

To embark on your journey through the Six Performance Zones and live a more authentic life, head on back to your personality profile, learn from its insights, and rise to answer each zone's call in your day-to-day interactions in the world.

GROUP DYNAMICS

CarnegieChem®'s curriculum not only defines who you are as an individual, it also explores how you might best engage and interact with the people around you. CarnegieChem® considers everyday relational dynamics and how your unique personality might relate to the diverse personalities of others.

A group should be thought of as a collection of thousands of human characteristics and dynamics constantly intertwining and interacting to achieve common goals. If you aspire for your groups to be healthy and happy, start by understanding the diverse personalities of each member. While each member brings their own distinct personality to the table, in turn, the group collectively develops its own ideas and perceptions about each member. The group's perception of a member, if unaligned with what that member actually believes to be true, can greatly detract from the success of that individual and even the group at large. CarnegieChem®'s archetypal personification theory equips you with the ability to objectively evaluate group member strengths and weaknesses, preferences, motivations, and desires, and utilize these insights to position yourself and your group for greater success.

Early research into group and team dynamics suggest that groups or partnerships form when individuals realize their shared goals or tasks and decide that working together is more beneficial than working alone. Group development theory describes four stages that a group goes through in order to arrive at its desired goal or outcome. They are: forming, storming, norming, and performing. Efforts to understand one another should occur through all four stages as group dynamics shift, goals change, and expectations realign. This means that evaluating group dynamics should not be viewed as a one-time undertaking. Repeated and routine efforts are needed to understand one another. By committing to understand the members in your groups, you will be able to better share your values, pursue your goals, and forge lasting relationships that are built on empathy and trust.

ATTRACTANTS & MODES OF CONNECTION

People are multifaceted by nature. You don't have just one personality trait; you have a multitude. These traits are accompanied by many faults, perceptions, motivators, and values, all working together to guide your actions and behaviors. Because you are so uniquely complex, so are the ways that you can choose to communicate. These include the images you share, stories you tell, and the way you feel and engage emotionally with the world around you. When you approach how you communicate in ways that are aligned with who you authentically are, such decisions can give you positive energy and confidence, because they agree with who you are at your core. However, when made in a haphazard fashion they can actually whittle away at who you are, and make it hard for others to perceive you in the right fashion. With your newfound understanding of Archetypes and Personas, you can begin to communicate in ways that resonate at your core, and in a voice that is uniquely yours.

At the core of CarnegieChem®'s archetypal theory and approach to group and interpersonal dynamics is a belief that people are attracted to those personality traits that are most familiar and comfortable to them. Carnegie Dartlet's National Archetype Index, a wide-ranging assessment of thousands of people, found that when it comes to attractants, you're most likely to like that which is similar to yourself.

Take, for example, Personas that are built from the Orange Creator Archetype. They are apt to enjoy associating and spending time with other individuals who possess a creative or original streak (unless they foolishly believe that no one's artistic expressions could ever match theirs). Similarly, Personas built from the Purple Provider Archetype have been shown to like spending time with others that are by nature, nurturing to friends, empathic, and sensitive. Conversely, Personas whose Least Archetype is the Red Entertainer Archetype are not likely to respond positively to messages shared in an energetic, humorous, and playful way, and may even reject the message entirely without actually hearing its true meaning. This reaction and rejection may extend from entertaining and exaggerated personal anecdotes to advertising from Red Entertainer brands like Skittles® or Old Spice.

Preference for certain types of messages, their tone, and style, are defined by CarnegieChem® as attractants. Communication methods that are negatively received or even rejected are called deterrents. CarnegieChem®'s Modes of Connection model illustrates nine positive ways that an individual or group can choose to communicate and connect with others. It asserts that each one of CarnegieChem®'s nine Archetypes can potentially be expressed through nine Modes, which should be understood as those methods that highly persuasive people or organizations use to connect with others authentically and build large and healthy followings and communities.

All nine Modes of Connection invite those you communicate with to join in taking some action. They may invite your audience to “create with you” in artistic, imaginative, and original ways or to “defy with you” in daring, rebellious, or even fearless ways. Although you can elect to communicate through any of the nine Modes to drive greater resonance and reception of your cause or story, each Mode correlates closest with one particular Archetype.

These nine Modes and their correlated Archetypes are as follows:

* Care with me - The Purple Provider
* Explore with me - The Green Explorer
* Strive with me - The Maroon Competitor
* Create with me - The Orange Creator
* Invent with me - The Yellow Innovator
* Enjoy with me - The Red Entertainer
* Achieve with me - The Blue Achiever
* Refine with me - The Pink Sophisticate
* Defy with me - The Silver Rebel

For example, the Green Explorer’s natural Mode of Connection is an invitation to “explore with them.” Those who authentically connect in this way invite others to be curious and boldly venture with them into the unknown. Brands with an authentic Green Explorer identity use the “explore with me” mode to reflect how intensely mission-driven they are and to foster in others a sense of adventure and intrigue. They tell the story of their quest to create experiences and pathways to ongoing discovery.

While all Modes of Connection are theoretically open to you and you may choose to communicate through a particular Mode to drive greater resonance and understanding in your audience, attempting to be all things at all times to all people detracts from any one clear and authentic expression. It risks diluting or obscuring your message and making it entirely unbelievable. Communicating through a single Mode of Connection at a time, particularly those that most often represents your intrinsic self, enables you to share deeper and truer communications and form more resilient relationships and connections throughout life.

Make sure you’re telling a story that reflects who you are and who you’re actively aspiring to be.

The 7-Schema assessment, one of CarnegieChem®'s primary diagnostics, determines your position along seven spectrums of core human performance factors. Each of the seven core factors constitutes two-component scales, creating a fourteen-point measure of human performance.

The 7-Schema diagnostic assesses:

1. Certainty: your comfort with ambiguity and your risk tolerance
2. Motivation: how likely you are to seek out external recognition and accolades from your mentors and team members and how likely you are to launch a new initiative or project on your own accord
3. Receptivity: how strongly you value feedback or input from others and how you respond to critical feedback from leaders
4. Regulation: your perception and understanding of your emotions and how well you manage your mood when interacting with others
5. Adversity: your determination to persist through challenges or failure and how well you manage stress, pressure, or strain
6. Reliance: the trust you have for others working toward a similar goal and your comfort depending on their contribution
7. Connection: your desire for engagement and interaction with others and your level of competitiveness and need to best them

Your 7-Schema results can be accessed through the My Profile tab and your score for each schema is displayed on a spectrum that ranges from low to moderate to high. Your position on the spectrum is accompanied by an explanation of what that position means and how it shapes both your core identity and your interactions with others. While you may rank low in one schema, your colleague may rank high. Differences between positions do not determine the value of your working relationship but reveal ways in which you might best work with one another. There are times and situations where it may make sense to group team members together based on their similarities or centralize certain members around a common goal based on their differences. CarnegieChem® promotes the potential value found in both strategies. Any relationship or connection, whether in the workplace, home, or other group settings, can benefit from an increased diversity of personality and perspective.

Within groups, it can be quite beneficial to see a diversity of scores across the 7-Schema. For example, if three out of five group members show to have a very high initiative and a high level of comfort taking risks, having two group members with lower scores on this same Schema can help to provide checks and balances in decision-making and ensure a higher likelihood of success. Within any relationship, as with anything, it is all about balance and equilibrium.

Your 7-Schema results will likely show a mix of low, moderate, and high positions. No position on the spectrum is necessarily better or more desirable than any other. It's much like chemistry, which posits that the strength of a molecular compound is found in many different elements working together to form something greater. The unique components of your identity, your groups, your relationships, and your teams are the same way.

Head on back to your personality profile to review your 7-Schema results or to the Team Portal section to compare your results with others.

CARNEGIECHEM®'S SIMILARITY THEORY

Humans find great comfort in the familiar. If you're like most people, you are drawn to people that are like you in beliefs, backgrounds, and even appearances. You might buddy up with those who dress like you, act like you, laugh at the same jokes, and share your political views. In other words, people are conditioned to associate with those most like themselves. This phenomenon of attractants is so well-established and acknowledged within psychological circles that it is known as "the affinity bias."

The reason people act in a way that only furthers any affinity bias is that it is comfortable, easy, and self-affirming. For example, if you love country music and surround yourself with those who share that same passion, you will likely find acceptance, form some great relationships, and experience an all-around good time. CarnegieChem® recognizes the affinity bias but teaches that there is value in both similarities and differences, or rather convergences and divergences, between you and your colleagues or group members. They are what make anyone distinct from anyone else.

CarnegieChem® makes use of a proprietary, statistical comparison model and algorithm that generates personalized reports of those group members who are convergent and divergent from yourself. Raw data from the 7-Schema human performance assessment, Archetype personification, traits, and weaknesses are compressed, normalized, and then assigned a weight. Within the Similarity Scores tab of the Team Portal section, you will be able to compare your personality to that of others and find out those group members to whom you are most alike or most distinct. The insights that can be gained from Similarity Score results can help to reveal patterns and norms within your relationships. They should be harnessed to help you to understand others better, work better together, and inform potentially greater collaboration.

Let's imagine that a group has been assembled containing all seven of the below personalities. Let's examine it from the vantage of The Confident Guide:

the vantage of The Servant Leader

In this example, let's presume The Confident Guide scored most statistically similar

(convergent) to:
* The Spirited Challenger - (0.63)
* The Curious Innovator - (0.68)
* The Relentless Idealist - (0.73)

And least statistically similar (divergent) to:
* The Inventive Rebel - (1.39)
* The Supportive Explorer - (1.35)
* The Daring Artist - (1.21)

Within your own results, the lower the Similarity Score, the more convergent you are with that individual and the higher the more divergent. Rather than these scores revealing who you, or The Confident Guide in this example, works with best, they should instead be used to provide insights into the diversity between members and foster opportunities to form more strategic, intentional, and constructive relationships.

There is value in realizing opportunities to connect over shared similarities and convergent personalities. However, just as a group benefits from the more dispersed distribution of its member's 7-Schema positions, there are well known benefits and exciting opportunities that can only be found in groups with greater amounts of diversity.

Head on over to the Similarity Scores tab of the Team Portal section to see where you and your peers converge and diverge. Use these insights to begin to approach goals, initiatives, and your inter-relationships with greater intentionality.

THE POWER OF DIFFERENCES WITHIN GROUP DYNAMICS: GROUPS BENEFIT FROM THE INCREASED DIVERSITY OF PERSONALITY & PERSPECTIVE

Constructed from over 35 years of industry leadership and pace-setting innovation, CarnegieChem® has created the only personification model of its kind to bring you and thousands of others access to cutting-edge individual and group diagnostics. The insights these diagnostics yield equip you to interact, engage, and even partner with others better to achieve your goals and aspirations.

As a collection of personalities, groups should be considered living and evolving beings. As such, they, and their members thrive or suffer based on a complex web of inputs and outputs from their peers and leaders. Often, whether a group and its dynamics bolster and support the well-being of each member is determined based on the true personalities of its members and the ways that they interact and connect with each other.

CarnegieChem®'s philosophy suggests that groups can benefit greatly from those divergent aspects of its members' core identities and should strive to increase a group's level of divergence rather than aspire to form like-minded groups that only support convergent

personalities.
There are many benefits that a group can realize if it is able to increase the diversity of its members' personalities and perspectives. This is true in the workplace, in school, in the studio, and everywhere else groups form. CarnegieChem® diagnostics identify and highlight the diversity in personalities, motivations, values, and temperaments, thereby allowing groups to think smarter, be more creative, make better and quicker decisions, and ultimately drive higher levels of commitment and engagement.
Given the comfort most people have in defaulting to familiarity in their professional and personal relationships, groups have to make concerted efforts to seek, nurture, and champion diversity. To those groups that make the effort, as the old saying goes: "to the victors go the spoils."
Almost all progress in life can be attributed to the work of groups and the healthy dynamics that were at play. This is true of thriving family structures, organizations, neighborhoods and communities, and even governing bodies. If more communities and organizations could take the time to understand its members, the entirety of these groups would benefit from stronger connections, higher productivity, and a reaffirmed sense of purpose and fulfillment.
CarnegieChem® has now given you the tools and insight necessary to welcome and leverage those differences, whether subtle or quite pronounced, that make each person unique and collectively strengthens each group. Equipped with an understanding of your archetypal self, true alignment through actions and motivators, newfound empathy and compassion for other personalities, knowledge of Modes of Connection and attractants, and the powers of convergence and divergence within group dynamics, you are now ready to engage in those transformative undertakings that can prove to be so vital to personal, organizational, and societal progress and growth.
Certify:
Expense Approval
Manager Guide

Expense Report Journey
Employee Submits
No Client Bill Back Expenses
Manager Approves
Division Leader Approves
Division Operations Approval
Client Bill Back Expenses
Division Operations Approval*

Payment

Expenses are reimbursed every other Friday (same day as payroll). Employees must submit by end of day Friday prior to payment for managers, division leads, and division operations to approve for final submission by EOD Tuesday of pay week.

*All approvals by Lisa (RMSC), Diane (Slate), Jess (Web)

Approval Process: Non-client/bill back expenses

Approval 1:

Manager Review

Approval 2:

Division Lead

Final review for receipt acceptance, coding accuracy, and general policy respect.

CollegeXpress:	Kris
Digital:	Kris
RMSC:	Lisa
Slate:	Diane
Web:	Jess
CLARUS:	Kris
CS/BD/Mktg:	Taylor
Administration:	Kris

General approval of overall expense. Is this within the expected role and budget.

Review of policy expectations (ie. over spending, etc.)

Oversight of correct expense coding and classification.

Receipts are present for all expenses

Approval 3:

Division Ops

Overall P/L review and awareness.

Finance:	Ryan
Ops/HR/IT:	Meghan D.
CollegeXpress:	Megan G.
Digital:	Alexa
RMSC:	Vigg
Slate:	Megan R.
Web:	Bill

CLARUS: Kathi
Client Success: Eric
Bus.Dev/Mktg: Mark
Final approval by finance and submission for payment.
These should be updated to relevant resources - if you want to mention them. Otherwise you can delete this slide or use the format for contact information - names, emails, social and CarnegieHigherEd.com

Log Into Certify
Click on Approval Requests
Select Report to Review/Approve

Review Expenses
Confirm Department
Review each expense:
Does information match category selected? ▲
Is the expense reasonable and within company guidelines? ▲
Are receipts missing? ▲
Generally scan for anything glaring/inaccurate.
If something needs to be corrected, select “Disapprove Request” and notify your team member why and ask them to resubmit.
If all looks good, click Approve All. Then click Submit for Reimbursement.

Expense Code Info
Travel
(non-client work)
Travel/Expenses
(client work)
There are 3 meal options based on the situation:
Meals-Self (just you)
Meals-Staff (you and co-workers)
Meals-Client/Potential Client (you and non-Carnegie staff such as a client or a prospective client)
None of these should be used when traveling for Client projects. Use the Client Expense: Meals.

All travel related expenses are lumped together by starting the name with “Travel:”. These

should be used when traveling for non-client work.
Travel: Airfare
Travel: Car Rental
Etc.

Meals
(non-client work)
For Client project travel, codes have changed from “COGS” to “Client Expense:” These should be used when on a trip based on a client work.
Client Expense: Airfare
Client Expense: Car Rental
Etc.

Business Forms
Client Expense: Mat/Supply
Computer Supplies
Meals-Self
Postage
Travel: Car Rental
Business Gifts/Entertainment
Client Expense: Meals
Conv/Trade Show
Meals-Staff Only
Seminar/Classes
Travel: Gas
Client Expense: Airfare
Client Expense: Mileage
Copy Expense
Membership Dues
Shipping/Overnight
Travel: Ground Transport (Uber, Taxi)
Client Expense: Car Rental
Client Expense: Parking
Employee Relations
Miscellaneous
Subscriptions
Travel: Lodging
Client Expense: Gas

Client Expense: Printing
Internet
Office Equipment
TeamCare
Travel: Mileage
Client Expense: Ground Transport (Uber, Taxi)
Client Expense: Travel Other
Marketing
Office Supplies
Tips
Travel: Other
Client Expense: Lodging
Computer Software
Meals-Client/Potential Client
Photography
Travel: Airfare
Travel: Parking
Travel: Tolls
Expense Code List
*List may update form time-to-time. If you are unsure, ask your ops admin. If you find nothing fits, let your ops admin know and we will review for addition consideration.

These should be updated to relevant resources - if you want to mention them. Otherwise you can delete this slide or use the format for contact information - names, emails, social and CarnegieHigherEd.com

Resources
Kris Peterson:
kpeterson@carnegiehighered.com

Lisa Mathias:
lmathias@carnegiehighered.com

Diane McLaughlin:
dmclaughlin@carnegiehighered.com

Jess Howland:
jhowland@carnegiehighered.com

Taylor Mims:
tmims@carnegiehighered.com

Meghan Dalesandro:
mjd@carnegiehighered.com

Contacts
These should be updated to relevant resources - if you want to mention them. Otherwise you can delete this slide or use the format for contact information - names, emails, social and CarnegieHigherEd.com

Thank You!
CarnegieHigherEd.com

Files.com
Carnegie's Secure File Transfer System

1

We'll be using files.com any time we're sending or receiving student data. This typically comes in two forms:
receiving lists from a client
lists moving internally (to/from Digital, Slate, or RMSC, including Data Tagging lists)
What about Google Drive?
We can no longer use Google Drive to send, receive, or store ANY student data! Similarly, no lists can be sent through Asana or email, and nobody should be downloading student lists onto their computers at any point. If you come across an old list in the Drive, please delete it!

Why do we need to use Files.com?
We're upgrading our data sharing & storage across the company.
This includes discontinuing the use of our materials site (FTP) as well as file transfer via

Google Drive.

2
When do we need to use Files.com?

Logging In
1
3

Logging In
Navigate to https://app.files.com/login
Enter “carnegie” as domain
Sign in with Microsoft Azure SSO
You’ll have to set up 2FA and get code from your phone

Files.com Drive
The IT team has installed the Drive for PC users; Mac users should reach out to Whitney or Kayla
Open the files.com app from your start menu or application folder
Sign into files.com account via web, as prompted by the app
Sign in with Microsoft Azure SSO
Enter 2FA code
Account will connect; files.com window opens and loads

Structure & Sharing
2
6

Creating Folders
Amanda Noiseux will be creating folders & adding internal team members - if you need a new one made, you can fill out this form
This is an AM/PM responsibility - each AM/PM will tell Amanda which other Carnegie team members need access (see slide 9)
Steps for creation (should be handled solely by Amanda):

Click into “Client Folders”
Select “New Folder”; name the folder the full school name (should match Tinman and Google Drive)
Within the client folder, create subfolder for each included division
Modeling & CLARUS each have their own main folder
Digital vendors (Simpli.fi and Semcasting) also have their own main folders, with client subfolders nested within

Sharing Internally
Permissions will be shared at the subfolder level to maintain security (for example, Digital Team members will have access only to a client’s Digital subfolder, etc.)
The only people with full access are Amanda Noiseux and the AM Leaders (Kayla Gaier, Brian Leininger, Selma Gomez, Amy Lintner, Chelsea Peterson, Whitney Yount) - if you need permissions added or changed for a Carnegie team member, let Amanda know
(For Amanda & AM Leaders only) To share, click on the folder and the people icon and add new permission - “full” for most internal team members; “full” and “share” for AMs/PMs

Access Information
What access will I have?
Each team member will have access ONLY to folders for clients that they actively work on—the goal is to keep access limited only to people who absolutely must access this data. Amanda Noiseux and the AM Leaders (see slide 8) have access to all folders as a back-up, so if you need something from a folder you don't have access to (for example, if you're covering for someone on PTO), you can slack them!
Who should have access to each client folder?
Only the Carnegie team members who absolutely need access to the data will be able to see it. Each time an AM or PM fills out the form to have Amanda create a new client folder, they’ll specify who needs access—for lists coming from a client, this will typically be the AM, PM, and relevant project team members (for digital, platform specialist and associate; for Slate, Slate Strategist; for RMSC, Research team member).

Client Sharing & Use
How do I share access with my clients?
Once Amanda has created your folder, you'll go to your client's divisional subfolder and click the link on the right-hand side. Make sure that you’ve selected “Download and Upload” in the dropdown if you want a client to be able to add lists! You'll then visit

https://1password.com/password-generator and generate a password—it should include both numbers and symbols. You'll paste it into the "Create a password" field and then click "generate share link" and type in your client's email address (feel free to add a custom message as needed). Once you click "send email," your client will get an email directly from files.com giving them access.
You'll then need to send your client contact a separate email with the same password in it in order to enable them to access the folder. This password can only be sent to ONE client contact, so make sure that the person you're giving access to is ready and on the lookout.

Client Sharing Example
This is an example of the email a client will receive from Files.com:
Once they log in using the password, they see:

Client Sharing & Use
How will I know when my client uploads a list?
Once a folder has been created, AMs/PMs are responsible for going into the folder and turning on email notifications to ensure that they know when a list is uploaded—see below for a visual!

FAQ & Resources
3
13

Frequently Asked Questions
When do we need to start using files.com?
Please start now! The goal is to be fully in files.com by January 1, but the sooner, the better.
Internal list sharing - use files.com starting now
Sharing lists with vendors (Semcasting, Simpli.fi) - use files.com starting now
New clients - use files.com from the beginning
Existing clients - start using files.com as soon as you're able, but no later than January 1
How do I avoid downloading lists if I need to make updates?
Files.com has a built-in editor that you can use! Click into the list and then select "Open in files.com editor" - the interface is similar to Excel, and it auto-saves your updates. You can use this feature to clean up lists, etc. without downloading them to your computer.
How do I move lists out of files.com without downloading?
There's a desktop version of files.com, similar to the one we use for Google Drive File Stream - see slide 5 for details. From there, you can click and drag to pull the lists into other

applications.

Frequently Asked Questions

Do we have language for explaining files.com to clients?

We do! This was drafted for Digital, so feel free to tweak to ensure it makes sense for your clients:

Hi Client,

We will be using the secure file sharing service files.com to handle the list sharing and exchanges in support of our campaigns: insert campaign names here.

Please be on the lookout for two emails:

You will receive one email from files.com with the link to our shared folder where you can plan to upload your lists.

You will receive a second email with your password to access the shared folder. For security reasons, the password is only shared with one contact upfront, but we can provide additional access links to other team members as needed.

Once your lists are uploaded, our team will receive an automatic notification anytime a new list is uploaded.

Thanks!

Do clients have access to all the files in the folder, or just the file I choose to share with them?

If you share a folder, clients will have access to all files in the folder that you share with them. There's a “new folder” button in the top right corner of your screen that you can use to create subfolders if needed!

Frequently Asked Questions

How do clients access their folder after their initial login?

Clients will need to use the original link that was sent to them (as well as the original password). If they lose it, no worries! You can go to “Sharing” in your left sidebar to see all of the share links that you've created. If you click into the original share link, you can re-send the email to the person you originally provided with access.

How do clients give access to other people on their team?

Unfortunately, clients aren't able to share the links that were sent to them with other people at their institution, but luckily, you're able to provide that shared access with additional team members. As mentioned above, go to the "Sharing" section on your left sidebar - it'll let you add additional team members to your original link by sending them an email as well.

More questions coming soon!

Resources

Files.com Overview (10/10)
Passcode: i+W=e6mf
Initial Training Guides:
Digital AM Training (8/8)
Slate AM Training (8/21)
Digital Team Training (8/14)

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!

Google Suite Guide
1
Collaborative Productivity

Carnegie's collection of cloud computing, productivity, and collaboration tools that hosts our professional email, shared calendars, and online document editing and storage.

2
contents
table of

Google Drive
1
3

4
Google Drive
File Storage
Google Drive is a cloud-based file storage system where we store all of our files. To access Google Drive you can use your internet browser, the mobile app, or File Stream.
+

5
File Access
Google Drive

The nine-circle grid that appears on all Google web pages is where you'll find access to all Google applications. To locate files, select the Google Drive icon.

You need to be connected to the internet in order to access this menu and the Google Drive.
Accessing Your Files
Via an Internet Browser
+
+
From the Google Drive homepage, you'll select "Shared Drives" from the left-side menu to access our company files.
+

Google Drive File Stream is a desktop application that allows you to access and work directly on files within your Google Drive right from your computer's file browser.
Accessing Your Files
FILE STREAM ON WINDOWS
FILE STREAM ON MACS
+
Advantages
Searching by File Stream has proven to be much easier and faster than Google Drive.
You are able to access files even if you don't have internet connection currently—once you

regain connection, your file stream will sync and make your updates in Drive.
It is much easier to move files/folders within Drive by dragging and dropping them with File Stream.
You can also pin folders to your quick access section that you use all the time in File Stream!

+
Disadvantage
You cannot create new Google files from within File Stream—you will need to go to the browser to do so. However, you can navigate in File Stream to the folder in which you want to create the new file and then right-click and open the folder you want in your browser.
Via Google File Stream (Recommended)

Searching the Google Drive can be a bit overwhelming, particularly if you don't know the name of the file you're looking for.
Finding Your Files
RESULTS WITHOUT ENTER
RESULTS WITH ENTER
+
Pro Tips
Below are a few pro tips to make your searching easier:
After entering your search criteria in the search field, hit enter to see where the files live (in which Drives) instead of trying to judge which file to click on by just seeing the name of the file.
Searching by Filestream has proven to be much easier and faster than Google Drive.
Google Drive Search

9
File Organization
Google Drive

Shared Drives
My Drive
vs
Your My Drive is storage space for any personal files you have or drafts of documents you're working on before they're ready to be seen by others.

This space should not be used frequently.

Our default is to save all documents created within a Shared Drive to ensure effective collaboration and organization within our digital workspace.

Any PII (Personal Identification Information) should not be stored in Google Drive but rather, in Files.com.

Shared Drives to Use
You'll find most—if not all—of the files you're looking for in one of two Shared Drives:
Client Folders Drives
CD - Resources Drive

Client Drives
All "University of" folders do not live within the "Client Folders - T-Z" drive but rather, within the client drive that contains the first letter of the word after "University of". For example, University of Austin lives in the "Client Folders - A" drive.
Our client files are stored within a series of shared drives, labeled "Client Folders." In order to stay well within our drive storage space, the folders are broken out alphabetically. Within each Client Drive, there are individual client folders, which each have additional sub-folders for further organization by division.
Drives
Client Folders
Sub-Folders
File sharing with clients should be facilitated solely by those on the account management team. Client-facing documents should all be saved in the "Client Resources" sub-folder within each client folder.
+
+
>
>

13
CD - Resources Drive
The CD-Resources drive contains team-specific resource folders as well as company-wide resource folders.
All team-specific resource folders are labeled with the team name, beginning with an underscore. These are self-managed and maintained by each division/team.
All company-wide resource folders contain "(ALL)" in the folder name.

Business Development (ALL)
proposal templates and file assets
Google Drive Templates (ALL)
all original template files for those saved in our template galleries
Internal Initiatives (ALL)
collaborative documents for teams working on cross-company initiatives
Marketing (ALL)
logo files, brand elements, staff images
Operations + Human Resources (ALL)
software resource guides, professional development, training videos, benefits, payroll, job descriptions + career pathing, DEI, travel + reimbursement, all-company meeting, mentorship program

14
"Junk Drawer" Folders
Most of us have that one drawer in our kitchens or desks where all the miscellaneous stuff gets collected. In an effort to keep our shared folders clear of miscellaneous clutter and accidentally-saved files, we've created "junk drawer" folders.
All one-off files that get saved errantly alongside top-level client or resource folders will get automatically sorted into a "z_Junk Drawer" folder if they are not moved within 30 days of being created.
If you create a file and can't find where you saved it, check a junk drawer folder.

15
Personal Workspace
Create your own personal workspace to group together frequently used documents for easy reference.
To set up a personal workspace, click Workspaces on the left navigation bar and then "create workspaces".
You can hide or remove workspaces when they are no longer needed or when you want to make room for new workspaces.

16
File Creation
Google Drive

Best Practices
Create new files within the folder you want them to live in

Navigate to the drive and folder where the new file should live and click +New. Scroll to the file type you want and either select from a blank doc or from a template.

Please do not save files in your My Drive!
If you're unsure where you can save a working file on one of our Shared Drives, please ask your manager or the Ops team (ops@carnegiehighered.com).

Does a template exist?
When you're creating a new file, ask yourself whether a template for that file already exists. If it does not, ask yourself whether one should exist. See this slide for more instructions on how to use our template galleries.
+
+
+

Naming Conventions
Client Deliverable Folders
[Tinman Order #] _ [Client Code] _ [Deliverable Name]

Client Deliverable 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

Examples:
56278_UMISS_Yield Brochure
56278_UMISS_Yield Brochure_R1_V1
56278_UMISS_Yield Brochure_R1_V2
56278_UMISS_Yield Brochure_R1_CR
56278_UMISS_Yield Brochure_R2_V1
56278_UMISS_Yield Digital Ad-5x7_R1_V1 (Postcard)
54369_CBROU_Campaign Concept

51634_COLCOL_Strategic Deliverable

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
OHNORTH_SOW4_business_digital_092122_#53075
OHNORTH_SOW5_pharmacy_digital_093022_#53119
OHNORTH_IO58756_slate_041223

Google Template Gallery
Click “New” in Drive
Select the type of document and choose “From a template”
Use the Category dropdown to jump to the desired section
1
2
3
The Drive Template Gallery allows you to upload frequently used files and save them as a template for future use. Microsoft office files must be converted to a Google file before being added to the gallery.
Creating a File from a Template

Google Template Gallery
Business Development
Client Success
CollegeXpress
Creative: DXD
Creative: Photo/Video
Creative: Signature
When submitting a new template to the gallery, use one of the below categories although you will see more options to choose from. If you feel you need to make a new category, reach out to Ops prior to doing so. Files used in the gallery should live in the CD-Resources drive and should only be uploaded to the Template Gallery if they are used by multiple people. Microsoft files must be converted to Google files before being added.

DOCS CATEGORIES
Business Development
CollegeXpress
Creative: DXD
Creative: Photo/Video
Creative: Signature
SHEETS CATEGORIES
_Marketing
Business Development
Carnegie Standard Templates
Click-Send Proposals
Client Success
CollegeXpress
SLIDES CATEGORIES
Choose Submit Template.
Choose a document within the Drive and add to one of the categories listed below.
1
2
Select the type of document and choose “From a template”.
3
Submitting a New Template
Digital
Marketing
Research + Strategy
Slate Optimization
Web
Digital
Research + Strategy
Slate Optimization
Web
Digital
RMSC
RMSC: Modeling
Signature Creative
Slate Optimization
Web

Tips + Tricks

Check the version history
Version history can show you all the past versions of a document. You can restore on of those previous versions if needed.

Download to your device
You can download any Google file to your device, which will convert it to a Microsoft file.

Save as Google file
If you have uploaded a Microsoft file to Google Drive, when you open the file and click 'File' in the toolbar you will see the option to 'Save as [file type]'. You should choose this option any time you plan to edit your file within Google to avoid formatting issues.

Share with others
Choosing 'Restricted' will allow access only to the email addresses you specify.
Choosing 'Carnegie Dartlet' will allow access to anyone within our organization.
Choosing 'Anyone with the link' will allow access to anyone in or outside of our organization.

Choose the level of access you want to allow once you have chosen who to share with.
+
+
+
+

Gmail
2
22

Gmail Labels
Labels are Gmail's way of categorizing and organizing emails. They function somewhat like folders but offer more flexibility since you can apply multiple labels to a single email.
To create a label, click on "More" in the left sidebar and then choose "Create new label." Give it a name and click "Create."
To apply a label to an email, open the email and click the "Labels" icon (it looks like a tag) at the top of the email. You can select one or more labels to apply.
You can apply a color to a label - and the email's that are included in that label will have the label at the top of the email
1

2
3

Gmail Automation
Gmail provides automation through filters and rules, allowing you to automatically apply labels, move emails to folders (labels), or perform other actions.
Filters can be a powerful way to automatically organize and prioritize your emails. For example, you can set up filters to label all emails from a specific client, automatically archive newsletters, or mark emails with specific keywords.
To create a filter, click the filter button in the Gmail search bar. You can specify filter criteria, such as sender, subject, keywords, and more.
After defining filter criteria, you can choose what action to take, like applying a label, archiving, marking as important, or categorizing.

Google Calendar
3
25

Calendar Settings
In our ongoing effort to promote transparency and facilitate efficient meeting scheduling at Carnegie, we ask you to make your calendar events visible to all team members.
To enable this feature please follow these steps:
Open Google Calendar
Click the three dots located next to your name (screenshot 1).
Ensure you've selected 'make available for Carnegie Dartlet' - see all event details (screenshot 2).

However, we understand that certain events may be of a sensitive or personal nature. In such cases, you can easily mark them as private by following these steps:
Click into the event you wish to make private.
Change the default visibility to 'private' (as depicted in screenshot 3)
Creating Shared Visibility
1
2
3

27

Travel Calendars
Add your team-specific Travel calendar to your calendar list in Google in order to enter days that you will be away from your desk, traveling for work purposes. Select from the calendar list below - if you are unsure of which calendar to add, ask your supervisor.
Bus Dev & Marketing
Central Admin
Client Success
Creative
RMS
Slate Optimization
Student Search
Web
CLARUS

+
PTO Calendars
Add your team-specific PTO calendar to your calendar list in Google in order to see everyone on your team's planned time off. Select from the calendar list below - if you are unsure of which calendar to add, ask your supervisor.
Central Admin
Bus Dev + Marketing
Client Success
CollegeXpress
Creative
Digital
RMS
Slate Optimization
Student Search
Web Team
CLARUS
+
Training & Events Calendar
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, Activities Committee, or Operations division will appear on that calendar.
+
Shared Calendars
Working in a virtual environment means we rely on Zoom meetings to connect with our

team, our supervisor, or our clients. In order to schedule these meetings based on availability, it is important to keep your calendar up to date and viewable to others. It is also important to make sure you have access to the appropriate company calendars in order to view PTO, Travel, and upcoming Trainings and Events.

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Organization Through Color

Google calendar allows you to use color labels (also known as event colors) , to help you visually categorize and organize your events. Assign different colors to various types of events (internal meetings, client meetings etc) to visually differentiate at a glance.

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Scheduling a Meeting

Scheduling a meeting with many team members can be overwhelming! Instead of manually looking at the calendars to see what works for each person, use the “suggested time” feature to show next available days/times that everyone can attend after you’ve created the event and added participants. We also recommend downloading the Zoom extension for Google Calendar to automatically add your zoom info.

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Setting Working Hours

Setting your work hours lets others know when you’re available for a meeting. To set your standard work hours click the gear icon in the upper right corner. Then ,from within Settings, click on ‘working hours & location’ to select the working hours for each day (and location if you’d like).

Access Your Settings

Initiate the process by clicking on the gear icon, located in the upper right corner of your platform. This pivotal step opens the gateway to configure your work hours.

Navigate to “Working Hours & Location”

Within the Settings menu, select 'Working Hours & Location.' Here, you will have the opportunity to specify your work hours for each day, ensuring clarity and consistency.

Tailor Your Work Hours
In this section, you can meticulously tailor your work hours to match your specific requirements. Customize your schedule based on each day's demands and designate your preferred location if necessary.

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Keyboard Shortcuts

Navigation
Navigate to Today: Press "t"
Navigate to Date: Press "d" and then enter the desired date in the format "YYYY-MM-DD"
View Switching
Day View: Press "1"
Week View: Press "2"
Month View: Press "3"
Agenda View: Press "4"
Event Creation
Create Event: Press "c"
Quick Add Event: Press "q"
Event Editing
Edit Event: Press "Enter" while the event is selected
Navigation Within Event Details
Next Field: Press "Tab"
Previous Field: Press "Shift" + "Tab"

Google Files Types
32
4

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Google Docs
Google Files Types

Google Docs
Google Docs is a web-based word processor that allows you to create, edit, and collaborate on documents.

Key Features

Cloud-based storage so you can access documents without needing physical file storage.

A comprehensive set of text formatting tools, such as fonts, styles, bullet points, and more. You can insert images, links, and tables, and the document autosaves frequently to prevent data loss.

A detailed version history of your document, allowing you to review and revert to previous versions. This feature is particularly useful when you need to track changes or restore a previous state of the document.

Share documents with specific individuals or groups by providing them with view or edit permissions. You can control who can see, comment on, or make changes to your document, making it easy to collaborate securely.

Creating a New Google Doc
From an existing Google Doc
Navigate to File - new and you can create a new google doc, or one from a template.
From a folder within Google Drive
Navigate to the drive and folder where the new file should live and click +New. Scroll to Google Docs and either select from a blank doc or from a template.
From within Google Drive
Open Google Docs from your Google workspace and create a new blank doc or one from the template gallery
1
2
3

36
Google Sheets
Google Files Types

Google Sheets
Google Sheets is a web-based spreadsheet application developed by Google as part of the Google Workspace. It provides users with the ability to create, edit and collaborate on spreadsheets online. Google Sheets is similar in functionality to Microsoft Excel but offers the advantage of cloud-based access and real-time collaboration features.
Many of the basic features and functions needed for most tasks but may lack some of the advanced capabilities found in Excel
Accessed using web browser or the mobile app
Version history built in so you can see who made the latest changes
Allows for seamless collaboration - allowing team members to work on the same sheet in real-time

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Creating a new Google Sheet
From an existing Google Sheet
Navigate to file - new and you can create a new google sheet, or one from a template.

From a folder within Google Drive
Navigate to the drive and folder where the new file should live and click +New. Scroll to Google sheets and either select from a blank spreadsheet or from a template.
From within Google Sheets
Open Google Sheets from your Google workspace and create a new blank spreadsheet or one from the template gallery

Google Sheet Tips
Send Emails when you comment
Google Sheets is great for collaborating with others – everything is updated in real time, but what if you need to let someone know there is something you need them to check? You can actually send an email to let them know when you're adding a comment to Google Sheets. Just add a plus sign (+) and then type their email address (or name) and then when you add your comment they'll receive an email with your message automatically.

Keyboard shortcuts
To see keyboard shortcuts, or to create your own, click "Ctrl /" on windows or "Command /" on a Mac

Google Sheet Filter Views
Google Sheets has a Filter view function where you can apply certain conditions to filter out

inapplicable rows that don't meet the condition. The advantage being the filter view only appears to the user while in that view. To create a new filter view go to data -> Filter views-> create new filter view. You can then name your filter view and it will be saved as an option to return to later.

Converting Excel to Google Sheets
File Import

Upload - browse (select excel file) - open

Import Data

If you have an Excel file that you'd like to convert to Google Sheets for collaboration, sharing or other purposes, it's super easy to do. From within Google Sheets navigate to File -< Import, select your excel file, and click import data, and you're done. You can now use the file in Google Sheets.

Google Sheets to Excel
If you have a Google Sheet you'd like to export to Excel (or another format), it is very easy to do so. Within the Google Sheet you can download to different file types, Excel, CSV, PDF etc. To do this go to File -> Download and select preferred file type.

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Google Slides
Google Files Types

Google Slides
Google Slides is an online presentation app that lets you create and format presentations and work with other people. While all Carnegie employees also have access to Microsoft PowerPoint, Google Slides is the preferred presentation tool when collaborating on a presentation with others.
Create a Presentation
To create a new presentation:
Navigate to the folder within Google Drive in which you want to create/save the presentation (you'll need to do this from a browser).
Select the "+ New" button in the upper left corner and then hover your cursor over the

arrow to the right of “Google Slides” to reveal a submenu.
From that menu, select “From a Template” to bring you to the Google Slides Template Gallery
If you don’t have a specific template in mind, always default to using the “Carnegie Template” found in the Carnegie Standard Templates section.
Edit + Format a Presentation
You can add, edit or format text, images, or videos in a presentation:
Insert and arrange text, shapes, and lines
Add, delete, and organize slides
Share + work with others
You can share file and folders with people and choose whether they can, view, edit, or comment on them.

If someone else shares a file with you to solicit your feedback, please provide your thoughts and suggestions by highlighting text and right clicking to add a comment.
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Google Forms
Google Files Types

Google Forms
Easily create and share online forms and surveys, and analyze responses in real-time.
Choose from a variety of question types to fit your needs.
Edit colors and themes by clicking the art palette icon in the upper right corner.
As with other Google file types, you can grant permission to collaborators so they can edit the form and its settings as well as view reponses.
The eye icon in the upper right corner lets you preview your form. When you are ready, click Send to email recipients or share your form link to allow others to complete your form
Results can be viewed in the Responses section, or you may follow the link to view in Sheets. This Sheet is automatically updated in real time as results come in.

carnegiehighered.com
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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!

Harvest Resource Guide
Time Tracking

1
Carnegie’s time tracking software, allowing us to collect data that informs workload, hiring needs, and product pricing.

The Big Picture
1
2

3
Why do we track time?
Tracking our time provides us with data that drives decision-making at all levels of the company.
What does this data enable us to do?
Support Healthy Workloads: provides managers with an accurate understanding of how balanced or off-balanced someone’s workload might be—and the ability to flag that through reporting and support our team in resolving it.
Plan for Resources: ensures we have enough resources on our teams to deliver the work now and in the future.
Price our Work: equips us to know whether we are accurately pricing the work, using insights of recorded hours from prior projects for future alike projects.

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How many hours should I have logged at the end of the week?
Full-time employees are expected to work 40 hours each week, however, you may not have exactly 40 hours logged in Harvest. You should have a reasonable number of hours logged each week and a per-week average of about 40 hours when you look at your month. Do your best to employ strategies that will ensure accurate time reporting.

PLEASE KEEP IN MIND
We seek honest, accurate time reporting to help us grow, determine what we need as a company moving forward, and support you in your role. Please be accurate, truthful, and diligent, tracking your hours as real-time as possible

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Week 1: 26.45 hours

Week 2: 35.00 hours

Week 3: 41.00 hours

Week 4: 34.00 hours

AVG PER WEEK: 34.11 HOURS

Week 1: 38.00 hours

Week 2: 39.80 hours

Week 3: 40.60 hours

Week 4: 39.25 hours

AVG PER WEEK: 39.41 HOURS

Scenario 1

Scenario 2

Scenario 3

✓

X

The hours logged on Weeks 1, 2, and 4 are not reasonably complete and the per-week average over the course of the month is also not close to
40 hrs/week.

Great!

Any one of these weeks by themselves might be fine, but 37 hrs/week should not occur as a trend. The per-week average at the end of the month is not close enough to 40 hrs/week.

Week 1: 37.15 hours

Week 2: 37.00 hours

Week 3: 37.00 hours

Week 4: 37.50 hours

AVG PER WEEK: 37.16 HOURS

Week 1: 22.00 hours

Week 2: 42.80 hours

Week 3: 56.70 hours

Week 4: 34.25 hours

AVG PER WEEK: 38.94 HOURS

Scenario 4

X

X

While the per-week average at the end of the month is close to 40 hours, the hours logged on Weeks 1 and 4 are not reasonably complete. Additionally, while complete and submissible, the hours logged on Week 3 are concerning.

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How many hours should be billable
each week?

Each role at Carnegie that tracks time has an associated billable percentage goal. There are five goal categories:

75% billable (30/40 hours per week)
60% billable (24/40 hours per week)
35% billable (14/40 hours per week)
15% billable (6/40 hours per week)
0% billable

These goals are meant to create alignment and eliminate confusion. Our time tracking data and the billable/non-billable splits help us learn and grow, but accuracy and completeness is always the number one goal.

PLEASE KEEP IN MIND

These are guardrails that should help you determine how to prioritize your time, identify when to elevate a concern, help your manager best support you, and serve as a discussion point as roles change and evolve. These are NOT intended to intimidate, drive inaccurate data submission, cause you to work more hours in a week, or be absolute.

See the billable goal per role here.

Submission Process

EVERY FRIDAY

All timesheets are due by end-of-day

You must submit your completed Harvest timesheet before you log off for the weekend. If you take PTO on a Friday, be sure to submit your timesheet before you go on PTO.

EVERY MONDAY

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12pm EST

Email is sent by Operations team to any employees who have not submitted their Harvest timesheet

2pm EST

Any missing time is entered by employee
Email is sent to any employees with Harvest timesheets that are still unsubmitted
4pm EST
All submitted Harvest timesheets are mass approved by Operations team

Getting Started
2
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You will receive an email invitation from the email address notifications@harvestapp.com to join the Carnegie workspace. Please accept the invitation (click the button in the email invitation) and choose to "Sign in with Google" on the following screen. Select your Carnegie Gmail account and follow the prompts.

SIGN IN
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Jane
Allerton
jallerton@carnegiehighered.com

Your profile can be accessed via the drop-down under your name located at the upper right of your Harvest menu. Here you may upload a personal photo and select your timezone. If you're worried about remembering to enter your time, make sure you check the box next to "Help me track my time with daily personal reminders."

Your notifications can also be accessed via the drop-down under your name. Please go to your notifications settings and uncheck all the boxes in the "Approval" section. If those boxes remain checked, you'll receive an email notification every time someone at the company submits their timesheet.

UPDATE YOUR PROFILE + NOTIFICATIONS
TIME
If you want to track your time in a browser, this is where you'll do so. Make sure you select today's date and select the green button with the white plus sign that says "New Entry." At the end of a week, this is also where you'll submit your week's time for approval.
PROJECTS
This is a list of the client projects to which you've been added. All employees should be

automatically added to all projects. If you don't see a project on your list to which you'd like to add time, please contact the Account Manager assigned to that project.

ORIENTING YOURSELF TO THE SPACE

If you prefer not to work from a browser, you can also download a desktop app and/or a mobile app.

To download the desktop app, visit one of the following:

https://www.getharvest.com/apps/windows

https://www.getharvest.com/apps/mac

CHOOSE THE FORMAT THAT WORKS BEST FOR YOU

To download the mobile app, visit one of the following:

https://www.getharvest.com/apps/iphone

https://www.getharvest.com/apps/android

EASY ACCESS FROM THE MENU BAR

RIGHT-CLICK OR DOUBLE CLICK TO EDIT

CREATE NEW ENTRY

FAVORITE YOUR MOST REQUENTLY USED TASKS AND PROJECTS

TIME SUMMARY DATA

PRESS PLAY TO ADD MORE TIME TO AN EXISTING ENTRY

CLICK ON THE SETTINGS ICON TO ACCESS YOUR ACCOUNT AND PREFERENCES, AND ALSO TO DETACH THE WINDOW FROM YOUR DESKTOP MENU BAR. MOVE THE TIMESHEET BOX AROUND ANYWHERE ON YOUR DESKTOP.

SWIPE LEFT

OR RIGHT TO CHANGE WEEKS

HOLD DOWN ON THE TIME ENTRY TO START TIME, FAVORITE A TASK, OR DELETE

SWIPE LEFT OR RIGHT TO CHANGE DAYS

TIME SUMMARY DATA

PRESS PLAY TO ADD MORE TIME TO AN EXISTING ENTRY

CREATE NEW ENTRY; ACCESS YOUR FAVORITES AND CALENDAR MEETINGS FROM THE DAY

Tracking Your Time

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Regardless of where you access your time tracker (browser, desktop app, Asana/Slack integration, etc.), there are three pieces of information required each time you create a time entry:
Project — either start typing or click the arrow to reveal a drop-down list of active projects.
Task — select the task that aligns with your role. You should always select the same task, unless you've been given explicit permission to switch between tasks.
If your role is sales-focused, please see page 13.
(If you normally select "VP, Management" as your task, do not change tasks even if you are filling in for someone on your team.)
Time — you can use the timer feature to let the clock run while you work on something. Feel free to start and stop the timer as often as you need to throughout the day. If you'd prefer to enter your time at the end of each day rather than using a live timer, please round the time you invested in the client project to the nearest quarter-hour (15 minute increments).
TIME ENTRY
You'll also note an optional "Notes" section when you create a new time entry. These are indeed optional. Use them if it helps you keep track of what you've recorded throughout the day (it's easy to forget what time entry belongs to which activity).
More tips and tricks can be found here: https://support.getharvest.com/hc/en-us/articles/360048181892-How-to-Add-and-Edit-Time-Day-View-
13

14
14
For the most part, Harvest projects are created for each contract/product and most teams track their time to these projects.
TIME ENTRY
There are four teams, however, that track billable time at the Client-level only: Client Success, Digital Strategy, Slate Communications, and CLARUS. These teams should find the appropriate client and then select the relevant project from the list below:

CS - Client Management
(for use by AMs, PMs, and CSLs only)
SO - Slate Communications Strategy
(for use by Slate Comms team only
Digital - Digital Strategy

(for use by Digital Strategy team only)
CLARUS - Digital
CLARUS - Consulting
(for use by CLARUS only)

Note: Non-billable sales-focused time for active clients should be tracked to the client-specific
INT - Sales - Future Scope project
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If you are on the Business Development team or Client Success team or are otherwise in Executive Leadership in a sales-first role, you'll need to sort your client-focused work into three buckets (see below). All work that is not client-focused should be sorted into the other non-billable Carnegie projects (see pages 21-22).
For non-active clients:
Please log all time spent selling or contributing to marketing efforts to the non-billable "INT - Marketing and Sales" project with Carnegie listed as the client. Your task will be "Client Success Management (sales)."
For active clients: you'll need to decide whether your time has been spent on billable or non-billable efforts:
Billable time: please log time to the billable product-specific project connected to that specific client.
Non-billable time: please log time to the non-billable "Sales - Future Scope" project connected to that specific client.
FOR SALES-FOCUSED STAFF
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To differentiate between whether your time was billable or non-billable for an active client, ask yourself the following questions:
Was I helping to deliver a product that is currently in scope?
If yes = Billable, If no = Non-billable
Was I helping to clarify scope or hold the line on scope creep?
If yes = Billable, If no = Non-billable
Was I talking through strategy for how to build consensus or create buy-in on campus for the work we are currently scoped
to deliver?
If yes = Billable, If no = Non-billable
Was I discussing an amendment to the current contract that would have us swapping current scope for different scope?

If yes = Billable, If no = Non-billable
Was I talking through additional products/services we can provide that are not currently in scope?
If yes = Non-billable, If no = Billable
Was I simply investing time in creating trust or furthering the relationship?
If yes = Non-billable, If no = Billable
See FAQ page 25 for more information about active vs. non-active clients.
BILLABLE VS. NON-BILLABLE ON ACTIVE CLIENTS

If you are on the CollegeXpress team, you'll need to sort your time into Billable and Non-billable projects like everyone else, however, you'll have a few additional Non-billable project options—those listed with CollegeXpress as the client .
For Billable work:
Please log all time spent working on a client-related task to the CX project(s) associated with that particular client. At this time, there are five project types:
CX - CX Connect
CX - Custom Response Services
CX - Premier Placement
CX - Subscription (# profiles)
CX - Rising Senior Campaign
FOR COLLEGEXPRESS STAFF

Non-billable work:
In addition to the ten non-billable categories (under client "Carnegie") listed on pages 21-22 of this guide, you'll also log time to the following (under client "CollegeXpress"):
[00000] INT - Affiliates/Partnerships: For all work on CollegeXpress affiliate marketing and partnerships, please log time to this project.
[00000] INT - Email Marketing: For email marketing work directed towards students, parents, and counselors, please log time to this project.
Note: if you are emailing Carnegie clients to sell CX products, please log time to the non-billable "INT - Marketing and Sales" project or the client-specific "Sales - Future Scope" project.
[00000] INT - Website: All time spent updating collegexpress.com should be logged to this project.
[00000] INT - Product Development - [insert product here]: As you embark on product development work for any current or future products, a new project will be created for that initiative.

Integrations
4
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Asana has removed the direct integration with Harvest. However, they do still support the Google Chrome Extension that works within the Asana Browser.

Harvest: Browser Extension for tracking time in Asana

ASANA
If you select the timer icon from within your Asana task, the Project/Task will auto-populate based on the label of the task in Asana. Please edit as necessary so that your time entries match our naming conventions established for Harvest.

Pro Tip: Do not forget to stop the timer once you've started it from Asana. The time entry box may disappear after you've started your time so you may not see a visual reminder that will prompt you to stop the time.
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By signing into Harvest with Gmail, using your Carnegie email address, you've also created a connection between your work calendar and your timesheet.
In the desktop app, you'll see a prompt to "Show Calendar" after you click the green "New Entry" button in the "Time' section. If you click on the prompt, all of your meetings from the day will appear. Simply select one of your meetings and your new time entry will change to reflect the length of the meeting as well as the title of the meeting in your "Notes" section. Finish the entry by selecting the appropriate Project and Task from the drop-down menus and choose "Save Entry."
GOOGLE CALENDAR
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If you'd like to turn on the Google Chrome extension, begin by navigating to https://www.getharvest.com/integrations/chrome

By installing the extension, you'll see a Harvest icon appear in the Chrome toolbar. (If it does not show up right away, look at your list of Chrome extensions and ensure Harvest is listed as "pinned"). Simply click on the Harvest icon in the Chrome toolbar to start or stop a timer. There's no need to leave the tab you're currently on.
The icon will be greyed out initially and will turn orange each time you have a timer running.
GOOGLE CHROME EXTENSION
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By connecting Slack and Harvest, you'll have the ability to start and stop a timer without leaving Slack:
/harvest start [notes] Use this command to start a new timer. Upon entering the command, you'll be prompted to select a Project and a Task for the entry.
/harvest stop Use this command to stop a timer.
/harvest log [hours] [notes] Use this command to log hours without starting or stopping a timer. upon entering the command you'll be prompted to select a Project and Task for the entry.
SLACK
21

Non-Billable Buckets
5
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Listed under the client "Carnegie," you'll find ten non-billable projects. Please use these buckets when you are spending time that is not client focused. Below are appropriate use cases:

[00000] OOO - PTO (company holiday, bereavement, jury duty): anytime you request a PTO day (half or full), please add the hours you took off to this project.
[00000] INT - Carnegie Bench (awaiting new project): if you ever find yourself with nothing to do and have already asked your supervisor for a project to work on, please add time spent waiting for an assignment to this project.
[00000] INT - Employee Engagement Activities (trivia, lobsterfest fun): as you participate in trivia competitions, lobsterfest week activities, team celebrations, holiday celebrations, or other formally organized fun activities, please add your time to this project.
[00000] INT - General Company Admin (timesheets, Harvest, submit PTO, expense reports, etc.): all time spent doing general administrative work, such as filling out employment paperwork, submitting your Insperity timesheet, requesting PTO, organizing and submitting

expense reports, entering/submitting your time in Harvest, reviewing the handbook or travel policy, or troubleshooting computer issues with Help Desk, please add your time to this project.

[00000] INT - Internal Meetings (non-client focused): all meetings conducted that are not focused on client work should be logged to this project—this includes all team huddles, 1:1 meetings with your supervisor, Wednesday all-company calls.

continued from previous page...

[00000] INT - Internal Projects (innovation, process dev, etc.): as you and your supervisor have agreed to your involvement with research and development for new products, process or template creation and revisions, or other ad hoc reporting, please add your time spent to this project.

[00000] INT - Management: time spent conducting 1:1s with direct reports, performance-based or evaluation conversations with direct reports, or figuring out workload balance or organizational strategy changes can all be logged to this project. Only those with direct reports should be adding time to this project.

[00000] INT - Marketing and Sales: as you're involved with new scope that is for a non-active client, be it conversations with clients, proposal development/review, contract development/review, as well as other marketing and sales activities such as webinars, conferences, writing blog posts, reviewing sales pipeline, or meeting with the marketing team, please log your time to this project. See the FAQ on page 25 for more information.

[00000] INT - Other Travel Time: actual travel time (time spent in an airplane, car, bus, or train; time spent walking, running, or biking to your destination) where you could not accomplish other work should be logged to this project.

[00000] INT - Team and Employee Development: all time spent interviewing, hiring, and onboarding new hires (including when you are the new hire!), as well as ongoing training and professional development opportunities, should be tracked to this project.

The Reasonableness Measure

Don't over-manage your time tracking. Accurate time-tracking to client projects and complete tracking of your full work week are more important than precise allocation between the non-billable buckets.

For any questions that cannot be resolved using a ‘reasonableness’ measure, please consult your manager.

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Frequently Asked Questions
6
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Accuracy in Collection: the most accurate way to collect billable time is to track both billable and non-billable time. When we need to account for all our time in a week, we create better time tracking habits and consistency strategies. It’s also easier to tell when a timesheet is incomplete before submitting.
Full Picture Reporting: we have limited ability to problem-solve and provide support without knowing how our non-billable time is being spent. For example, if too much time is being spent on internal meetings, we can actively work to reduce meeting lengths or frequencies. Additionally, value is derived from billable and non-billable work alike. Many roles have expectations around completing certain non-billable tasks.
Why do we track all our time—both billable and non-billable?
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Please comment in the #harvest-support Slack channel and someone from the Operations team will unlock your timesheet so that you can resubmit.
What if I accidentally submitted a timesheet or need to make a change on a submitted timesheet?
No. Your Harvest time is not related to your pay at all.
You will continue to complete the Insperity/Time Star timesheet as you have always done.
Does this replace my timesheet I submit every two weeks for payroll?

An active client is a client who has a live Tinman Order—one for whom we are actively completing work. Likewise, a non-active client is one who does not currently have a live Tinman Order or any work that Carnegie teams are currently working on.
This distinction is important for those who are involved with selling new scope. For all staff who contribute time to conversations, pitches, proposals, or contracts for new scope, time will need to be tracked to one of two locations:
For active clients: please log time to the non-billable “Sales - Future Scope” project connected to that specific client.

For non-active clients: please log time to the non-billable “INT - Marketing and Sales” project with Carnegie listed as the client.

What is the difference between an active client and non-active client? Why is this distinction important to Harvest time tracking?

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If your travel is for marketing or sales purposes, please log your actual travel time (time spent in an airplane, car, bus, or train; time spent walking, running, or biking to your destination) where you could not accomplish other work, to the “INT - Marketing and Sales” project.

If your travel is for billable client work, please confirm with your account manager whether your actual travel time should be logged to the client project or to the non-billable project called "INT - Other Travel Time."

If your travel is for an internal non-client-focused team gathering, please log your actual travel time to the non-billable project called "INT - Other Travel Time."

When working on a Carnegie projects while traveling from one destination to another (including time in the airport and on a plane), please create standard time entries for that work, rather than logging that time to travel. Be careful not to double count your time in these instances.

How do I track time while traveling?

You can edit any time entry, regardless of how you entered it. In a web browser, select the button with the pen icon to the right of the entry and then make your edits in the lightbox that appears. Click "Update Entry" when you're finished.

From the desktop app, right-click the time entry you want to remove and select "Edit Entry" from the drop-down menu that appears. You can also double click on a time entry, and you'll be automatically shown the "Edit Entry" pop-up box.

In the mobile app, tap the entry you want to edit, make your edits, and then select "Update" in the upper right corner.

What if I used the timer but I didn't start it right away or forgot to stop it?

When this occurs, create a new entry using your best judgment, rounding to the nearest 15-minute increment. Look at your calendar for clues as to how long you spent working on that project. Check your email, Slack, and Asana messages as well for timestamps that may indicate approximate start and end times for the time you spent. If you were working in a document, check the "Last opened" and "Modified" timestamps. If your work was primarily within a Google doc or sheet, check the history on the file to see when your first and last edits were made.

What if I forgot to track my time on a project?

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No, simply press the play button next to the first time entry and you'll continue to add more time to that task bucket. We only care about how much total time is allocated to each project, not how often and in how many time increments it was worked on.
If I start and stop working on the same task for the same project all day, do I have to create a new time entry every time I start/stop?
Make sure you are tracking time daily, not at the end of the week. Accuracy is key for this effort and timely input will keep us accurate. Just be intentional about creating time-tracking habits and our time reporting will be accurate!
How often should I be entering my time in Harvest?
If a time entry is listed on your Timesheet, you only need to press the play button next to the entry for that project and Harvest will prompt you to create a new instance of that entry in today's record.
If I am working on the same task for the same project I worked on yesterday, do I need to create a new entry for today?
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First, consider whether you can organize your day so that you can switch between tasks (or clients/projects) less often—even if that means you need to turn off Slack or Asana notifications until you complete everything related to that task/project. This might also influence how and when you sort through and respond to emails. Second, consider using a live timer and waiting to stop the timer until you've selected your next task to work on. Some time will inevitably be lost, but that time can be minimized.
I switch back and forth between tasks a lot. How do I best capture my time?

To delete an entry, select the button with the pen icon to the right of the entry in your web browser and then choose "X Delete" in the bottom right of the lightbox that appears.
From the desktop app, right-click the time entry you want to remove and select "Delete Entry" from the drop-down menu that appears.
In the mobile app, either tap on the entry you want to delete and choose "Delete Time Entry" at the bottom of the "Edit Time Entry" screen, or hold your finger down on the time entry you want to remove and select "Delete Entry" from the short menu that appears at the bottom of the screen.

How do I delete a time entry?
31

Do your part:
be accurate and on time
Enter and submit all hours you work by end-of-day Friday every week—this includes billable and non-billable time.
Good data in means good insightful data out.
Non-billable time provides us with the whole picture—without it, we have more questions!
Reminder:
32

Creating a New Project
7
For the Account Management Team
33

As soon as a contract is signed, please create the order in Tinman and then create a project in Harvest, using the same order number as the Tinman order. Be sure to archive any old project that is no longer active, especially during renewals.
In the "Projects" tab, click on the green button that says
"+ New Project." At the top of the "New Project" page, start by selecting an existing client (start typing or select from the drop-down menu). If your client is not already in Harvest, please add the new client (use the full name of the institution, without any acronyms or abbreviations).

CREATING A NEW PROJECT - BILLABLE
PROJECT CODE
The "Project Code" is the Tinman order number. Be sure to just enter the five-digit number and not to include a hashtag symbol at the front. There will be plenty of instances in which one order number is used across a dozen or more Harvest projects. You'll even see an alert from Harvest that the same project code is being used as another project. Please proceed anyway.

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PROJECT NAME
Please use the following naming conventions:

All
once for every Carnegie client:
CS - Client Management
Digital
for paid campaigns:
Digital - [Segment] - [Season/Year]
    Example: Digital - UG - 2021-2022
for data intelligence:
Digital - [Product/Service]
    Example: Digital - Google Analytics Consulting
for digital strategy team:
Digital - Digital Strategy
Slate Optimization
for all projects:
SO - [Product/Service]
for slate comms team:
SO - Slate Communications
CREATING A NEW PROJECT - BILLABLE

RMSC
for research and strategy projects:
RMSC - [Product/Service] - [Segment*]
    Example: RMSC - External Perception Study
    Example: RMSC - Marketing Ops & Comm Analysis - UG
for creative projects:
RMSC - [Product/Service] - [Medium*] - [Type*]
    Example: RMSC - Collateral Dev - Print - Value Piece
*For collateral development projects, please use "Collateral Dev" as the Product/Service and then the medium of collateral and then the kind of piece.
CollegeXpress
for all projects:
CX - [Product/Service]
CLARUS
for all digital marketing projects:
CLARUS - Digital
for all consulting projects:
CLARUS - Consulting

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Web

for web projects (SEO should follow this pattern, even if they come in on digital contract):

Web - [Project] - [product/service] or Web - [Project] - [Phase] - [product/service].

Example: Web - Austin Peay Web Enhancements - DEF - Wireframes

Example: Web - Coastal Carolina Redesign - DEF - SEO Strategy

DATES

Please add the start and end dates as you know them.

PROJECT TYPE

Please select “Fixed Fee.” From there, you’re going to add a budget.

For Digital, Web, Slate Optimization, and CX projects, please put the total Gross Profit for the project in the “Project fees” box. Then, select “Total project fees” from the drop-down in the “Budget” section. Finally choose “Person billable rate” from the ‘Billable rates” section.*

For RMSC projects, skip the “Project fees” section and select “Fees per task” in the “Budget” section. Then, choose “Person billable rate” from the ‘Billable rates” section.

For CLARUS and client-level billable projects for the Client Success, Digital Strategy, and Slate Communications teams, there is no need to add a project budget.

CREATING A NEW PROJECT - BILLABLE

TASKS

All standard tasks will be automatically added to each new project. All tasks should be marked as billable.

For Digital, Slate, Web, and CX projects, there is nothing more you need to do here.

For RMSC projects, you’ll enter the total budget per task for the particular project you’re working on. These budgets (or the process for calculating them) will be provided for you by divisional leadership.

TEAM

All employees will be automatically added to each new project and all will be marked as a manager of the project.

*Need help figuring out the Gross Profit for a project? Tinman can help! Please ask your supervisor where you can find this information in Tinman.

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All clients in Harvest will need to have one project for Account Manager (AM), Project Manager (PM), and Client Success Leader (CSL) time connected to this client.
As you are creating product-specific projects for this client, please look to see if a client management project has been established yet. If it has not, please create the project with the following details:
CREATING A NEW PROJECT - BILLABLE CLIENT-LEVEL

PROJECT NAME
The "Project Name" text box should have the following name exactly:
CS - Client Management
PROJECT CODE
Please leave this blank.
DATES
No need to add dates.
PROJECT TYPE
Please select “Time & Materials” and then “Person billable rate” from the first drop-down.
TASKS
All standard tasks will be automatically added to each new project.
TEAM
All employees will be automatically added to each new project.
37

Some clients in Harvest will need to have client-level projects for Digital Strategy or Slate Communications time connected to a client.
If you are creating Harvest projects for a contract that has a digital campaign or Slate communications work in scope, please create the project(s) with the following details:
CREATING A NEW PROJECT - BILLABLE CLIENT-LEVEL

PROJECT NAME
The "Project Name" text box should have the following name exactly:
Digital - Digital Strategy

SO - Slate Communications Strategy
PROJECT CODE
Please leave this blank.
DATES
No need to add dates.
PROJECT TYPE
Please select “Time & Materials” and then “Person billable rate” from the first drop-down.
TASKS
All standard tasks will be automatically added to each new project.
TEAM
All employees will be automatically added to each new project.

All clients in Harvest will need to have one project for work towards future scope connected to this client. This will primarily be used by sales-first team members, however, all staff who contribute to conversations around new scope as well as proposal and contract review should put their time to this project.
As you are creating product-specific projects for this client, please look to see if a future scope project has been established yet. If it has not, please create the project with the following details:
CREATING A NEW PROJECT - NON-BILLABLE CLIENT-SPECIFIC

PROJECT NAME
The "Project Name" text box should have the following name exactly:
Sales - Future Scope
PROJECT CODE
Please add five zeros to the project code box: 00000
DATES
No need to add dates.
PROJECT TYPE
Please select “Non-Billable” and don’t add a budget.
TASKS
All standard tasks will be automatically added to each new project.
TEAM
All employees will be automatically added to each new project.

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Insperity Resource Guide
1
Human Resources Management

Carnegie's technology and support for benefits, payroll, human resources administration, and training.

2
Insperity
What is Insperity and how will I engage with them?
Insperity is a Professional Employer Organization (PEO) that manages our benefits administration and payroll, and facilitates required training modules.
Your Insperity portal is your go-to hub for information about your paystub, benefit elections, documents such as the employee handbook, and training modules. The portal is also where you can update your personal information such as mailing address. You'll also use Insperity to submit timesheets and request PTO and, if you're a manager, to approve PTO requests.

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Timesheets
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WHAT
Insperity timesheets are a record of the hours worked and time off taken each week. They are generated automatically for full-time employees and are manually entered for part-time

employees. These timesheets are strictly for payroll purposes and are unrelated to Harvest time tracking.
+
WHY
Timesheets submit your payroll hours so you are paid appropriately. They also record the days that PTO is taken.
+
WHEN
You will be required to approve your Insperity timesheet on a bi-weekly basis. This must be done by 12:00 p.m. EST on the Monday prior to a Friday payday (these dates are noted on the Carnegie - Training & Events calendar).
+
WHERE
These timesheets are powered by Insperity software called TimeStar and housed in the Insperity Portal.
+
Timesheets

You will be required to approve your Insperity timesheet on a bi-weekly basis. This must be done by 12:00 p.m. EST on the Monday prior to a Friday payday.
6
Submitting Timesheets
Calendar Reminder
You can find a “submit your timesheet” reminder on the Carnegie - Training & Events calendar each Monday prior to payday. Duplicate the invite to your own calendar so that our human resources team does not have to track you down to submit.
+
Making Changes
After Submitting
Because we’re submitting timesheets for a two-week period before we’ve worked the entirety of those two weeks, there will inevitably be times where changes will need to be made after you’ve initially submitted your timesheet (you decide to take PTO last minute or have an unexpected sick day, etc.). In these instances, wait until Kris Peterson posts in the #general slack channel that timesheets have been unlocked (the Thursday prior to a pay day) and then go into your Timesheet to make the changes and resubmit.
+
Troubleshooting
For specific questions about submitting your timesheet, please reach out to your manager,

or Kris Peterson in Human Resources (kpeterson@carnegiehighered.com).
+

Search for ‘Insperity Mobile’ on the App or Google Play store.
Download to your phone and enter your login information.
Tap the three lines in the upper left corner.
Select ‘Timesheet’.
Review timesheet and select ‘Employee Approve’, or reach out to Kris Peterson for adjustments.
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Timesheets via Mobile App
Mobile App Approval (Recommended)
MENU
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You will be required to approve your timesheet on a bi-weekly basis. This must be done by 12:00 p.m. EST on the Monday prior to a Friday payday.
8
PAY PERIOD
DATE, NUMBER OF HOURS
WORKED, AND PAY TYPE
Timesheets via Desktop
Desktop Approval
Go to the Insperity Portal Login.
Enter your user name and password. Click ‘Time and Attendance from the left hand navigation.
Select ‘Total Hours’.
Review your timesheet and click ‘Employee Approve’.
NOTE: For specific questions about approving your timesheet, please reach out to your manager, or Kris Peterson in Human Resources.
PRO TIP: You can find a timesheet reminder on the Carnegie - Training & Events calendar each Monday prior to payday. Duplicate the invite to your own calendar.
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Requesting Time Off
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What should I know before taking time off?
10
Approval Process
Your manager will receive an email when you put in a request and will check the divisional calendar to make sure there is plenty of coverage for the dates you're requesting off. You will then receive an email when the request is approved or declined. Requests over 10 business days may require additional review by division leaders to confirm sufficient coverage.
+
Timing
Last minute requests happen, but try to make your time off request no later than two weeks prior.
+
How much is too much?
Talk to your manager! They will help you navigate the unlimited PTO plan and make sure you're taking the time you need without affecting your work.
+
For more information, please see the PTO Policy info sheet, and the company's handbook.
Taking Time Off

Taking Time Off
Mobile App (Recommended)
Tap the three horizontal lines in the upper left corner to reveal the menu.
Select 'Time Off' from the menu.
Tap the orange 'Request Time Off' button.
Select the orange circular button with a white '+' on it to add a date to the request.
Input the exact number of hours and choose the dates that you'd like to request those hours off.
From the 'Pay Type' dropdown list, choose the relevant reason for your time off.
Select 'Done' in the upper right corner.
Review dates, hours, pay type, and scheduling. Tap any values that you want to change.

Pay type may or may not say “Tracking [TYPE]”. If it is an option, choose that! If not, choose what is available to you.
Select ‘Submit’ in the upper right corner.
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MENU
PRO TIP: The mobile app allows you to multi-select dates instead of choosing each one individually.
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Taking Time Off
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.
Desktop App
From the left navigation menu, select ‘Time and Attendance’.
Select ‘Requests’.
Click the blue button that says “New Request.”
Select the blue circular button with a white “+” on it to add a date to the request.
Choose the correct date and the exact number of hours you’ll be taking off.
From the “Pay Type” dropdown list, choose the relevant reason for your time off.
Click the orange “Add Dates” button.
Repeat steps 4-7 for each day you’re requesting.
Review dates for accuracy and update the scheduling field for any partial day requests.
Click the orange “Submit Request” button.
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9

Canceling Time Off
If your PTO plans change, you will need to cancel your PTO request. Time off can only be

canceled through the desktop app. Don’t forget to update your personal calendar once the cancelation has been made.
13
From the left navigation menu, select ‘Time and Attendance’.
Under ‘Daily Procedures’ on the left, select ‘Requests.’
Scroll down to see all PTO requests and choose the one you want to cancel.
Select ’Cancel Request’.
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Organizational Chart
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INSPERITY ORGPLUS
Insperity contains the most updated organizational structure. Insperity OrgPlus allows all employees to have an accurate view of our company at any given time in lieu of a manually updated chart that can easily go out of date.
+
15
Organizational Chart

Organizational Planning
From the left navigation menu, select ‘Organizational Planning’.
The chart will appear and either show your own information or the results from the last chart you created.
16

Search Bar
The easiest way to navigate through the chart is to use the search bar to find one person. Start with that person and use the different features to expand your view.
17

Sub-Chart/Levels
Use sub-charts to display up to 4 reporting lines.
18

Reporting Line Dropdown
There is also an arrow to navigate upward to see someone's manager.
Ex. Started with just Ryan, then toggled sub-chart with two levels to expand to show Ryan's whole team.
This feature is helpful for creating views of a team or division. If you know one person on that team, you can use these arrows in addition to sub-charts to navigate to a larger view.
If someone is a people manager, there will be an arrow to navigate downward through their direct reports.
19

Branch Styles
Choose from several options of how you'd like the chart to be displayed.
Automatic view
Two-Column Tree view
Four-Column Tree view
20

Chain of Command
Using Chain of Command will show you the person you are searching for, then all levels directly above them.
Ex. Searched for Alexa and used the Chain of Command option to show All Levels above, so it shows her direct reporting line.
21

Tips + Tricks
If your view isn't appearing the way you want, be sure to check the features you have applied. Click Restore Default settings to start over.

If you want to clear your features, click the refresh button in the task bar.

The org chart pulls in your preferred name. If your preferred name does not show on your box, you can go into your profile settings in Insperity to change it.

If you have legally changed your last name, reach out to HR so they can work with you to update your last name. Changes cannot be made until you have an updated Social Security card.

If your reporting line looks incorrect, reach out to HR.
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+
22

Resources
4
23

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
From the left navigation menu, select 'Marketplace'.
2. You'll be redirected to a portal where you can browse through all the options.
24

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
From the left navigation menu, select 'Benefits'.
2. On the right, select
'Employee Assistance
Program (EAP).
3. You'll be redirected to a page where you can review more
information steps to get started.
25

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)
From the left navigation menu, select ‘Benefits’.
2. On the right, select
   ‘Educational Assistance’.
3. You’ll be redirected to a page where you can review more
   information.

Community Online Academy
Community Online Academy provides live and pre-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.

From the left navigation menu, select ‘Marketplace’.
2. Select the ‘COA Community Online Academy’ tab.
3. You’ll be redirected to a page where you can review your options.

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.
From the left navigation menu, select ‘Training’.
2. Under ‘Start Learning’, select ‘Access Now’.
3. You’ll be redirected to a portal where you can review your
   options.

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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!

Paid Time Off Reporting for Managers
Manager Resource

1

SMITH, SALLY (2391874)
Log Into Insperity and Time & Attendance
From your desktop, log into Insperity Premier and navigate to Time and Attendance
Select Reports | Generate Reports

Generate Report: Paid Time Off Report
Under Select Report choose the Paid Time Off Report
Modify date range you are looking to review. Most common would be Full Year to Today or Current Year
Move over the “Available” names you are looking to get information for. To select your entire team, you can use the < arrow to move all over.
Maintain all other preselected options
For Output Format select Save as MS Excel (.xls)
Click
Output
Excel spreadsheet listing each employee with total Vacation, Tracking Vacation, Sick, and Tracking Sick for the specified date range.
BRADY, TOM
FALLON, JIMMY
PROBST, JEFF
SWIFT, TAYLOR

Management & Resources
Paid time off management of your team is a tool in your manager kit that allows you to support your employees. Lack of use creates risk of burnout. Conversely, overuse can create lack of employee success and potential negative team dynamics. While both cases are rare, as a manager it is important that you are always aware and ensuring a healthy balance for your team members.
Employee PTO Information Sheet
Taking Time Off section of the All-Staff Carnegie Resource Guide

Contacts:
Questions regarding policy, procedure, or how to work with your team members to ensure success:

Allison Letizi - VP, HR hr@carnegiehighered.com
Questions regarding time off management and submissions, the Insperity Premier system, or other administrative functions related to time off:
Kris Peterson - Business Manager kpeterson@carnegiehighered.com

Last updated: March, 2024
1
Resource Guide
for Managers

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Our Management Philosophy
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Very simply, to be “people first” means to strive to prioritize the humans we work with—and our shared humanity—above all else.
A statement as big and bold as this one, in actuality translates into hundreds of individual decisions made each day by people like you. It’s the cumulation of consistently choosing to prioritize another person over tasks, ego, and achievement that creates trust.
Being “people first” does not mean avoiding tension, tough conversations, or difficult decisions—quite the opposite, in fact. Included in this guide are plenty of strategies, best practices, and processes for helping you to navigate the hard moments and be the best manager you can be, but all of the process in the world will not automatically make you a better people manager. So, between the lines, keep in mind that you’re in charge of supporting another human being; when in doubt, ask yourself, “how can I show this person that they matter?”
Finally, you’re a person, too. Don’t forget to give yourself grace as you go. Your management

of others will be ever-evolving and filled with lessons-learned.
What Does it Mean to be a
“People First” Company?

5
Most of us default to familiarity in our relationships and need to make a concerted effort to seek and nurture diversity of thought, practice, and perspective. One of the foundational truths behind our human personality assessment work is that differences are powerful—and essential for achieving paramount levels of success. Your role as a manager gives you more influence than you might realize. Use the input and access you have to drive thoughtful, intelligent, inclusive collaboration.
This looks like:
setting an example for your direct report(s) by the way you talk to and about others at Carnegie.
investing time in really getting to know our colleagues—what makes them excited, motivated, frustrated, or impassioned?
assuming positive intent.
being generous with your affirmation (even if the outcome wasn’t right, appreciating the effort goes a long way).
relinquishing control where it’s not needed.
being an active listener (are you actually listening or simply waiting to speak?).
empowering others to trust themselves.
Carnegie Managers
are collaborative
+

6
Innovation isn't limited to inventing groundbreaking products or services; it also includes finding new ways to improve internal processes, enhance team collaboration, or boost employee engagement. Being an innovative people manager involves finding creative and effective ways to lead and support your direct report(s).
This looks like:
fostering an inclusive environment.
creating safe spaces for idea sharing.
encouraging creativity and self-expression in all roles, not just those with “writer” and “designer” in the titles.
providing autonomy.
supporting calculated risk-taking; acknowledging that not every idea will succeed and

failure is a valuable learning experience that can lead to innovation.
being open to new ideas and not defaulting to “this is the way it has always been done.”
recognizing and rewarding innovation as you’re able.
embracing technology and software tools that can streamline processes, improve communication, and boost productivity.

Carnegie Managers
are innovative
+

7
Everyone wants to feel seen and heard. Supporting your direct report often means advocating on their behalf so that a path is cleared for them to be successful. It likely also includes helping your direct report learn how to advocate for themselves.
This looks like:
highlighting a team member’s expertise in front of others.
ensuring credit is given to the idea originator.
providing appropriate timelines for quality work.
confirming or expanding accessibility.
giving a seat at the table.
safeguarding non-working hours.
… and helping empower your direct report to: speak up in an important meeting, contribute new ideas, build time into their schedule to get work done, log off completely during PTO, volunteer for a challenging task, say no, ask the question, trust themself.

Carnegie Managers
position others for success
+

8
Improvements to process, culture, strategy, and our efforts to live into our corporate values can only be achieved by stopping to reflect on what has gone well and what has not. So, our commitment to be continually improving is equally a commitment to being reflective. In order to be reflective, we need to carve out time to reflect. While that sounds straightforward in theory, it’s easy to get caught up in task management and miss the opportunity.
This looks like:
asking our direct report for feedback on how we’re doing as a manager.

cultivating a growth mindset; embracing the idea that you can continuously improve and learn and encouraging others to do the same.
creating opportunities to witness your direct report “in action” so that you can provide specific feedback.
building debriefing moments into our processes.
circling back to our personal annual goals each quarter to assess progress.
investing in learning and development for yourself and your direct report(s).
participating in Carnegie manager training; reading up on leadership and management best practices.
watching other leaders/managers and noticing how they make you feel.
Carnegie Managers
are continually improving
+

9
We are genetically wired to relate our experiences, our desires, and our preferences to human personality. Our understanding of “self” drives how we behave and interact with the world. At Carnegie, we specialize in tapping into that DNA and helping people, organizations, and teams create meaningful human connection. Beyond our corporate methodologies and strategies rooted in this premise, we seek to live into the power of human connection by prioritizing empathy, vulnerability, and transparent communication. Ultimately, we want to see, celebrate, care for, and empower the humans with whom we interact—those behind the titles, screens, Slack channels, gifs, trivia wins, bingo fails, and weird humor.
This looks like:
being honest about how we’re doing.
asking for help.
owning up to our mistakes and being gracious when someone else makes a mistake.
checking in on each other.
being open-minded to other perspectives.
seeking to understand our distinct personalities/motivators.
pursuing joy, optimism, and fun.
Carnegie Managers
prioritize human connection
+

10
Is People Management Right for You?

A popular misconception exists that in order to advance in your career, you need to be a people manager.
At Carnegie, there are career paths for both those who want to manage others as well as individual performers.
If you're trying to discern whether managing others is right for you, consider the following four questions:
Do you feel overwhelmed by dealing with people?
Are you passionate about understanding others' dreams and motivations and helping them succeed? Do you genuinely want to contribute to the success of others? If your answer is "no" to any of these questions, you may want to reconsider taking on managerial role.
Do you avoid difficult conversations?
If handling challenging discussions is not your strong suit and you tend to avoid conflict, it might be wise to avoid a management position at this time.
Do you want the spotlight?
Are you able to share recognition and growth opportunities with others? If you're not ready to let go of personal accolades, becoming a people manager might not be the best career path for you.
Do you find administrative tasks annoying?
Do you find these tasks to be a drain on your energy and creativity? If you're not ready to accept the trade-off from more creative or technical work to administrative responsibilities, becoming a manager might not be the best fit for you.

Employee Management
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Day-to-day Management
Admin and Best Practices
This section includes instructions and guidance on fulfilling the role of a people manager, however please note that you are not expected to navigate the day-to-day of people management by yourself. You should be having regular conversations about your direct report(s) with your own manager and/or division leader to collaborate on problem-solving. Additionally, reaching out to other Carnegie managers for best practice sharing is highly encouraged.

a note about confidentiality

as you are trusted with information about your direct report(s), please assume that the information has been shared in confidence and should not be shared with or referenced in front of anyone else.

Reviewing Time in Harvest
Every Monday before 4:00 p.m. EST - Manager reviews direct report timesheets (Time > Pending Approval) and Unsubmitted list (Time > Unsubmitted). Manager reaches out to any direct reports who have unsubmitted sheets or missing/concerning time records.
Harvest Resource Guide for Managers
Approving PTO Requests
Direct reports will submit a request for PTO through Insperity. It is the manager's responsibility to review, approve, (Insperity > Time Off Approvals) and add to the appropriate PTO calendar on Google.
Confirm employee has the appropriate coverage while on PTO and has set the proper out of office notifications on Slack, Asana, and Email
PTO Requests for more than 10 consecutive days require approval from the manager and HR
Please reference the PTO Policy as needed or as you field questions from your direct report(s).
Manager Paid Time Off Reporting Guide
Approving Timesheets
Insperity timesheets for any part-time hourly employees must be approved at 10:00 a.m. EST on Monday before pay day (Insperity > Timesheets > Time Management). If there is an error on the timesheet, please contact Kris Peterson.
+
+
+
Time Management
Time management is one of the most important tasks of a manager. Effective use of your own time and that of those who report to you makes all the difference in establishing a healthy lifestyle and accomplishing work goals. While the below items might feel like check-the-box tasks, they actually reflect your and your direct report's ability to prioritize well, set realistic timelines, and communicate honestly about capacity. Don't underestimate the criticality of your attention to detail in this space.
Pro tip: The Insperity app for your phone provides the best user experience for submitting and approving PTO requests.

Go to Harvest
Begin by looking at their Harvest timesheet and/or talking with them about what project(s) have been taking up the majority of their time.
Insperity Trainings
There are several Insperity trainings on workload management:
8 Strategies for Managing Team Overload
Dealing with Seasonal Changes in Workload
1
+
Workload Management
If you're feeling like your direct report(s) are overwhelmed with work and/or have been noticing a lot of hours consistently logged in Harvest each week, consider taking the following steps to re-balance their workload:
Evaluate Priorities
Discern whether any of the work can be deprioritized in the short term—this may involve some investigation. If nothing can be deprioritized, continue on to the next step.
2
Permission to Skip
Look at the internal meetings to which your direct report is being invited. Check to see if there are any that can be reassigned or skipped altogether temporarily.
3
Eliminate the Add-Ons
See if there are ways you can help them eliminate or reassign some non-billable responsibilities— internal projects, tiger team / committee work, etc. — on a temporary or permanent basis.
4
Reduce Number of Clients / Projects
Confirm whether a client or project can be removed from your direct report's plate altogether. If there is no one else on the team with capacity, it may mean that it's time to hire. See this slide for next steps.
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14

Talking Prompts
Ideally, your direct report will come prepared with an agenda of items to discuss, but for the less prepared, you should always be ready to ask questions. For the seasoned professional, simply asking "how can I best support you right now?" will provide a great launching pad for a fruitful conversation. However, many direct reports need a bit more

guidance on determining how they need to be supported. The list to the right includes additional prompts to try.

Please note: as you have feedback to provide your direct report, please deliver the feedback as soon as you're able, rather than saving it for a 1:1 meeting.
What could you use more of right now?
What are you not working on that you do want to work on?
Where are you feeling challenged?
Are there any ideas you want given attention or explored?
What processes worked well for you this past week? Which didn't work as well?
Did any of your work this past week feel like a waste of time?
What are you most proud of over the past week, no matter how minor it may seem?
What's something in the last week you struggled with?
What's something you learned about this past week/month that was particularly exciting?
What's top of your mind right now?
What's draining you most right now?
What priorities are you thinking about this week?
What are some of your personal and professional goals? [Discern how you can help them reach them]
What was the most useful part of our conversation today?
The Art of the One on One
The Art of the One on One Meeting is a thorough guide to getting the most out of your 1:1, produced by Fellow app and referenced often by Carnegie managers.

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1:1 Coaching
Establishing a recurring day/time to connect with your direct report allows you to foster authentic connection and belonging, communicate feedback, problem-solve on work challenges, and invest in professional development. While you are responsible for scheduling the meeting, ensure your direct report knows that this time is theirs to use as they like. These 30-60 minute meetings should be set up weekly or biweekly on Google calendar and held via Zoom.

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Viewing Job Descriptions

All current job titles and their job descriptions are provided on our CD-Resources Drive for all employees to view.

Role Expectations

Each of us are more likely to feel engaged and satisfied when we know what is expected of us and how our work contributes to the company's goals, ultimately fostering a more productive and motivating work environment. Alignment on role expectations not only ensures clarity and transparency and reduces the potential for misunderstandings and conflicts, it also best sets up employees for success—it's hard to meet or exceed expectations when you don't know what the expectations are from the outset.

Milestones of Success

As part of onboarding any new hire, be sure to review their job description with them and talk through what success looks like in this role. Providing some milestones of success at 3 months, 6 months, and 12 months on the job is also helpful so your direct report has a reasonable understanding of how quickly they should be mastering the role responsibilities.

+

Updating Job Descriptions

If you have an update to make to an existing job description, please request comment access on the job description file from Samantha Smith in Talent Acquisition (ssmith@carnegiehighered.com). She'll collaborate with you to ensure that all edits are in line with best practices and are appropriate for that role.

As the job description gets updated, please be sure to review all changes with those currently in the role.

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Viewing Career Paths

All current role matrices / career path documentation are provided on our CD-Resources Drive for all employees to view.

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Staff Changes
Submit the Staff Changes Form if any of the following information changes about your direct report:
Employee is becoming a manager (is not currently)
Job title change
Manager change
Department/team change
Change to employee's weekly capacity
(# of hours)

Administration
Being a good people manager is not only a reflection of how well you can navigate a conversation, motivate someone to work hard, or provide actionable feedback. Below are administrative tasks that may seem small but have a big impact on your direct report(s) — particularly when they are not done well or in a timely fashion!
Reviewing Expense Reports
Manager is responsible for reviewing and approving any expenses submitted by their direct reports. You can find an overview of the expense process and what you should be looking for in the Carnegie Expense: Approval Guide.
Travel Policy + Resource Guide
Certify User Guide
Training Recording
PW: 8AVyZ@82

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Bias Incident Reporting / Form
At Carnegie, we seek to uphold a culture of inclusion across race, gender, age, religion, sexuality, personality, cognition, physical ability, and other dimensions of identity. All expressions of aggression toward another person are not welcome.
Reporting Procedure
Form
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“The Making of a Manager” by Julie Zhuo
We recommend reading this book, whether you are a brand new manager, or seasoned. “The Making of a Manager” provides examples, resources, and insight on common

situations you may encounter as a manager, along with strategies that focus on self-growth within your role.
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Manager Empowerment
Being a successful manager requires continuous education and learning experiences. Whether you are an experienced manager or new to the management role, there is always more to learn.
Successful Management Starts with You
If you have not already received this book, please reach out to Kris Peterson (kpeterson@carnegiehighered.com)
and ask for a copy to be sent to your home address.
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.
Insperity Learning Catalog
Insperity-Offered DEI Trainings

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18

19
The Apprentice
Your manager's team is growing, so you've been asked to manage a part of it going forward.
What to take advantage of:
You have a sense of what works and what doesn't.
You're able to ramp up quickly because you have context.
What to watch out for:
It can feel awkward to establish a new dynamic with former peers.
It's tricky to balance your individual contributor commitments with management.
+
Transitioning into Management
According to Julie Zhuo (author referenced on the previous slide), there are four common paths into a management role. Chapter Two of her book, "The Making of a Manager" highlights each route as well as the pros and cons of each. The content below has been taken verbatim from the book—make sure to get your copy to read more!
Navigating Your Circumstances
The Pioneer

You are a founding member of a new group, and you’re now responsible for its growth.
What to take advantage of:
You ‘ve done the job, so you know what it takes.
You get to build the team that you want.
What to watch out for:
You may not have much support.
It’s tricky to balance your individual contributor work with management.

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The New Boss
You’re coming in to manage an already established team, either within your existing organization or at a new one.
What to take advantage of:
People cut you slack in the beginning.
You start with a blank slate.
What to watch out for:
It takes a while to adjust to the norms of a new environment.
You need to invest in building new relationships.
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The Successor
Your manager has decided to leave, and you are taking their place.
What to take advantage of:
You have a sense of what works and what doesn’t.
You’re able to ramp up quickly because you have context.
What to watch out for:
It can feel awkward to establish a new dynamic with former peers.
The increase in responsibility can feel overwhelming.
You feel pressure to do things exactly like your former manager.
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Hiring
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20

21
manager
hiring manager
the person who the new hire will report to once they officially start

vs.
the person responsible for organizing and overseeing the interview process as well as selecting the final candidate; typically the leader of a team of people
21
A Guide to Hiring
Process and Strategy
This section includes all process requirements for hiring at Carnegie, as well as best practices for interviewing.

Build Your Case
Get Approval to Hire
Confirm Job Expectations
Recruit Candidates
Interview Candidates
Make an Offer

22
AS A MANAGER
If you're feeling like your direct report(s) are overwhelmed with work, reference this slide for strategies for easing workload crunch. If you've exhausted all ideas/options available to you, elevate the concern with your own manager. It may be that the team needs an additional resource.

AS A HIRING MANAGER
If you're a team leader who has worked with all managers on your team to create healthy workloads and the work is not slowing down, begin collecting evidence that an additional resource may be needed:
Review all Harvest timesheets (if your team tracks time). Note the number of hours logged each week over the last several months, as well as the billable/non-billable time splits. Does every team member have a reasonable number of hours logged each week and about 40 hours per week on average? Are the billable-non-billable time split goals being met?
Consider whether there are non-billable projects that can be paused temporarily.
Consider the time of year—does the team always feel a crunch this time of year or is this not indicative of a seasonal work cycle?

Bring the above information to your Divisional Leader (or work with another senior leader above you to do so). Each division leader will have additional ideas on how to relieve pressure temporarily and, if needed, can begin planning for another resource to be added.

Build Your Case
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Permission for all new hires needs to be obtained prior to posting for the position.

If your Divisional Leader is on board with making a hire, the following information needs to be provided via a bulleted email to your Divisional Leader, which will then be forwarded to Gary:
Title/Position
Target Start Date
Backfill Position or Net New Position
If Backfill: Who are we replacing?
Target Salary
Location (if specific)
Rationale for hire

Once you've received an approval response via email from the Divisional Leader, please forward that email to approvedhire@carnegiehighered.com.

Lastly, submit the New Hire Requisition Form. This is used to kick-start the recruitment process with the
Talent Acquisition team.
Get Approval to Hire
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Confirm Job Expectations
Each new hire requires a job description.

If you've hired for this position in the past, please find the most recent job description that was used and request comment-access from Samantha Smith on the Talent Acquisition (TA) team. Once comment-access is granted, mark up revisions as needed to reflect updates to the role and its responsibilities or requirements. Sam will review your notes and approve and/or discuss the edits. Reference these instructions to review expectations of your job description content. Finally, submit the revised job description to your Divisional Leader for approval.

If this is your first time hiring for this position, please create a job description using this template and referencing these instructions. Get the job description approved by your Divisional Leader and then send it to the TA team. (Note that what you write will get copyedited after you send it to the TA team.)

Once the job description is finalized, the TA team will schedule a brief conversation with you (the hiring manager) to discuss your plan for the interview process and your specific needs / ideal requirements for
the candidates.

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Recruit Candidates
As a first step, the Talent Acquisition (TA) team will post the role you're hiring for on Carnegie's website. Then, they'll share a link to the posting on our website with the company via the #general channel on Slack. Finally, the position will be posted on LinkedIn and relevant job boards.

As applications come in, the TA Team will review and identify candidates that match the position's requirements. They will then contact candidates and complete an initial screening to learn background information, salary expectations, and potential start date.

If the TA team is satisfied with the initial screen, you'll be tagged in Asana with screening note information—one card per candidate.

Note: As part of our continued drive to establish a bias-free process that supports inclusion for all, the below information will be redacted from each candidate's resume before being shared with the manager: Name, Email address, Phone number, Physical address, Links to social media accounts, Graduation date, Greek affiliation/ sorority/ fraternity, Religion, Gender

As a candidate moves forward in the interview process, information will be provided to the manager on the candidate's Asana card, as needed. Exceptions to this list can be made depending on the criteria of the open position.

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Interview Candidates
The Talent Acquisition (TA) team will coordinate schedules with you and any other team members you indicate for interviews. All candidate information to prep the hiring manager and team members for interviews will be found in the candidate's Asana card (however salary information will not be added to the Asana card).

Need help designing your interview process? See the next slide >>

The TA team will own all communication with candidates in helping them navigate the hiring process:
all interviews, any assignments/tests to be completed, rejection notices, and/or completing the CarnegieChem profile or the Carnegie application. All candidate updates will be posted via Asana in real time. If a response is needed from you (the hiring manager), the TA team will assign you to the card with a specific deadline in order to keep the process moving.

Do you have a candidate that is from a current client institution? The TA team will reach out to the Operations team to verify whether we are able to talk to the candidate (based on our contract terms). If we're okay to proceed the TA team will notify the Client Success Leader and Account Manager assigned to the institution.

Do you have an internal candidate? Wonderful! If the candidate approached you directly, ask them to confirm that their manager is aware (if they are not, encourage the candidate to tell them). Likewise, if the candidate reached out to the TA team, they will be encouraged to make their manager aware.
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Designing your Interview Experience
PLAN AHEAD
Note that each step in your interview process will take about one week. Keep your timeline and ideal new hire start date in mind while designing the experience.
MAKE A LIST
Refer to the Knowledge/Skills/Abilities section on your job description, as well as Carnegie's top five core values: Collaboration, Innovation, Client Success, Continuous Improvement, People First. Between the two you'll have the essential requirements for this role.
INTERVIEW OR ASSIGNMENT?
Identify which skills and abilities you can best evaluate in an interview and which could be evaluated through an assignment or demonstration instead.
Then, determine which specific pieces of knowledge, skills, abilities, and values you'll want to evaluate in each round.
You'll likely want one assignment and one or two interviews
in total.

CREATE A RUBRIC
To eliminate subjectivity, create consistency, and hold yourself accountable, create an evaluation rubric for each step of your interview process (assignments and every round of interviews should each have a unique rubric). Each item on a rubric should be clearly defined and scored using a 5-point scale. A clean version of each rubric should be saved to the Drive.
>>Two examples are on the following page.
DISCUSS
Review your plan with the Talent Acquisition team and make updates as needed.
IDENTIFY WHO SHOULD BE INVOLVED
Lastly, decide who from your team is best suited to be involved in each step of the interview process—who has the necessary experience to complete each rubric? You might decide that a panel interview would be better than an one-on-one interview or vice versa.
Be sure that each person involved in the process has a copy of the rubric they need to fill out and that they provide you with a filled-out version following the conclusion of each interview. A copy should also be provided to the Talent Acquisition team on the candidate's Asana card.

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CRITERIA

DESCRIPTION

SCALE

TOTAL

1. Detail-oriented

How specific was the project plan? How layered? How many factors and/or resources did the candidate consider?

1

Vague

2

3

4

5

Very detailed

2. Strategic

How much marketing strategy did the candidate pull into their response? How did they demonstrate their understanding of enrollment or marketing strategy in the way they assembled the information, the order, and the format in which they did so?

1

Basic

2

3

4

5

Very strategic

3. Creative

How creative was the presentation? Did they reformat/reimagine the content in ways that were different from how it was provided?

1

Unimaginative

2

3

4

5

Very creative

4. Quality Assurance

Were there errors in the project plan? Was it clear the candidate proofread their work? How clean was the presentation of the content?
1
Poor Quality
2
3
4
5
High Quality
A. Assignment Evaluation Rubric Sample
CRITERIA
DESCRIPTION
SCALE
TOTAL
1. Ambiguity, Uncertainty & Adaptability
How effectively do you anticipate this candidate can/will handle ambiguity and uncertainty, and adapt in the unknown?
1
Ineffectively
2
3
4
5
Very Effectively
2. Technical Skill: Marketing or Enrollment Strategy
How well did the candidate demonstrate their marketing or enrollment strategy abilities? Does this candidate contain the strategic thinking abilities needed for the demands of the position and its required outputs?
1
Unskilled
2
3
4
5
Very skilled
3. Versatility & Cross-functionality
How broad is this candidate's overall skillset and ability to deliver value beyond their core discipline/swim-lane?

1
Narrow
2
3
4
5
Broad

4. Professionalism + Preparedness
How effectively did the candidate demonstrate their professionalism the interview? Did they set up an appropriate Zoom background and ensure they were well-lit? Was it clear they had researched Carnegie in advance? Did they come prepared with questions?
1
Ineffectively
2
3
4
5
Very Effectively
B. Interview Evaluation Rubric Sample

Crafting Your Questions
BEHAVIORAL QUESTIONS
These questions ask candidates to provide specific examples from their past experiences to demonstrate how they've handled certain situations. They aim to assess a candidate's skills, behavior, and reactions in various scenarios.
For example: "Tell me about a time when you had to handle a difficult team member. How did you address the situation?"
COMPETENCY-BASED QUESTIONS
These questions focus on specific skills and competencies required for the job. They help assess whether candidates possess the necessary abilities to excel in the role.
For example: "Can you provide an example of a project where you demonstrated strong leadership skills?"
SITUATIONAL QUESTIONS
Similar to behavioral questions, situational questions present hypothetical scenarios to candidates and ask how they would handle those situations. These questions evaluate their problem-solving abilities and decision-making skills.

For example: "What would you do if you were given an urgent project with a tight deadline and limited resources?"

TECHNICAL QUESTIONS

These questions assess a candidate's technical expertise and knowledge related to the job. They're commonly used in technical roles and industries.

For example: "Explain how you would troubleshoot a network connectivity issue."

Crafting Your Questions

OPEN-ENDED QUESTIONS

Open-ended questions require candidates to provide detailed and thoughtful responses. They encourage candidates to share more information and insights.

For example: "Tell me about your approach to problem-solving."

CLOSE-ENDED QUESTIONS

These questions typically have short, specific answers and are useful for confirming facts or seeking concise responses. They are not as effective in eliciting detailed information.

For example: "Have you worked with Excel spreadsheets before?"

HYPOTHETICAL QUESTIONS

Hypothetical questions present candidates with imaginary scenarios and ask them to speculate on how they would respond. These questions assess creativity, critical thinking, and adaptability.

For example: "If you were given the opportunity to restructure the company's communication strategy, what changes would you implement?"

MOTIVATIONAL QUESTIONS

These questions aim to understand what drives and motivates the candidate. They help assess whether the candidate's aspirations align with the company's values and goals.

For example: "What excites you most about the prospect of working for our organization?"

Facilitating an Interview

PREPARE THOROUGHLY

Review the candidate’s resume, cover letter, screening notes, and any other relevant materials before the interview.

Create a list of questions before the interview to focus on the candidate’s strengths and inquire about specific requirements missing from their resume.

BE PUNCTUAL

Start the interview on time and allocate an appropriate amount of time for each candidate. Respect the candidate's time as much as you expect them to respect yours.

CREATE A WELCOMING ATMOSPHERE

Begin the interview with a friendly greeting and a brief introduction to put the candidate at ease.

PRACTICE ACTIVE LISTENING

Pay close attention to the candidate's responses. Show that you are engaged.

Do not assume what a candidate's response will be. Actively listen to what they are saying and build follow-up on their response.

USE STRUCTURED QUESTIONS

Craft well-thought-out questions that assess the candidate's skills, experience, and fit for this role, aligning with the rubric you've already created.

Structuring questioning ahead of time also helps to organize your thoughts as the conversation flows.

FOLLOW UP ON ANSWERS

Dig deeper into responses to gain a better understanding of a candidate's thought process and accomplishments.

What To Do

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Facilitating an Interview

TAKE NOTES

Jot down key points during the interview to help you remember a candidate's strengths, weaknesses, and unique qualities.

RESPECT PRIVACY

It's easy to fall into making small talk with the candidates you're interviewing when you first connect with them. While it might seem polite to ask them questions about themselves, please note that many of those questions should not be asked in an interview scenario. The Equal Employment Opportunity Act (EEOA) prohibits us from asking questions that might lead to discrimination or the appearance of discrimination. Bottom line: you cannot ask questions that in any way relate to a candidate's: Age, Race, Ethnicity, Gender, Sex, Sexual orientation, Country of origin, Birthplace, Religion, Disability, Marital status, Family status, Pregnancy, Salary history (in some states)

NOTICE NON-VERBAL CUES

Pay attention to the candidate's body language and tone of voice. These cues can provide additional insight to their responses.

ALLOW QUESTIONS

Provide the candidate with an opportunity to ask questions about the team, role, and work culture. Try to be open and transparent, while remaining professional and unbiased.

END POSITIVELY

Close the interview by thanking the candidate for their time and explaining that the talent acquisition team will follow up with them regarding the next steps.

What To Do

Facilitating an Interview

DON'T RUSH

Avoid hurrying through the interview or cutting off the candidate's responses. Give them sufficient time to elaborate on their answers.

AVOID LEADING QUESTIONS

Construct questions that do not guide the candidate toward a particular response. Allow them to provide honest, unguided answers.

AVOID INTERRUPTIONS

Minimize distractions during the interview. Turn off your notifications to give the candidate your full attention.

DON'T OVERSHARE

While some friendly conversation is okay, avoid divulging personal information or discussing potentially controversial topics.

AVOID NEGATIVE BODY LANGUAGE

Non-verbal cues like eye-rolling, crossing arms, or appearing disinterested can send the wrong message to candidates.

DON'T COMPARE CANDIDATES DIRECTLY

Avoid discussing one candidate in comparison to another during the interview. Each candidate should be evaluated on their own merits.

DON'T ASSUME FAMILIARITY

Even if the candidate has connections within Carnegie, don't assume they have insider knowledge. Provide necessary context about the company and role.

What NOT To Do

Make an Offer

Upon identifying the best candidate, send your Division Leader a bulleted email with the

following for approval:
Division
Name
Title/Position
Manager Name/Title
Budgeted/In Current Forecast (yes or no)
Target Start Date
Target Salary
Location
Rationale
Your Division Leader will then request approval from Tyler B., Scott N., or Meghan D. (depending on the division) and, if necessary, from Gary.

Upon receipt of approval, forward the email thread to approvedhire@carnegiehighered.com
HR will then conduct reference checks.

The Talent Acquisition team will generate an offer letter and non-compete agreement and send both to the candidate as well as benefit and 401(k) information.
Alterations to any job offer letters or non-compete documents must be coordinated with Allison Letizi (hr@carnegiehighered.com) and Meghan Dalesandro (mjd@carnegiehighered.com).

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Onboarding
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Onboarding a New Hire
Process and Communication
This section includes details about the timeline, task management, and communication for onboarding new hires

at Carnegie.

When an Offer is Accepted
New Hire Preparation: One Week Before First Day
Onboarding Day One
Onboarding Day Two
General Information
Week One Checklist
The First 90 Days
manager
Note: whenever you see a task listed next to a red rectangle on the following pages, that task is yours to complete. No one will be checking up on you to make sure it's done, however your new hire's experience will be impacted.

When an Offer is Accepted
Immediately Following Offer Acceptance
ownership + action items
Human Resources
IT request is submitted for new employee email address and equipment.
Operations
A card is created on a "New Hire Onboarding" Asana board that the Ops/HR teams manage. Tasks are generated and assigned to various Operations and Human Resources staff.
The new hire's manager (you!) is added as a collaborator to their card.
Human Resources
A background check is run.
Human Resources
HR Email #1 is sent to the new hire, requesting confirmation of their mailing address inquiring about whether they need an accommodation of any kind. (Should an accommodation request be made, it will get sent to Meghan Dalesandro for approval.)
Manager
Welcome Email from Manager is sent to new employee (see this slide for sample).
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New Hire Preparation
One-to-Two Weeks Before First day
action items + ownership
Info. Technology

A laptop is set up for the new hire and a Carnegie email address is created. A temporary password is set up by IT and sent to the new hire's residence, written on a note inside the computer box.

Info. Technology

The new hire is added to Asana, Zoom, and Slack

Human Resources

HR Email #2 is sent to the new hire with equipment tracking information and login credentials. After the equipment has arrived, a follow-up email is sent to confirm that the new hire has possession of the equipment and is able to log in.

Operations

A personalized onboarding Asana board is created using the current centralized template specific to your team. (If the Operations team does not have a template set up for your department yet, they will reach out to you to collaborate in creating one.)

Manager

The personalized onboarding Asana board is reviewed and customizations are made as needed. Once it's finalized, the new hire's manager informs the Operations team via the new hire's Asana card on the New Hire Onboarding board to which they've been added as a collaborator.

New Hire Preparation

One Week Before First day

action items + ownership

Operations

Calendar events are created using the standard New Hire Centralized Onboarding Schedule (see this slide and this slide). The new hire's Carnegie email address will be invited to all non-optional sessions.

Manager

A 30-minute team-welcome and one-on-one with manager is scheduled on the new hire's Day One of work. The new hire's Carnegie email address is invited.

Human Resources

HR Email #3 is sent to the new hire with a Drop Secure link for identification documentation. Once documentation has been received, a confirmation email from HR is sent to the new hire.

Operations

Ops Email #1 is sent to the new hire with a welcome note and their centralized onboarding schedule for Day One and Day Two of work. The new hire's manager and all session hosts are copied.

Human Resources
The new hire is added to Insperity and Certify.
Human Resources
HR Email #4 is sent to the new hire with instructions for both Insperity and Certify, the holiday schedule, a link to the All-Staff Carnegie Resource Guide, and a link to Timestar.
Operations
The new hire is added to Tinman, Harvest, the #harvest-support Slack channel, the Carnegie - Training + Events calendar, and your division-specific PTO and travel calendars.

Email Communication with New Hire
WELCOME EMAIL FROM MANAGER
HR EMAIL #2
TA Team sends equipment tracking information and login credentials.
Shortly after offer has been accepted by new hire, the new hire’s manager sends a welcome email. See the sample script on the following page.
The Ops team sends the centralized onboarding schedule with Zoom links for the new hire’s first two days at Carnegie.
TA Team confirms new hire has received all equipment and can login successfully.
Kris Peterson sends instructions to look for emails from Insperity and Certify, as well as links to Timestar, the Holiday Calendar, the Address Release Authorization form, and the All-Staff Resource Guide
HR EMAIL #4
OPS EMAIL #1
HR EMAIL #1
In response to receiving a signed offer letter, the TA team confirms the new hire’s mailing address and asks about accommodation needs.
HR EMAIL #3
Kris Peterson sends Drop Secure Portal link and instructions for uploading identification documentation.
CONFIRMATION EMAIL
Confirmation that documents have been received is sent by Kris.
CONFIRMATION EMAIL

NEW HIRE’S
FIRST DAY

Sample Welcome Email from Manager

Hi [insert new hire name],
I am so happy to welcome you to Carnegie! My name is [insert your name], and I will be your manager on the [insert team name]. We know you are going to be a valuable asset to Carnegie and can't wait to see what you accomplish!
Over the next few days / weeks leading up to your first day on [insert start date], you will receive several emails to begin your onboarding process. One of these will include a Day One and Day Two onboarding schedule. This will all be sent to your personal email address and as well as your new Carnegie email (namehere@carnegiehighered.com). I'll also be scheduling time for the two of us to connect on your first day and time for you to meet the rest of the team! Our general business hours are Monday through Friday, 8:30 a.m. – 5:30 p.m. local time, so plan to work those hours for at least the first week. We can talk more on your first day if you want to adjust your standard hours slightly.
Once again, we are so happy to have you on our team and hope you are looking forward to your first day as much as we are. If you have any questions, please don't hesitate to reach out to me via email anytime.
Sincerely,
[insert manager name]
NOTE: if your new hire operates in the PST time zone, you'll want to note that their first two days will be an adjusted schedule:
8:00 a.m. – 5:00 p.m. PST.

Onboarding Day One
action items + ownership
schedule
EST TIME ZONE
PST TIME ZONE
Morning of Day 1 for EST/CST
Afternoon for MST/PST
Welcome - Your Home Team
11:00 a.m. - 12:30 p.m.
8:00 a.m. - 9:30 a.m.
Session 1 - Carnegie 101
1:30 p.m. - 2:30 p.m.
10:30 a.m. - 11:30 a.m.
Session 2 - Communication Tools + Resources I
3:00 p.m. - 3:30 p.m.
12:00 p.m. - 12:30 p.m.

Session 3 - Timesheets + Expense Reports
3:30 p.m. - 4:00 p.m.
12:30 p.m. - 2:00 p.m.
Session 4 - Human Resource 101
NEEDS TO BE SCHEDULED BY MANAGER
Human Resources
The Talent Acquisition team sends a welcome note via Slack.
Operations
The new hire is added to the New Hire Cohort Slack channel (for all new hires within the current quarter of the year).
Manager
An all-company email is sent announcing the new hire (everyone@carnegiehighered.com), sharing a few professional/personal facts. Please see instructions on the following page.
Human Resources
Kris Peterson meets with each new hire so that they can show her their ID documents over Zoom.

New Hire Intro Email
WHY?
We ask all managers to send an email to everyone@carnegiehighered.com introducing their new hire on their first day to make the new hire feel welcomed and important right from the start. (It also serves as a foundation for creating connection as others from the company might identify with one or several of the personal/professional facts shared.)
WHAT
Please ensure that your welcome email includes the following pieces of information:
New hire's name and phonetic pronunciation
Some detail about where they are located—state / time zone at minimum
One or two professional background details, as well as how we anticipate their professional background will contribute to our clients' success
A fun fact or two—personal or professional

Welcome - Your Home Team
PURPOSE: Relationship-building with the people with whom the new hire will work closely on a day-to-day basis.
FACILITATOR: New hire's manager
CONTENT:

Meeting 1 (30 minutes) - Manager Welcome
Getting to know each other
Establishing working hours
Scheduling a recurring 1:1
Meeting 2 (30 minutes) - Team Welcome or as determined by manager / division

Session 1 - Carnegie 101
PURPOSE: Provide a high-level overview of the company's past, present, and future, including how our new hires will help us usher in the future.
FACILITATOR: Operations
CONTENT:
Welcome
Group Introductions
Carnegie history + current day (mission, vision, values, goals, competencies, differentiators, personality)
Working for Carnegie and Remote Work Expectations
Office hours + accessibility
Week One Checklist
Zoom conduct
Scheduled meetings (all-company call, 1:1 with manager)

Day One Curriculum in Detail
Session 2 - Communication Tools + Resources I
PURPOSE: Familiarize new hires with our communications norms and platforms.
FACILITATOR: Operations
CONTENT:
Company Announcements
Platforms - Slack & Asana
Communication Norms
All Staff Resource Guide

Session 3 - Timesheets + Insperity
PURPOSE: Educate new hires on Carnegie's philosophy behind time management and time off, how to navigate our time-tracking systems, and how to manage expenses.
FACILITATOR: Operations
CONTENT:
Harvest + Billable Time

Insperity Portal Overview
Certify + Expense Reports

Session 4 - Human Resources 101
PURPOSE: Familiarize new hires with the primary contacts behind Human Resources support and educate new hires on the benefits they have available to them.
FACILITATOR: Human Resources
CONTENT:
Benefits
401K
Employee Handbook
Employee Referral Program
New Employee Paperwork Completion
PTO, Summer Fridays, Holidays
Sexual Harassment Training
Bias Incident Response Protocol + Form
Inclusive Language Workplace Guide
Educational Assistance Program

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Onboarding Day Two
action items + ownership
schedule
EST TIME ZONE
PST TIME ZONE
11:00 a.m. - 12:30 p.m.
8:00 a.m. - 9:30 a.m.
Session 5 - Communications Tools + Resources II
1:00 p.m. - 1:30 p.m.
10:00 a.m. - 10:30 a.m.
(if applicable) - Introduction to Tinman^
2:00 p.m. - 2:30 p.m.
11:00 a.m. - 11:30 p.m.
Session 6 - Getting Involved at Carnegie*
3:30 p.m. - 4:30 p.m.
12:30 p.m. - 1:30 p.m.
Session 7 - Higher Ed 101*

3:30 p.m. - 4:30 p.m.
12:30 p.m. - 1:30 p.m.
(managers only) People Management at Carnegie
Human Resources
An email reminder is sent to the new hire about I-9, W-4, Direct Deposit (3 days to complete), and benefits selection (30 days to complete).
^Currently, all new hires on the Client Success, Business Development, and Digital Marketing teams are invited to this training.
*The two asterisked onboarding sessions are offered monthly on the third or fourth Tuesday of the month. For some new hires, these will occur on their second day of work and for others, these will be close to the end of their third week.
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Session 5 - Communication Tools + Resources II
PURPOSE: Familiarize new hires with the high-level functionality of our primary platforms.
FACILITATOR: Operations
CONTENT:
Gmail
Asana
Google Drive
Harvest + Non Billable Buckets

(if applicable) - Introduction to Tinman
PURPOSE: Familiarize new hires with the purpose and organizational structure of Tinman.
FACILITATOR: Operations
CONTENT:
What is Tinman? When is it used?
Client overview
How to search
Client landing page
Running a report
Alert Dashboard
Day Two Curriculum in Detail
The below two sessions are offered monthly:
Session 6 - Getting Involved at Carnegie
PURPOSE: Familiarize new hires with ways to become involved at Carnegie and connect with other colleagues.
FACILITATOR: Operations

CONTENT:
TeamCare
Employee Resource Groups
Professional Development

Session 7 - Higher Ed 101
PURPOSE: Familiarize new hires with higher education terms, concepts, organizational structure, and trends.
FACILITATOR: Rotating hosts from across the company
CONTENT:
Higher Ed Structure + Terms
Higher Ed Macro Trends + Challenges
Carnegie + the Vendor Market

(managers only) People Management at Carnegie
PURPOSE: Educate managers on the basic management expectations at Carnegie as well as the resources available to them.
FACILITATOR: Operations
CONTENT:
Communication channels: slack channel, email group
Review Resource Guide for Managers
Basic approvals and processes
Scheduling 1:1s with your direct reports
Escalation protocols
Carnegie culture building
CarnegieChem
Ongoing manager training

While much of this information is available for employees to read about in the Employee Handbook, please ensure that you schedule time to discuss the below expectations with your new hire during your first week. Establishing appropriate expectations right away allows you to avoid mutual frustration down the road.
General Information

Working Hours + Equipment
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 your direct report(s) 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 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 believe that other equipment is required for an employee to complete the primary responsibilities of their job, please contact Samantha Smith in Human Resources.

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.

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

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.
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
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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.
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
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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.
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

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The First 90 Days
action items + ownership
Manager
At the end of the first week, walk through the Week One Checklist and ensure the new hire has completed all items.
Manager
Schedule a recurring 1:1 with your new hire either weekly or biweekly (30-60 min).
See this slide for 1:1 best practices.
Operations
After being employed for 30-35 days, all new hires are invited to complete a New Hire Feedback survey with question about their recruitment, interviewing, and onboarding experience.
Human Resources
Allison Letizi reaches out to the new hire after two months to check in and see how they are doing/feeling.
Human Resources
The new hire's manager is sent Carnegie's 90-day evaluation form.
Manager
The 90-day evaluation form is provided to the new hire, a due date is communicated, and a meeting is scheduled to discuss the filled-out form.
Manager
Following the scheduled meeting, the filled-out form is sent to hr@carnegiehighered.com to be saved to the employee's record.

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Performance Management
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Evaluating Performance
Process and Facilitation
This section includes all process requirements for formal performance evaluation moments at Carnegie, as well as best practices and facilitation guides.

90-Day Evaluation
Annual Evaluation
Staff Promotion
Performance Improvement Plan (PIP)

Facilitating a Review Meeting
ELIMINATE WORRY
We want to do our best to eliminate any worry or fear about any of our standard performance reviews. These forms and conversations are meant to be a check-in and should be representative of conversations you're regularly having with your direct report. If we're doing our job as managers, nothing discussed should come as a surprise.
BE CONSISTENT WITH SHARING FEEDBACK
When reviewing your direct report's answers on the evaluation form, take note of long-winded or over-detailed narratives. This could be a sign that they don't feel you're aware of the work they're doing.
Additionally, if you feel like you're talking a lot, it could be a sign that feedback isn't being provided on a consistent basis. In these scenarios, set some goals with your direct report to have more regular feedback-sharing conversations moving forward.
BE SPECIFIC
If your new hire is doing an excellent job, be sure to be specific with your affirmation. It's more helpful to say, "You communicate action items well on calls" versus "You're a natural on calls!" Be intentional with your feedback so they know exactly what's working.
In the same vein, be sure that you have at least two or three specific pieces of advice or constructive feedback included in your manager comments. It's not helpful for anyone if your remarks are vague or entirely positive.

90-Day Performance Evaluation

Carnegie’s 90 day performance review is an opportunity for new hires to tell you about their experience thus far, and for you as a manager to provide feedback on their progress. The review process is meant to be thoughtful but should simply serve as a prompt for an intentional check-in conversation. If you have questions or concerns about the review process or delivery, feel free to discuss them with your manager or connect with Human Resources.

Process

Human Resources

1. Human Resources team will initiate the process by sending you the evaluation form, a timeline for completion, and instructions.

Manager

2. Please take a moment to review the questions.

Manager

3. Schedule time in the next one-to-two days to review the process and form with your new hire.

Employee

4. The new hire should complete the review form within one week of your discussion, and you should advise them to answer honestly and as thoroughly as they feel necessary, but bullet points or one-to-two sentence answers to each question is perfect. Once your new hire has completed the form, they should return it to you.

Manager

5. Provide feedback to each of the new hire’s answers in the evaluation form. There’s also a section at the end to add any additional comments you may have.

Manager

6. Once you’ve finished adding feedback, schedule a meeting with the new hire to discuss what you’ve both written.

Manager

7. After that, sign the review form and send it to your new hire to countersign.

Employee

8. Employee will countersign the form and return to you.

Manager

9. Send the completed and signed form to hr@carnegiehighered.com to complete the review process.

Which parts of your role are you enjoying most?
What can you do as a manager to continue pushing for success in those parts of the role?
Is there an opportunity to incorporate more of these parts into their day-to-day? Are there ways to get involved at Carnegie that will give them more of a space to excel in these areas?
Have you observed them being successful in these areas?
Are there parts of your role that don't excite you?
What can you do as a manager to make the less desirable parts of the role more enjoyable?
How large of a part do the things identified play in the role? Should you realign expectations around those areas? Is there confusion around these parts of the role that is causing disinterest?
How are they performing in these areas?
Has anything about your role surprised you?
Is there anything surprising about their answer? Are there any expectations that need to be further communicated?
Is their answer something that is included in their job description?
Could there have been better communication about any parts of the role during the interview and onboarding process?
90-Day Performance Evaluation
The purpose of this review is to provide an opportunity to reflect upon their performance so far and for managers to provide feedback on their progress. The review asks questions that are meant to expand on conversations managers should already be having with their direct reports. Below are the review questions and things to keep in mind when reviewing and responding to new hire feedback.
Facilitation Guide
Summarize which areas of your role you're feeling successful in.
Do you agree/disagree? Are there other areas where you're seeing success that they didn't mention?
Are these the areas that are vital to the role?
How can you continue to ensure successful behaviors continue?
Summarize which areas of your role you need more support.
Do you agree/disagree? Are there other areas where you think they need growth that they didn't mention?
Are these areas that are vital to the role?
Are they struggling or lack confidence in these areas, or do these areas challenge them in a way they aren't used to?
What are some goals you have for yourself within your role?
How can you support their goals? Are they well aligned with the requirements of the role?
Are the goals realistic for the role?

What goals do you have for the new hire? Are there soft skills to add to the list (public speaking, taking initiative without being asked, etc.)?

Annual Performance Evaluation

Carnegie performs annual performance reviews for all employees. The purpose of this review is to provide employees with an opportunity to reflect upon their performance throughout the year and for managers to provide feedback and growth opportunities. The review asks questions that are meant to expand on conversations managers should already be having with their direct reports. Below is the review process, which will take place mostly in Insperity.

Process

Human Resources

1. Human Resources team will initiate the process by sending the entire company a timeline for completion and instructions. Please note how important it is to complete these evaluations within the timeframe provided.

Manager

2. Please take a moment to review the questions.

Manager

3. Schedule time in the next one-to-two days to review the process and questions with your new hire. Advise them to answer the evaluation questions honestly and as thoroughly as they feel necessary, but one-to-two sentence answers to each question is perfect.

Employee

4. The employee will receive a link to the evaluation form within two weeks of your discussion. Once they’ve submitted their responses, you’ll receive an email with the link to the form letting you know it’s your turn.

Manager

5. Provide feedback to each of the employee’s answers in the evaluation form. There’s also a section at the end to add any additional comments you may have. Once finished, submit the form for HR review.

Human Resources

6. Allison will review and let you know when you can proceed with the process via an Insperity-generated email with the form link.

Manager

7. When you receive an email from Insperity, set up a meeting with the employee to discuss what you’ve both written.

Manager

8. After having facilitated that meeting, submit the review in Insperity.

Employee
9. Employee will receive one final Insperity email to review your final comments and click "Complete Review".
Human Resources
10. The review process is marked complete by HR.

Which parts of your role are you enjoying most?
What can you do as a manager to continue pushing for success in those parts of the role? Is there an opportunity to incorporate more of these parts into their day-to-day? Are there ways to get involved at Carnegie that will give them more of a space to excel in these areas?
Have you observed them being successful in these areas?
Are there parts of your role that don't excite you?
What can you do as a manager to make the less desirable parts of the role more enjoyable? How large of a part do the things identified play in the role? Should you realign expectations around those areas? Is there confusion around these parts of the role that is causing disinterest?
How are they performing in these areas?
Summarize which areas of your role you're feeling successful in.
Do you agree/disagree? Are there other areas where you're seeing success that they didn't mention?
Are these the areas that are vital to the role?
How can you continue to ensure successful behaviors continue?
Annual Performance Evaluation
The purpose of this review is to provide employees with an opportunity to reflect upon their performance throughout the year and for managers to provide feedback and growth opportunities. The review asks questions that are meant to expand on conversations managers should already be having with their direct reports. Below are the review questions and things to keep in mind when reviewing and responding to employee feedback.
Facilitation Guide
Summarize which areas of your role you need more support.
Do you agree/disagree? Are there other areas where you think they need growth that they didn't mention?
Are these areas that are vital to the role?
Are they struggling or lack confidence in these areas, or do these areas challenge them in a way they aren't used to?
What are some goals you have for yourself within your role?

How can you support their goals? Are the goals well aligned with the requirements of the role?
Are the goals realistic for the role?
What goals do you have for the employee? Are there soft skills to add to the list (public speaking, taking initiative without being asked, etc.)?
What are some professional development goals that your manager can support you with?
Is the employee interested in taking on more responsibilities? Do you see the employee as a manager of people or a service? If so, how can you support them in growing into that role?
Is there any area they could improve on prior to being assigned additional duties?
Are there courses in Insperity that may help with some of their goals or the goals you have for them?

Staff Promotion
One of the most important aspects of your role as a manager is to help your direct report(s) grow professionally and, if it’s one of their goals, help advance their career. After seeing your direct report(s) progress over time, how do you know when they are ready to be promoted? And what are the next steps in making the promotion a reality?
Recognizing Achievement and Growth
Signs of Promotion Readiness
They require very little direction/oversight on their daily responsibilities.
They manage failure well—able to admit when they’ve made a mistake, learn from it, and move on without making the same mistake in the future.
They excel as a teammate.
They bring a positive attitude to work, which in turn inspires and motivates those around them.
They help identify and create best practices for the team.
They are interested in and capable of training new hires or others on the team.
They are outperforming their peers.
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Next Steps
While you may already do this on your one-on-ones, speak with your team member about their goals and future path hopes.
Gather information, review their current role's rubric, and determine if you are ready to recommend for promotion.
Discuss with your manager the recommendation.

Promotions can happen throughout the year, as an employee demonstrates all signs of promotion readiness. All promotions must be reviewed with and approved by the Divisional Leader who will submit a list quarterly to the Finance team.
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Performance Improvement Process
As we always say, people are the most important component of Carnegie. With that, a goal of ensuring success and professional satisfaction for our team members is a priority for all managers. One of the tools we have available to achieve this is the Performance Improvement Plan (PIP) process. Managers can leverage this plan either in part (success after Phase 1) or in whole in order to foster clear communication to an employee that is struggling with their role.
Of note, Performance Improvement Plans are not termination triggers. Carnegie is proud of the several successful employees that have gone through a plan, successfully completed it, and continue to thrive. This tool is focused first and foremost on the success of the employee.

Process Summary
Awareness
Verbal Warning
Written Warning
Performance Improvement Plan
Phase 1: Awareness*
All managers should have an ongoing and clear line of sight to their team member's work output, productivity, quality, and attitude. By being aware of their work, it establishes a foundation of understanding to know when to celebrate and, at times, when to correct. Leveraging one-on-ones to discuss work and any struggles is a perfect starting point. Also, in times of issues, addressing those in the moment for correction allows items not to bubble up or grow. Ongoing communication, both through electronic channels (email, Slack, Asana, etc) and verbal is key.
As a manager, you should begin to document any issues that seem to be showing a pattern for your direct report (s).
For documentation of concerns: either create a document on your computer or within your MyDrive or email yourself the following information:
the date and a description of the repeated issue/concern
how you observed or were notified about the issue
any conversations or steps you took to address the issue
if you have a conversation about the issue, it's best practice to follow up that conversation

with an email summary, creating an “paper trail” to refer back to for everyone
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*At all stages and for any time through management, you can and should approach your manager, your division leader, or Human Resources at any time to discuss any difficult situations. Supporting each other, strategically planning options to support the employee, and thoughtfully navigating a difficult situation is best executed as a team.

Performance Improvement Process
Phase 2: Verbal Warning*
If an employee is struggling with their work, productivity, attitude, or any other element that is holding them back from being successful in their role, it is important for managers to address. When these situations are showing patterns or consistency, the first formal step to take is issuing a verbal warning. Communicating clearly and without interruption in specific terms is imperative. Noting what you’ve seen, how to correct, and that you will work together to ensure it is fixed is the ideal conversation. Further, having a follow up plan to circle back is on you as the manager.
Although this step does not require written confirmation, it is always helpful to document these situations. You can either follow up with the person in writing or email yourself a summary of the conversation so that you have a log of the topic covered, the plan to fix, and the time it was delivered.
You as the manager should continue to document specific issues (see previous slide for instructions).
At this time, you should discuss the situation with your direct manager if they are not yet aware.
Phase 3: Written Warning*
If the verbal warning and follow up has not created any improvement by the employee, the next course of action will be a written warning. While you should always continue to communicate verbally in both one-on-ones and in specific situations, following up those conversations in writing is now required. Be sure to follow each conversation with an email summarizing the situation, detailing the steps to take to correct, and include the date you will be following up to check in.
If improvement is still lacking and the employee is not successful in the noted areas, escalation to a formal Performance Improvement Plan (PIP) is the next step.
You as the manager should continue to document specific issues.
At this time, you and your manager should discuss the situation with your division leader if you haven’t done so already.
*At all stages and for any time through management, you can and should approach your manager, your division leader, or Human Resources at any time to discuss any difficult

situations. Supporting each other, strategically planning options to support the employee, and thoughtfully navigating a difficult situation is best executed as a team.

Performance Improvement Process

Phase 4: Performance Improvement Plan*

The next step in the process includes notifying Human Resources to create a Performance Improvement Plan for the employee. Schedule a call with Allison Letizi, VP, Human Resources, to discuss the situation (if you have not already) and provide any documentation you have to date. HR must be involved at this step. HR will work with you to write a plan that is detailed, clear, and actionable. The plan must include items that indicate a successful PIP completion. The timeline of the PIP can range from 30-60 days. You will partner with HR to determine the schedule, delivery, and content.

Once the PIP is ready, send it to the Division Leader for review. After approval, schedule a PIP meeting with the employee. HR can provide training and instruction on effective delivery.

The PIP meeting with the employee will include notifying them that we have created a plan to help them succeed in this role. The details on the requirements can be shared and detailed. The meeting can include you as the manager and your manager or HR as needed.

You will set up a schedule with the employee to track the progress during the term of the PIP. Please send the PIP and schedule to HR.

At the completion of the PIP schedule there will be a meeting scheduled with the employee to discuss next steps. There are three potential outcomes:

The employee has successfully completed all requirements of the plan and returns to their position and is no longer on a PIP.

The employee has made some notable improvements, however has not fully met all the requirements. A new schedule is set and the employee remains on the PIP until that time for future evaluation.

The employee has not met the requirements of the plan and has shown little to no progress. Carnegie provides a separation plan for the employee and their employment is terminated.

Please communicate with HR once the outcome is determined.

*At all stages and for any time through management, you can and should approach your manager, your division leader, or Human Resources at any time to discuss any difficult situations. Supporting each other, strategically planning options to support the employee, and thoughtfully navigating a difficult situation is best executed as a team.

Staff Leaving Carnegie
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Facilitating an Exit
Process and Communication
Employee resignations and terminations are something we hope to do rarely. However, in the times they are needed, it is critical that we execute them in an organized and respectful way. All employee information is always confidential, and above all else managers MUST keep any information at the strictest level of confidence and respect. There are no exceptions.

Resignation
Involuntary Termination

Communicating About an Exit
BE THOUGHTFUL
Every employee departure is unique, so no process supersedes thoughtful needs of a situation.
CONFIDENTIALITY
Employee departure details are confidential. If you're unsure if you can share information, assume you shouldn't and reach out to Human Resources for counsel.
PERSONAL INFORMATION
In absolutely no case should personal information or departure details be provided to anyone at any time.
Exception: the employee requested that we do give that information or have approved we can share.
Never provide personal contact information for any employee that is departing without prior approval or ideally, if they chose to share.
ANNOUNCEMENTS
The company does not do all-company announcements of departure out of respect and need.
The manager (you) and divisional leader will coordinate the communication plan.
Immediate team
Tangent/larger team

Division
Other divisions connected to the role (coordinate with that divisions leader)
The manager (you) and divisional leader will execute the communication plan.

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Resignation
Your direct report has informed you that they are leaving Carnegie for another opportunity. What happens next?
Manager
1. Upon resignation, send a note to HR (hr@carnegiehighered.com) with the following information:
Employee's last day
Reason for resignation
Any additional/unique information specific to the situation HR should be privy to
Manager
2. Ask the departing employee to send a formal, signed resignation letter to hr@carnegiehighered.com.
Manager
3. Ensure that departing employee has submitted Harvest data through end of day of final day.
Manager
4. If the departing employee is a manager, please notify HR of the new reporting structure for timesheet and expense report approvals.
Human Resources
5. HR will provide any termination documents (exit interview form, company property checklist) and information (benefits, 401(k), address changes, and Insperity access) to the departing employee and will schedule an exit interview.
Human Resources
6. HR will notify HelpDesk to remove all network access. Emails will be set to forward to manager unless otherwise determined. Asana tasks will be reassigned to manager unless otherwise stated by manager.
Manager
7. Manager will organize and change any other program passwords that sit outside of the domain's access. Upon change, notify HR that changes have been finalized.
Human Resources
8. HR will ensure all company property including computers, monitors, power cords, keys,

etc. are returned and in good working condition. Remote employees will be provided shipping instructions from HR.
Employee
9. Employee will receive final payment on next payroll date.
Human Resources
10. HR will remove from organizational chart.
Human Resources
11. HR will notify HelpDesk that all equipment has been received.
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Involuntary Termination
There are a variety of reasons why an involuntary termination may be determined as the best course of action.
Some of the most common include:
the employee's skill set is not the right fit for the role
the employee has exhibited concerning behavior that is negatively impacting others
the divisional budget can no longer support the role
What happens next?
Where involuntary termination can be avoided, it is. No one wants to see a stellar employee leave the company.
In scenario 1 listed above, our Performance Improvement Process is employed to see if the employee's skill set can be improved or developed to meet the requirements for the role. (We've seen this successfully implemented a number of times!)
Where a Performance Improvement Process does not work or in scenario 3 listed above, the Division Leader will work in concert with Human Resources, People Success Operations, and other Division Leaders to understand whether another open role at Carnegie could be a good fit for the employee. In addition to currently open roles, these parties will also work together to understand whether there are any planned-for-but-not-currently-open roles at the company that could be a good fit for the employee.
If a new role is identified, the Division Leader will work with the Manager to communicate the new opportunity to the employee and gauge interest.
In scenario 2 listed above, or if efforts to find a new role at the company are not fruitful in scenarios 1 and 3, the Manager and Division Leader will work together and with HR to follow the process detailed on the following slide.

Involuntary Termination
Manager

1. To prepare for day of termination, provide the following to HR:
Day and time of termination
Who will be executing the termination (minimum two Carnegie representatives must be present. HR representative will be one of the representatives).
Any additional/unique information specific to the situation HR should be privy to
Recommendations for severance if applicable.
Manager
2. If the departing employee is a manager, please notify HR of the new reporting structure for timesheet and expense report approvals.
Manager
3. On day of termination:
Coordinate with HR on timing. HR will work with HelpDesk to shut off all access during termination time*. Manager to follow with any additional access changes needed.
Complete the termination meeting quickly.
If located within a Carnegie office, walk employee out of office. No employees should return to desk without special exception. Their personal belongings will be ready for their departure.
Manager to notify the team of the change
Human Resources
4. HR will follow up with email to employee on separation agreement, final paycheck, and additional termination documents (benefits, unemployment, Insperity access, company equipment list).
Employee
5. Final severance payment if applicable will be paid upon receipt of signed separation agreement and return of all company property including computers, monitors, power cords, keys, etc. Remote employees will be provided shipping instructions from HR.
Manager
6. Instruct employee to contact HR with any additional questions. HR will manage all communication. If manager or employees receive communication from terminated employee, notify HR.
Human Resources
7. HR will remove from organizational chart.
Human Resources
8. HR will notify HelpDesk that all equipment has been received.
Approval of termination must be made by Divisional Leader and HR. Provide all information and documentation as soon as possible to review and prepare.
*Emails will be set to forward to manager unless otherwise determined. Asana tasks will be reassigned to manager unless otherwise stated by manager.

carnegiehighered.com
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!
We know it is! This is one of those guides that will never be finished. We'll always be adding content to better support you, but we still want to hear what you think!

Instructions to Session Hosts

Save: Please save a copy of this presentation to your desktop or your MyDrive.
Personalize: Edit slide #3 to include your name, photo, CarnegieChem persona, and personal/professional facts.
Review slides: Walk through each slide and read the speaker notes (where provided) to understand the context for the slide's content. These are not meant to be read word-for-word.
Avoid lingo: Remember to avoid acronyms and "lingo" as much as you can—both from within higher ed and Carnegie-specific. This is truly meant to be 101-level content. If you find yourself wanting to use a higher ed-specific term in your explanation of something, make sure you stop and explain the term as well.
Have fun: This is an onboarding session for new Carnegie employees (most, if not all, will have been with Carnegie for a month or less). Bring enthusiasm and energy!

Higher Ed 101
Carnegie Onboarding

[First Name]
+ [Title (role at Carnegie)]
+ [insert previous higher ed experience]
+ [TeamChem Persona here and update corresponding color circles below your image]

Your Host
INSERT YOUR PHOTO HERE

Carnegie's Mission
To create powerful connections between students and colleges through marketing and enrollment innovation.

agenda
today's
 Higher Ed Structure + Terms
 Higher Ed Macro Trends + Challenges
Carnegie + the Vendor Market
Appendix
+

Higher Education in the U.S. - Structure + Terms
1

5,916
TOTAL U.S. HIGHER ED INSTITUTIONS
1,892
PUBLIC SCHOOLS
Public schools are funded by local and state governments and usually offer lower tuition rates than private colleges, especially for students who are residents of the state where a college is located.

Private schools rely mainly on tuition, fees and private sources of funding. Private donations can sometimes provide generous financial aid packages for students.

For-profit schools are owned and operated by a private company or business. They are often managed by investors and they generate revenue that is used for non-educational purposes. For-profit institutions usually don't receive state or federal aid.

1,754
PRIVATE NONPROFIT SCHOOLS
Higher Education in the U.S.
2,270
PRIVATE FOR-PROFIT

SCHOOLS
NCES, 2021
Down from 7,021 in 2010-11
Control of Institutions

Institution Types
Structure + Terms

Institution Types
LIBERAL ARTS SCHOOLS
These schools generally emphasize small class sizes and a curriculum centered on the humanities, arts, social sciences, and natural sciences. Most are private and offer four-year programs that lead to a bachelor's degree.
UNIVERSITIES
These schools are often larger and offer more majors and degree options —bachelor's, master's and doctoral degrees—than colleges. Most universities contain several smaller colleges, such as colleges of liberal arts, engineering or health sciences.
+
+
+
+
COMMUNITY COLLEGES
These schools offer two-year associate degrees that prepare students to transfer to a four-year college to earn a bachelor's degree.
VOCATIONAL-TECHNICAL
AND CAREER COLLEGES
These schools offer specialized training in a particular industry or career. Possible programs of study include the culinary arts, firefighting, dental hygiene and medical-records technology.
ART SCHOOLS/CONSERVATORIES
These schools focus on the arts.
In addition to regular course work, these colleges provide training in areas such as photography, music, theater or fashion design. Most of these colleges offer associate or bachelor's degrees in the fine arts or a specialized field.
+
RELIGIOUS SCHOOLS
Some private colleges and universities are connected to a religious faith. The connection may be historic only, or it may affect day-to-day student life. Some require a faith

statement to attend.
+

Institution Types
HISTORICALLY BLACK COLLEGES AND UNIVERSITIES (HBCU)
These are schools who were established prior to 1964 and whose principal mission was, and is, the education of black American students. There are 107 colleges in the U.S. that are identified by the US Department of Education as HBCUs. Of those 107, three are currently closed. During the period of racial segregation in the U.S., the majority of American institutions of higher education served predominantly white students, and disqualified or limited black American enrollment.
HISPANIC-SERVING INSTITUTION (HSI)
These are schools with an undergraduate enrollment that is made up of at least 25 percent Hispanic students. This designation enables the school to receive grants from the U.S. Department of Education as well as support and acknowledgement from other associations, alliances, and organizations who seek to support Hispanic students.

+
+
+
ASIAN AMERICAN AND NATIVE AMERICAN PACIFIC ISLANDER -SERVING INSTITUTION (AANAPISI)
These are schools with an undergraduate enrollment that is made up of at least 10 percent Asian American and Native American Pacific Islander students. Additionally, at least half of the institution's degree-seeking students must be low-income. AANAPISI funding can be used to strengthen overall institutional capacity and as a pathway for additional federal and private resources to assist underserved communities.

Institution Types
WOMEN'S COLLEGES
These schools are undergraduate, bachelor's degree-granting institutions, often liberal arts colleges, whose student populations are composed exclusively or almost exclusively of women. Some women's colleges admit male students to their graduate schools or in smaller numbers to undergraduate programs, but all serve a primarily female student body. There are currently 26 active women's colleges in the U.S.
MEN'S COLLEGES
These schools are institutions that only admit male students. In the U.S., male-only undergraduate higher education was the norm until the 1960s.

The few remaining well-known men's colleges are traditional independent liberal arts colleges, though the majority are institutions of learning for those preparing for religious vocations.
There are three private, non-religious, four-year, all-male college institutions in the United States:
Wabash College,
Crawfordsville, Indiana
Hampden–Sydney College,
Hampden Sydney, Virginia
Morehouse College*,
Atlanta, Georgia

*Morehouse is also an HBCU. In 2020, Morehouse began admitting transgender men for the first time, becoming the first standalone all-male college in the U.S. to adopt a policy on transgender students.

+
+

Student Types
Structure + Terms

Student Types
UNDERGRADUATE
A student seeking an associate or bachelor's degree
"TRADITIONAL"
A student under 25 years old who enrolls directly from high school and attends full-time.
+
+
TRANSFER
Any student applying to an institution after accumulating at least 30 college credits.
+
+
+
GRADUATE
A student who has achieved a bachelor's degree and is pursuing a Master's or PhD in a specific field.
"NON-TRADITIONAL"

Typically, this refers to a student who is over 25 years old and/or who did not go to college immediately after high school. They could have work experience, military experience, taken a gap year, etc.
NON-DEGREE-SEEKING
A student enrolled in a course(s) for credit who is not working toward a degree or certificate.
+

Student Types
+
"FTIAC" = First Time In Any College
A student who has no prior postsecondary experience attending an institution for the first time at the undergraduate level. (FTIAC and "first time student" are used interchangeably.)
Other terms to know
+
First Generation "First Gen" Student
A student whose parents never attended college.
+
"Low SES" Student
A student whose parents have a low socioeconomic status.
+
"URM" Student
A student who identifies as an underrepresented minority.
+
"Legacy" Student
A student related to a family member who has attended a particular school.

Learning Modality
Structure + Terms

Learning Modality
ON CAMPUS
Traditional college experience; students live on campus or commute and attend classes in person.
HYBRID
This format splits time between on-campus and virtual environments, which may be synchronous or asynchronous:
Synchronous learning is instruction that occurs at the same time for everyone—the

instructor and the students.
Asynchronous learning allows students to view instructional materials at any time on their own.
+
+
ONLINE
All course work is delivered online. There are two approaches used to create/manage these courses:
Schools develop programs and courses internally
Schools partner with an Online Program Management (OPM) company that offers services to help colleges take their academic programs online. An OPM partnership can provide services like student recruitment, enrollment, market research, course design, student retention, and student placement.
Additionally, schools can also offer Massive Open Online Courses (MOOCs), which are free online courses available for anyone to enroll. MOOCs provide an affordable and flexible way to learn new skills, advance your career and deliver quality educational experiences at scale.
+

Degree Type
Structure + Terms

Degree Types
ASSOCIATE'S
Associate of Arts (A.A.)
Associate of Science (A.S.)
Associate of Applied Science (AAS)

BACHELOR'S
Bachelor of Arts (B.A.)
Bachelor of Science (B.S.)
Bachelor of Fine Arts (BFA)
Bachelor of Applied Science (BAS)
+
+
MASTER'S
Master of Arts (M.A.)

Master of Science (M.S.)
Master of Business Administration (MBA)
Master of Fine Arts (MFA)
+
DOCTORATE
Doctor of Philosophy (Ph.D.)
Juris Doctor (J.D.)
Doctor of Medicine (M.D.)
Doctor of Dental Surgery (DDS)
+
1.0 MILLION CONFERRED
EACH YEAR
2.1 MILLION
CONFERRED
EACH YEAR
866,900
CONFERRED
EACH YEAR
194,100
CONFERRED
EACH YEAR

Undergraduate Admissions Cycle
Structure + Terms

Undergraduate Admissions Cycle
PROSPECT
A person whose name and data has been purchased by a school but who has yet to express interest in the school.
INQUIRY
A person who has indicated that they are interested in learning more about a particular school (has submitted an inquiry form or “raised their hand” in some way).
APPLICANT
A person who has applied to a specific college or university.
A stealth applicant is someone who has not inquired or expressed interest before applying to the school.
ADMIT
A person who has applied to a specific college or university and has been granted

admission, should they choose to accept/deposit.
ENROLLED STUDENT!
A person who has notified a school of their decision to attend and paid a deposit.
The Path to Becoming a Student

Undergraduate Admissions Cycle
Sep
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Application Cycle
Fall Recruitment
Name Purchases
Fall Decisions Released
Yield
Summer Melt
What Admissions Staff are Doing
Counselors on the Road +
Application Review
Application review and holiday break
Jan. Term + Spring Transfer Decisions
Winter Events + Application Review + Decision Release
Yield
Summer Orientation +
Transfer Application Review +
Staff Retreats
External Events
Fall Open Houses for High School
Juniors and Seniors
Accepted Student Days + Spring Open Houses for High School Juniors

Marketing Efforts
Application Generation Communication +
Print Materials Distribution +
Advertising for Fall Events
Yield Communications + Advertising
Anti-Melt Communications +
Student Search Campaigns
Viewbooks Mailed + Student Search
Important Dates
Early Decision Deadlines
Regular Decision Deadlines
May 1st Deposit Deadline
Fiscal Year Ends
New Fiscal Year Begins
Classes Begin
Name Purchase: Schools purchase student names and associated data from ACT and The College Board (PSAT + SAT).
Student Search: Direct mail and email campaigns targeting prospects with the goal of eliciting a response (converting them to an inquiry).
Yield: The process of converting admitted students to enrolled students (convincing them to commit to your school and pay a deposit).
Summer Melt: Students who commit/deposit in the spring and change their minds over the summer.

What is this enrollment “funnel” I’ve been
hearing about?
A traditional approach to Student Search / recruitment where a school buys a large quantity of prospective student names and banks on meeting their enrollment goals by communicating a singular message to those names. The assumption is that the “right fit” students will request more information and continue on down the funnel as prompted by admissions staff.

PROSPECTS
(purchased names)
INQUIRIES
(“hand raisers”)
APPLICANTS

ADMITS

DEPOSITS
(committed)
ENROLLED
("butts in seats")

$10,000,000,000+
spent annually on recruiting students.
ADVERTISING: This can include expenses related to advertising on social media, search engines, or other online platforms, as well as print and broadcast advertising.
EVENTS: This can include expenses related to hosting open houses, college fairs, and other recruitment events, such as venue rental, promotional materials, and staffing costs.
LEAD GENERATION: This can include expenses related to lead generation campaigns, such as paid search ads or sponsored content, as well as the cost of purchasing leads from third-party providers.
STAFFING COSTS: This can include salaries and benefits for marketing and recruitment staff, as well as any outside consulting or agency fees.
RNL, 2020 Cost of Recruiting an Undergraduate Student Report,
https://files.eric.ed.gov/fulltext/ED608071.pdf

Structure + Terms
Leadership Structure

Leadership Structure
PROVOST
FINANCE
ATHLETICS
ENROLLMENT
MARKETING
INFORMATION TECHNOLOGY
STUDENT SUCCESS
ADVANCEMENT
Most cabinets have representation from the following areas, including distinct operating budgets:
Finance
Enrollment

Marketing
Student Affairs/Success
Advancement
Athletics
Information Technology
Faculty (Provost)

PRESIDENT

Higher Education in the U.S. - Landscape
2

Macro Trends + Challenges
Landscape

yesterday
THE GOOD ‘OLE DAYS
(growth)

1
today
MARKET SHARE BATTLE
(demand compression)
Deteriorating Market Conditions
In the last decade, Higher Education has transitioned from an industry experiencing growth at all levels to a market share battle.
PUBLIC UNIVERSITY PRIVATIZATION
As a result of the loss of state funding, many public universities are adopting strategies previously only employed by the best private universities, such as aggressively recruiting out-of-state students, utilizing complex scholarships and financial aid leveraging models, developing stronger fundraising support through foundations, and rapidly responding to market needs. The impact of the CARES Act, compounded by the forecasted economic destruction caused by COVID-19, may result in higher need profiles. Universities will need to lead with strategic awareness and become increasingly Sensitive to what regions were hardest hit and variances in regional recovery speeds.

3,600k

3,500k
3,400k
3,300k
3,200k
3,100k
3,000k
2,900k
2,800k
2,700k
2,600k

2001
2004
2007
2010
2013
2016
2019
2022
2025
2028
2031
2034

2026 DEMOGRAPHIC CLIFF
Deteriorating Market Conditions
1
The number of kids born between 2008 and 2011 plummeted dramatically. Therefore, in 2026, the number of high school graduates will peak, which will result in an “enrollment cliff,” posing a major financial threat to institutions who rely on tuition as a primary source of revenue.

PUBLIC + PRIVATE
PUBLIC
OVERALL HIGH SCHOOL GRADUATE TRENDS (NATIONWIDE)
Growing market deterioration has been observed nationwide on the back of shifting demographic trends such as declining birth rates and a drop in international student enrollment. This impact, while most pronounced in the Northeast and Midwest regions,

affects the entire landscape. Closures, mergers, and acquisitions will only increase as this trend makes itself felt. This market shift demands changes to positioning, sales, and marketing efforts, even at institutions with excellent industry status. Within these new norms, more aggressive and heavily funded marketing efforts, competitive evaluation and action, new market exploration, and differentiation tactics will drive many institutional marketing operations.

Deteriorating Market Conditions
Blue: increase in the number of students attending regional four-year colleges and universities between 2012 and 2029.

Red: the drop in students will exceed 15%.
1
Over the four years following the “enrollment cliff,”
the number of 18-year-olds will decrease by 15%.

Growing market deterioration has been observed nationwide on the back of shifting demographic trends such as declining birth rates and a drop in international student enrollment. This impact, while most pronounced in the Northeast and Midwest regions, affects the entire landscape. Closures, mergers, and acquisitions will only increase as this trend makes itself felt. This market shift demands changes to positioning, sales, and marketing efforts, even at institutions with excellent industry status. Within these new norms, more aggressive and heavily funded marketing efforts, competitive evaluation and action, new market exploration, and differentiation tactics will drive many institutional marketing operations.

Deteriorating Market Conditions
1
Institutions are beginning to incorporate student retention/success initiatives into their enrollment planning.
“student retention” = the process of keeping students enrolled
The ultimate metric for student retention is the school’s graduation rate. (Student success is more complex, however.)
Strategies that impact student retention and success:
financial aid
student orientation
academic advising
payment plans

internal communication, such as registration outreach

RETENTION AS A FOCUS OF ENROLLMENT MANAGEMENT

Given the well-documented and widely recognized demographic shifts that currently (or will soon) impact many institutions throughout the US, enrollment leaders are beginning to incorporate retention and student success strategies into institutional goals with more frequency in an effort to insulate and offset increased competition at the top of the enrollment ecosystem. The lines between recruitment and retention are blurring as universities place priority on retaining current students to maintain headcount and offset shrinking incoming classes.

To remain competitive and excel in this changing landscape, institutions should look to incorporate student success initiatives into their enrollment planning. Such initiatives might include first-year seminars that act as early alert systems to identify at-risk students within the first three weeks of school; leveraging the institution's Customer Relationship Management (CRM) program for both prospective and current student populations; implementing peer mentor programs; and identifying high failure rate courses and working with academic advisors to ensure at-risk students are adequately guided and supported in their pursuit of such courses.

Population Demographic Shifts

2

Growth is expected in domestic minority populations—Hispanic and Asian/Pacific Islanders.

Emerging diversity trends require clear enrollment strategies for acceptance and inclusion.

Inclusion is more important than ever for students across demographics.

In 2025, 54% of college-eligible students will be non-white.

HIGH SCHOOL GRADUATING CLASS BY RACE/ETHNICITY

WICHE Dec. 2020

Nationally, demand is expected to fall sharply for Caucasian and African American, non-Hispanic college-bound students through 2029. While overall demand will fall, growth is expected in domestic minority populations, such as Hispanic and Asian/Pacific Islanders. It is important that marketing communications efforts reflect more cultural sensitivities spanning racial populations. In addition, the college-bound wealth profile will decline, increasing pressure on the affordability of the college investment.

DIVERSITY MUST BE MET WITH INCLUSIVITY

Emerging diversity trends within the market population need to be met with clear enrollment strategies for acceptance and inclusion. Such inclusivity needs to consider income and need, growth in non-traditional enrollees ranging from increased commuter populations to adult students, and increases with historically underrepresented students of color and first-generation college students. Although diversity can be measured through reported enrollment counts, inclusion reflects the institutional, cultural commitment towards equity. Inclusion is becoming a high value for students across demographics and will need to be clearly communicated and demonstrated throughout the enrollment ecosystem.

Effects of Covid-19

3

Decline in name availability

(PSAT, SAT, ACT, etc.)

Information seeking:

More consistently seeking info on digital platforms

Text messaging has increased in acceptance

Students are more attuned to campus action plans, health services, and school climate

Health-related safety is now a core issue for some students

The percentage of students only considering an in-person education has plummeted to 13% from a previous 27%

The average age of online student prospects has dropped from 39 to 31

Racial minority students are now more interested in an online degree (38% to 42%)

Many trends seen during the height of COVID-19 have leveled off. However, when combined with other industry factors, a new landscape for student search and application behaviors has emerged.

Prospective students leverage more sources to actively seek out information and have migrated toward digital offerings with greater regularity. Active information seeking on an institution's website has increased, along with more nuanced Google search terms used.

While email remains the highest-scored channel for receiving direct information from a school, text messaging has increased in acceptance, especially among the youngest prospects. However, direct phone calls are not appreciated, and video calls have returned to pre-COVID levels of distaste.

In addition to these changes in information seeking, application behaviors are shifting. The average number of applications per traditional undergraduate prospect has increased from approximately seven in 2019 to nearly 10 in 2022. Some of this is connected to lasting anxiety over COVID, though much can also be attributed to the increase in students and institutions using the Common App to quickly apply to many schools. Despite this change in application behavior, actual acceptance rates are down slightly, meaning that the overall number of schools students have to choose from after acceptances are released has increased more slowly, from approximately five accepted opportunities in 2019 to six in 2022.

Finally, student attitudes toward COVID have only slightly changed ongoing perceptions of college as a whole. Students are more attuned to campus action plans, health services, and school climate. Related to this, more students consider health services as part of "campus safety" than before the pandemic. Prior, students saw campus safety as primarily an issue of physical violence, sexual violence, and petty theft. Health-related safety is now a core issue for some students, especially those with compromised immune systems.

Effects of Covid-19

3

Staff morale decline

(furloughs, layoffs, budget cuts)

The "Great Resignation"

Rise in micro-credentialing + certificates

2022 Employee Retention Study

College and University Professional Association for Human Resources

REASONS EMPLOYEES ARE SEEKING NEW OPPORTUNITIES

VALUE OF SHORT COURSES FOR STUDENTS

Pay/Salary Increase

Opportunity to Work Remotely

Flexible Schedule

Promotion or More Responsibility

A New Challenge

Working with Different People

Relocation

Better Benefits

A Raise in My Salary

A Promotion at My Job

Entry into a New Industry

Feeling More Confident Among Peers

A New Job or Career Path

THE GREAT RESIGNATION

In November 2021, the country's resignation rate was the highest it has been in 20 years;

however, as of March 2022, nearly three-quarters of those that resigned are now working again. Notably, those younger than 30 were the largest group to resign. An aging workforce among higher education institutions will mean that attracting staff within this age group will be critical. Retention will also be crucial due to the importance of relationship building in enrollment roles, particularly admissions. Universities were thrust into a period of innovation during the COVID-19 pandemic, pushing leaders to consider and accept new ideas that they previously shied away from. This approach to student recruitment and retention must now be applied to the institutional workforce to create environments that meet the expectations of an evolving workforce that has demonstrated it isn't afraid to make a change.

RISE IN MICROCREDENTIALING + CERTIFICATES

A third of people who lost their jobs in the pandemic, or worried they would, report that they need more education to get new jobs. The Great Resignation has led millions to look for new skills to enable a significant career change. However, the majority of these adult learners need a more immediate solution than a four-year degree. As a result, momentum for short-term microcredentials and certificates has increased, offering a nimble and expedient option to fill the skills gap in a way that shows employers exactly what skills potential employees have acquired. Additionally, many students like the "early win" of obtaining a microcredential, motivating them to continue their education in stacking the credentials and ultimately earning an associate's or bachelor's degree. As the need grows, more schools are looking at adding these types of programs, and they are looking to partner with and educate employers who also benefit from upskilling their current employees to meet emergent technology and business needs.

Test-optional

4

Covid-19 pressed many institutions to temporarily move to a "test-optional" status, but for many, this will become permanent.

"test-optional" = the school allows all applicants to decide for themselves whether to submit test scores

"Admissions offices increasingly recognize that test requirements, given their negative disparate impact on Black and Latinx applicants, are 'race-conscious' factors, which can create unfair barriers to access higher education. They also know that standardized exams are, at best, weak predictors of academic success and largely unrelated to college-ready skills and knowledge."

Harry Feder,

FairTest Executive Director

83%
OF FOUR-YEAR U.S. SCHOOLS ARE TEST-OPTIONAL
FairTest, 2023
the National Center for Fair & Open Testing
78%
OF FOUR-YEAR U.S. SCHOOLS HAVE CONFIRMED TEST-OPTIONAL THROUGH FALL 2024
Test-optional is likely here to stay, at least for some institutions. Recent research found that 68% of the institutions that implemented a temporary test-optional policy during the onset of COVID plan to make that a permanent fixture of their admissions operation. In place of testing, institutions are thinking creatively about application review guidelines and closely monitoring retention trends to determine the impacts of the last few years of test-optional enrollment on their overall goals. It will also affect the need for additional support services (academic advisors, tutoring, etc.) and distribution of financial aid. As perceptions among high school students regarding testing continue to shift with industry trends, schools will find it more and more difficult to justify the use of standardized tests as a foundational component of their review criteria.

Supreme Court Decisions
5
Affirmative action in higher education admissions policies
Over the last 25 years, schools have been able to use race and ethnicity as one of the many factors considered in enrollment decisions.
The Supreme Court ruled that race could no longer be considered in the admissions process.
As schools try to navigate strategic plans that have diversity, equity, and inclusion goals, admissions staff are wondering how to meet their goals without considering race:
What data should be used and when?
Does this impact financial aid?
Some schools are replacing considerations of race and ethnicity with considerations of socio-economic status, zip code, and/or high school.
What now?
June 2023
Historical Context
Carnegie is doing it’s due diligence in making sure we stay up to date with these trends

Gen Z
Landscape

Characteristics of Gen Z

Characteristics of Gen Z
Born between about

1997

and

2010s
Born between about

1980

and

1996
Since 2018, every student of traditional college undergraduate age has belonged to Gen Z. Until those born in the 2010s (Generation Alpha) reaches college age, higher education marketing will need to focus heavily on the truths and needs of Gen Z. Gen Z has been characterized as “app natives” who are realistic, driven, hyper-custom, and capable of blending the physical and digital realms. Despite their technological savviness, members of Gen Z value authentic relationships.
A GENERATION OF REALISTS
Most of Gen Z has seen greater financial struggles than previous generations, which has made them highly pragmatic in decision-making and more likely to focus acutely on the cost of a college education and the importance and potential of scholarships. Although affordability is top of mind, many may react negatively to “affordability messaging.” In the wake of the events of 2020, financial security remains a concern with Gen Z, along with having a successful career. Such realism also manifests in a widely held belief of this cohort that higher education is but one method of securing the tools necessary for employment. Therefore, it remains important to clearly articulate the value an institution provides students, employers, regions, and the world—particularly traditional values such

as a broad-based or liberal arts education and career outcomes.
A GENERATION OF ACHIEVERS
The mantra “work smarter, not harder” is close to the heart of Gen Z. They are driven to work with rigor, centering their efforts on achievement, but will only accept recognition when warranted. While they share a similar attachment to their individual social perception on digital and social media platforms, they adeptly curate their online presence as a result of their drive to outpace others in their space and field. Although Gen Z possesses a love of experiences, their drive also manifests in an astute level of pragmatism.

Characteristics of Gen Z
Online courses and traditional class spaces are interchangeable in value
Institutions must be technologically sophisticated and investing in stable, emerging technologies
Multiple forms of technology might be used simultaneously for personal and educational tasks
Serving an ad = easy
Catching their attention = difficult
LIVING LIFE BETWEEN PHYSICAL & DIGITAL
Gen Z thrives in the liminal space between both the physical and digital modalities. Although digital moments prove a cornerstone in Gen Z communications, they equally appreciate physical experiences. This means that online courses are considered interchangeable with traditional class spaces. Members of Gen Z might value company but can experience it through either a digital or physical space. As such, technologically sophisticated institutions will be far more likely to catch the eye of Gen Z.

SUPPORT IN MANAGING TECHNOLOGY
It is not uncommon for Gen Zers to use multiple forms of technology simultaneously to accomplish both personal and educational tasks. This means that getting an advertisement in front of them is easier than ever, but catching their attention, especially to move them toward important conversions or enrollment next steps, is increasingly more challenging. Implementing intuitive processes throughout the enrollment process and investing in stable and emerging technologies will be necessary to keep Gen Zers engaged and moving forward toward enrollment.

Characteristics of Gen Z
Hyper-customization is expected in marketing and recruitment strategies as well as

academic offerings

GEN Z EXPECTS HYPER-CUSTOMIZATION

Having always lived in a world where one size never fits all, Gen Z is particularly fond of customizable experiences, platforms, and vessels for expression. When job opportunities failed to live up to this degree of customization, Gen Z started their own businesses to make things happen in their preferred image. Both customizable courses and degree tracks will prove highly important in attracting these students. The rigidity and non-flexibility of concepts like general education requirements are largely maligned with observed needs for customizability.

Our Value Proposition

Higher Education Marketing and Enrollment Strategy

The power of
human connection.

Carnegie is the future of higher education marketing and enrollment strategy, and has been since 1985. We connect colleges with students through the power of human connection by measuring and then marketing to a student's unique behaviors and motivators. This leads to action, enrollment, retention, and lasting affinity.

SOLUTIONS

Brand + Activation

Enrollment Pipeline + Management

Market Intelligence

Marketing Strategy + Execution

Operations + Optimization

Our 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.

ADMISSIONS
Motivated by recruiting the class
Primary owners of CRM (Slate)
Only outward facing role
Responsible for comm-flow, application process, and yield
Typically led by VP, Enrollment Management or Chief Enrollment Officer
MARKETING
Motivated by building and maintaining brand reputation
Primary owners of brand standards
Manages Public Relations function
Typically oversees digital marketing
Manages website
Services the entire campus
Typically led by VP, Marketing or
Chief Marketing Officer
Carnegie + the Higher Ed Vendor Market

Our Primary Institutional Sponsors
+
+
Note: While these trends are often the case, many things vary from institution to institution. As a best practice, marketing and enrollment departments who work closely together to recruit the next class are most successful (the marketing team is often involved in the beginning stages of recruitment work—clarifying and differentiating the brand for enrollment's sake).
The best case scenario is when these two entities work together and work in lock step. Most schools don't do this well—maybe 25% do. Often, they operate in silos and work blindly of one another which makes our work challenging.
Slate can start to help bridge the gap between them.

With evolving market share dynamics impacting entire industries, brands have placed more attention than ever on reputation development and management tactics. The move towards centralized operations has improved the capability of many departments to tackle the challenges of enterprise-level identity, reputation, and awareness in ways that were not possible even a decade ago.

CENTRALIZING OPERATIONS & PLANNING
Given the increasing demands of the modern marketing operation, the trend for several years has been to break up the siloed and heavily decentralized structures of the past in favor of a larger, team-structured central marketing operation. Critically important in this move is to fully integrate functions to improve capability, cross-train to drive performance, and, most importantly, create an overall shift from reactive communications to proactive strategic communications. To achieve this, university Chief Marketing Officers (CMO) have driven the importance of annual planning and marketing plan performance measures and goals. This effort has improved departmental reputation with key stakeholder groups, enabled workload leveling, and reduced peak workloads throughout the academic year.
THE NEW CHARTER OF THE CHIEF MARKETING / BRAND / COMMUNICATIONS OFFICER
The role of the CMO is facing either an expanded charter or interaction with a new set of colleagues. Although some sectors were early adopters of this structure and may be experimenting with new bleeding-edge roles and positions, those institutions that recently expanded the CMO's oversight into brand and communications are embracing an era of Chief Brand Officers (CBO) and Chief Communications Officers (CCO). Some institutions' decision to recruit to fill CBO and CCO positions, in addition to the CMO position, has resulted in a new power trio. All of these roles benefit from a direct reporting relationship to top leadership in order to balance political pressures and improve direct communication

on reputation issues, but they must also be in lock-step alignment with sales or recruitment leadership to ensure successful and sustainable revenue generation.

Carnegie + the Higher Ed Vendor Market
Pipeline Building
Enrollment Strategy
Application Generation
Data Systems &
Web Development
Financial Aid Leveraging + Analytics
Yield

Carnegie + the Higher Ed Vendor Market
The Big Three

Carnegie + the Higher Ed Vendor Market
Other Market Players

Carnegie + the Higher Ed Vendor Market
Carnegie is Always Pushing the Industry Forward
+
Authentic Storytelling vs Factland
We've been emphasizing the power of human connection for over a decade, using our proprietary personality assessment methodologies to anchor brand differentiation and student recruitment messaging.
+
The Approach to Student Search
Rather than a "spray and pray" high volume approach to name purchasing and comm-flow strategy, we've been advising our clients to be targeted from the beginning—only pursuing students whose demographic and psychographic characteristics would be a good fit for the school and segmenting our messaging accordingly
"comm-flow" = the series of communications (emails, postcards, texts, booklets) sent to prospects, inquiries, applicants, and admits trying to convince them to take the next step towards enrollment.
Market cultivation versus direct marketing
Data ownership and transparency

+

Predictive Modeling in an Enrollment "Ecosystem"

We've challenged old "funnel"-based enrollment models and called attention to the new reality that students decide when and how they will engage with an institution (an "ecosystem" mindset). We've built tools and data models to track attribution and affinity in this new reality that are more powerful than anything the industry has seen before.

AUTHENTICITY DRIVES AFFINITY

Younger generations respond best to ads that do not feel like ads but instead communicate an authentic story. Coupling the fact that 86% of consumers report that authenticity is important when deciding which brands to support with the reality that 95% of purchase decisions take place on a subconscious level, driven by emotions more than logic, universities are investing resources in authentic storytelling that prioritizes personal communications, user-generated content, and other "storyliving" efforts that aim to connect with their audience on a personal and emotional level to meet the market's expectations and achieve better results.

THE APPROACH TO STUDENT SEARCH

Market cultivation /brand marketing is designed to build trust in, and awareness of, your brand - and is mostly unmeasurable. Direct marketing is designed to drive a specific action (clicks, impressions, purchases) and is 100% measurable.

PREDICTIVE MODELING IN AN ENROLLMENT ECOSYSTEM

Many institutions have experienced the erosion of reliability in the old predictive yield modeling approach that assumes an appropriate number of prospects will become applicants, admits, and then deposits. Instead, students are applying to more schools, and yield rates are becoming increasingly unpredictable. One factor causing this is the reality that students decide when and how they will engage rather than the institution, which was the assumption previous models were predicated on. Now, multiple ports of entry that were previously untapped or inaccessible are an institution's primary tool in determining attribution and building and evaluating affinity to predict whether they will meet their goals and determine where to place more resources. One example of new and alternative ways to engage includes virtual visits. An on-campus visit was once one of the best indicators of yield behavior for admitted students. Now, expectations related to virtual visit options mean institutions must consider how this shift may affect the weight of this engagement opportunity in their predictions.

Appendix

Other Higher Education Terms
FINANCE
FAFSA: Free Application for Federal Student Aid
PPY: Prior Prior Year, the ability to submit financials from the prior year during your FAFSA application.

TESTING
SAT: Standardized Aptitude Test
ACT: American College Testing
GMAT: Graduate Management Admission Test
GRE: Graduate Record Examination
LSAT: Law School Admission Test

APPLICATIONS
ED: Early Decision Deadline (binding)
EA: Early Action Deadline (non-binding)
RD: Regular Decision Application Deadline

ASSOCIATIONS + ORGANIZATIONS
Encoura: an educational data science and research organization; owned by ACT
College Board: a non-profit organization that connects students to college success and opportunity Each year, CB helps students prepare for college through college readiness/success programs —including the SAT, the Advanced Placement Program, and BigFuture
NACAC: National Association for College Admission Counseling
NAGAP: The Association for Graduate Enrollment Management (formerly National Association of Graduate Admissions Professionals)

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 needed.

carnegiehighered.com

Reimbursements Policy + Resource Guide
Expense Management

Carnegie's policy, technology, and support for expenses and reimbursements.

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table of
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Policy Details
1

A Note About Our Reimbursement 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.

The objectives of this policy are:
1.) To provide employees with a uniform method of reporting and accounting.
2.) To set standards identifying acceptable expenses that the company will reimburse.

Please remember, no policy can replace judgment and common sense in the spending, reporting, and controlling of expenses.

Responsibility and authority to implement and enforce the policy is placed with each manager. This responsibility includes effective communication of the policy and any related procedures to all affected personnel. The Finance Department is responsible for establishing the forms, procedures, and controls necessary for proper administration. The COO has final authority in interpreting the provisions of this policy.

Reimbursement Policy
Once you’ve been given permission to submit an expense for reimbursement, follow the guidelines below to ensure you’re doing so within company policy.
+
Travel-related Reimbursement
+
Non-travel-related Reimbursement
All receipts need to be detailed and itemized. If you receive a receipt from a vendor that does not include individual costs per item, please ask them for an itemized receipt. You should submit a receipt via Certify with a photo of all relevant receipts.
Gratuity should be given at 15% maximum.
Internet is only reimbursable when purchased during business travel.
Office equipment, computer supplies, and subscriptions should not be purchased by the employee but should be requested from helpdesk@carnegiehighered.com
All other purchases (non-travel and non-IT-related) should be discussed and approved by the Division Leader prior to purchase.
All travel-related reimbursement policies (as well as best practices and Carnegie travel norms can be found in our Travel Policy + Resource Guide.

Getting Started with Certify
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7
All Carnegie-approved expenses are to be tracked in the Certify platform. 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.
Kris Peterson will send you an invitation to set up your Certify account. Before you travel or make a purchase for the first time, please complete the steps below.
Add Your Personal Email Address
On your account homepage click your name, then click “Account Settings.” Add your personal email address so that if you are emailed a receipt, rather than receiving one in person, you can forward that receipt to receipts@certify.com and it will be automatically added to your account whether you send the receipt from your work or personal email address.
Setting up Your Account
+
Set up Direct Deposit
Set up your Direct Deposit by connecting Certify with your bank account information:
On your account homepage click your name, then click “Account Settings.”
On the “My Account page “under the Account Settings tab, next to Direct Deposit Account, select Add Account Information.
On the Direct Deposit Account Information page, complete all fields.

Download the App
Please download the Certify app on your mobile device and sign in.

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The easiest way to stay on top of receipts while traveling is to add them from the mobile app right away, each time you receive a receipt. Whether you’re submitting expenses from travel or for another reason, there are two primary steps to the process with several ways to do both.

Add Receipts
There are three ways to add receipts:
Add receipts within the app from your mobile device (select either “Add Receipt” or “Add Expense”)
Forward email receipts to receipts@certify.com (after you’ve added all relevant email addresses to your Certify account—see previous slide)
Upload receipts on desktop. Log in and select “Add Receipts” from the menu on the left.

Then Create an Expense Report
There are two ways to create an expense report:
All receipts will collect in your Certify “Wallet.” Once you are done adding receipts, navigate to “Wallet” on a desktop, check the box next to relevant expenses, and click the “Add to Report” button.
Alternatively, you can select “Auto Expense Report” from your mobile app and choose from the options provided to collect relevant expenses in an Expense Report.
Order of Operations
1
2

Add Receipts
2

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Uploading Receipts on the App
(recommended method)
Log in to your Certify app on your phone.
Click “Add Receipt”
Select the resolution if you are taking a photo, or choose Gallery if you already have a photo saved.
You may be able to select “Autofill” to auto-populate fields with information from your receipt.
Manually enter the remaining information.
If this expense is billable, select the client from the “billto” dropdown menu and select “yes” for billable and reimbursable.
Save your receipt.
To view your saved receipts, you can click on “Receipts in Certify” on the main menu of the home page.

Receipts in the Mobile App

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Uploading Receipts in the Browser
Sign in to your Certify account on your browser.
Navigate to “Add Receipts” by selecting it from the left side bar or from the “Add Receipts” section. Upload the photo of your receipt.
Added receipts can be found in your wallet, which you can access from the left side bar.
Receipts in the Browser
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Legibility
Make sure all receipts are legible. If the information (including price) cannot be read – it cannot be reimbursed.

Itemization
For all transactions – you must include the detailed listing receipt, plus the receipt that you sign with the total (if at a restaurant). If the location/vendor does not provide a detailed listing receipt, please add this information manually by specifying what you ate, linking to the menu, etc. For items such as flights, please make sure that your name and flight dates appear on the receipt submitted.
Receipt Guidelines
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No Receipt
If you are someplace like a gas station and cannot get a receipt, take a photo of the price on the pump - then attach this photo with the matching online credit card transaction to the report.

Alcoholic Beverages
Please remember that at no time can alcoholic beverages be submitted as COGS. If your receipt includes alcohol, this amount must be entered into Certify as a separate transaction that is just Meals - Self, not COGS meals.

Please keep the following guidelines in mind when adding receipts to Certify.

Create an Expense Report
3

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From within the Certify browser, in the left hand navigation click “New Expense Report”
From there enter a name for the report, dates and a description. If billable to the client make sure to check off “billable to client”. Once the fields are filled in, click “Next”.

Creating a New Report
1
2

15
Within the expense report, towards the second half of the page, you have an option to add expenses.

Start by typing the type of expense and completing details (date, vendor name, amount, etc.).
You have the option to select receipt - all receipts will be populated on the right side of the screen.
Select the correct receipt, and it will now be tied to the transaction. If the company paid for this expense, change the last entry to “Company Paid - Do not reimburse me”

Adding Expenses Within a Report

Expense Codes
Travel (non-client work)
Travel (client work)
There are three meal options based on the situation:
Meals-Self (just you)
Meals-Staff (you and co-workers)
Meals-Client/Potential Client (you and non-Carnegie guests such as a client or a prospective client)
All travel-related expenses for non-client work, such as a team off-site, use the naming convention “Travel: [category]”.
Travel: Airfare

Travel: Car Rental
Etc.
Meals (non-client work)
All travel-related expenses for client work, use the naming convention “Client Expense: [category]”

Client Expense: Airfare
Client Expense: Car Rental
Client Expense: Meals
Etc.
Business Forms
Client Expense: Mat/Supply
Computer Supplies
Meals-Self
Postage
Travel: Car Rental
Business Gifts/Entertainment
Client Expense: Meals
Conv/Trade Show
Meals-Staff Only
Seminar/Classes
Travel: Gas
Client Expense: Airfare
Client Expense: Mileage
Copy Expense
Membership Dues
Shipping/Overnight
Travel: Ground Transport
Client Expense: Car Rental
Client Expense: Parking
Employee Relations
Miscellaneous
Subscriptions
Travel: Lodging
Client Expense: Gas
Client Expense: Printing
Internet
Office Equipment

TeamCare
Travel: Mileage
Client Expense: Ground Transport
Client Expense: Travel Other
Marketing
Office Supplies
Tips
Travel: Other
Client Expense: Lodging
Computer Software
Meals-Client/Potential Client
Photography
Travel: Airfare
Travel: Parking
Travel: Tolls
Expense Code List*
*List may update from time-to-time. If you are unsure, ask ops@carnegiehighered.com.
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The most commonly used expense codes are summarized immediately below while the full list of expense codes can be found in the table.
These should be updated to relevant resources - if you want to mention them. Otherwise you can delete this slide or use the format for contact information - names, emails, social and CarnegieHigherEd.com

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If you are submitting mileage for reimbursement, select the mileage expenses category, enter the starting address, ending address, then select Map It. This will calculate your mileage and add a map to the expense.

Mileage Expenses

Submitting the Report
4

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Once all receipts have been entered, at the top of the page you have the option to Submit

Report for Approval. From within the expense report, click “Submit for Approval”, then review the details check the box “I certify this expense report is true and accurate” and click “Submit”.

Submitting the Report

Expense Approval Process
5

Expense Report Journey
Employee Submits
Non Client Bill Back Expenses
Manager Approves
Division Leader Approves
Division Operations Approval
Client Bill Back Expenses
Division Operations Approval
Payment
Expenses are reimbursed every other Friday (same day as payroll). Employees must submit by end of day Friday prior to payment for managers, division leads, and division operations to approve for final submission by Monday afternoon of pay week.
Reimbursement Timeline
+

Approval Process
Approval 1:
Manager Review
Approval 2:
Division Lead
Final review for receipt acceptance, coding accuracy, and general policy respect.

CollegeXpress:	Kris
Creative	Lisa
Digital:	Kris
RMS:	Lisa
Slate:	Diane
Student Search	Diane
Web:	Jess H.
CLARUS:	Kris

CS/BD/Mktg:	Taylor
Administration:	Kris

General approval of overall expense and confirmation that the expense is within the expected role and budget.
Review of policy expectations (ie. over spending, etc.)
Oversight of correct expense coding and classification.
Receipts are present for all expenses.
Approval 3:
Division Ops
Overall P/L review and awareness.

Finance:	Ryan
Ops/HR/IT:	Meghan D.
CollegeXpress:	Megan G.
Creative	Volt
Digital:	Alexa
RMS:	Vigg
Slate:	Megan R.
Web:	Bill
CLARUS:	Katie S.
Client Success:	Eric
Bus.Dev/Mktg:	Mark

Final approval by finance and submission for payment.
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+
Below is the approval process for all non-client bill back expenses.

Resources
Kris Peterson:
kpeterson@carnegiehighered.com

Lisa Mathias:
lmathias@carnegiehighered.com

Diane McLaughlin:
dmclaughlin@carnegiehighered.com

Jess Howland:
jhowland@carnegiehighered.com

Taylor Mims:
tmims@carnegiehighered.com

Meghan Dalesandro:
mjd@carnegiehighered.com
Contacts
Certify Login

Certify User Guide

Certify Mobile App

Travel Policy

Quick Links
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carnegiehighered.com
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!

Slack Resource Guide
Internal Communication

1
Carnegie's instant messaging platform, used for collaborative work discussions, team announcements, direct messages, and just-for-funsies gifs and conversations.
November 2023

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Purpose
Settings
Status
Channels
Threads
Integrations
Helpful Tips
+
2

Slack
Internal Instant Messaging System
Slack is the primary method of daily communications for one-on-one conversations, casual/fun messages with coworkers, non-Asana-task related discussions, and team reminders.
Slack messages disappear after a set amount of time so you should not put anything in Slack that you want a record of later.

Within Slack you can message via different options: direct individual messages, within channels (chat rooms), and direct group messages (a select group of team members)

Slack huddles can be used when you want to have a non-scheduled discussion with someone, after confirming they are available.

If you and another 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 and/or Tinman campaign.
3
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Slack Settings
Update your profile by clicking on your name in upper right corner and then selecting “edit profile”

Profile Settings
Required: Full name, Display Name (Full Name - this is what used in tagged name) Title, Name pronunciation, Time zone
Optional (but encouraged): Picture

Contact Information
Required: Email
Optional: Phone

About Me
Optional: Preferred Pronouns,
Role Description

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Please make sure to keep your Slack status updated!
You can update your status to indicate availability to team members. Your status should be active when you're working and available to chat. If you're out of the office please remember to update your status to "away"

Icons can be used as a fun way to let colleagues know what you're up to as well as to indicate when you may not be available to chat (ex. you've stepped away for lunch)

You can download the slack app on your phone to stay connected on-the-go, but please don't feel obligated to respond outside of working hours!

Slack Status
5

If you do not want notifications from general/fun threads, you can silence them by right-clicking and selecting "Mute Channel."

Connect with your manager to see additional divisional/team based channels to join

Contractors should be Invited to individual channels only and not the full Carnegie workspace
Slack Channels
6
There are two primary channels for reaching out to the company (all new employees are

automatically added):
#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.
Additional Carnegie company-wide recommended channels:
#affirmations
The #affirmations channel is a great way to give a shout out to a team member.
#gratitude
A place to share and celebrate gratefulness!
+
+

Slack - Just For Fun
7
Feel free to browse and join other channels based on your interests (we have a lot!) or create a new channel

+
#carnegie-book-chat
#post-a-cat
#foodies
#swifties
#dadjokes
#carnegiekids
#dog-parents
#minute-workout
#plantpeople
#travel
#small-businesses

Click All channels at the top of your left sidebar. If you don't see this option, click More to find it. Browse the list of public channels in your workspace, or use the search bar to search by channel name or description. Select a channel from the list to view it.
#traderjoesfans
#crosswordcorner

#big-ten
#disneychannel
#philanthropy
#wordle
#in-need-of-a-podcast
#cdbachnation
#great-british-bake-off
#sustainability-tips
+

Slack - Regional Channels
8
Carnegie is largely remote, but that doesn't mean we can't mix and mingle from time to time, be that in-person or virtually! To do that, we're introducing a number of new regional channels for you and your crew to jump into and find ways to connect, to share what's going on, and more. Join as/if you wish to!

+
#carnegie-carolinas (NC, SC)
#carnegie-deepsouth (AL, FL, GA, LA, MS, TX)
#carnegie-dmv (DC, DE, MD, VA
#carnegie-greatlakes (IL, IN, MI, MN, OH, WI)
#carnegie-greatplains (AR, IA, KS, MO, NE, ND, OK, SD)
#carnegie-midatlantic (NJ, NY, PA)
#carnegie-newengland (CT, ME, MA, NH, RI, VT)
#carnegie-pnw (AK, ID, MT, OR, WA)
#carnegie-southwest (AZ, CO, NM, NV, UT, WY)
#carnegie-uppersouth (KY, TN, WV)
#carnegie-westcoast (CA, HI)

Slack - Threads
Threads help you have organized discussions around a specific message and are a good way to have multiple conversations going within a channel at the same time

Best used for short side conversations

Responding as a thread keeps all communication within that comment together

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Indicates a thread was started.
Click on “2 replies” to view the thread.

Slack - Integrations
Integrate slack with other common tools:
Google Drive
Create new docs, reply to comments, grant access to files, get updates on comment notifications right within Slack
Google Calendar or Outlook Calendar
If this is turned on, Slack will automatically show an “In a meeting” status whenever you’re in a scheduled meeting
Harvest
Allows you to easily log time when using Slack. Just remember to stop the timer!
Asana
Don’t miss an Asana notification with this integration, You can also take action from within Slack.
Zoom
Start or join a zoom meeting by using commands within slack ex. /zoom (starts meeting)

10
View the full Carnegie Slack Integration Directory
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Best Practices
Create a Channel
Creating a Channel is preferred over a group direct message when discussing an on-going topic. Finding a channel is easier to navigate back to vs having a one-off group direct message and trying to remember who all was in the group. If you’re the owner of the

channel you can archive the channel when it is no longer needed

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Leave a Channel
You can leave a channel when it is no longer relevant to you to keep your slack channel list clean and manageable

Send Messages at a Later Time
Type the message, then choose the arrow next to the send message to select a custom time. Choose a standard time, or type the time in yourself. Once you have a message scheduled, you can see it under Scheduled. This allows you to edit the message, cancel it, reschedule it, or send immediately.

You can also see the scheduled message flag at the bottom of the conversation that it is scheduled to send to:

Note - you can't schedule a message to respond within a thread

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+
Best Practices

Helpful Tips
More Actions
Select a message and click more actions (three dots) to:
Mark message as unread
Be reminded about message later (you can select when later is)
Pin message to channel
Star Channels
Channels can be starred to easily find your most important channels
Group Channels

Channels can be grouped by theme and create as many groups as you want. For example, I have a group for "Teams" and another for "Internal Projects" another for "Client Projects" and another for "Fun"

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“MORE ACTIONS”
GROUP CHANNELS

Notify All
Use @channel to trigger a desktop or mobile notification for all members of the channel, whether their availability is set to active or away and use @here to notify the active members of a channel
Set Preferred Emojis
Customize your one click emojis to your favorite top three to make reacting to messages even easier! Go to Preferences, Messages & media, Custom and select your preferred emoji’s
Use Bookmarks
Use bookmarks to organize links for threads/channels
Link to a Thread
Copy a link to a specific thread for easy reference. Click three dots - copy link and paste wherever you’d like

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Helpful Tips
SET PREFERRED EMOJIS
LINK TO A THREAD

Do Not Disturb (DND)

All notifications and mentions will be paused while this setting is on. Members will see a DND icon next to your name, when sending a direct message you can override to notify about an urgent message once a day.

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+

Add your own Emoji!
Want to add an emoji to Carnegie library?

For other questions check out Slack's help center
Helpful Tips
+

Question answered
helpful hint: If you post a question in a channel and a colleague posts the answer within the thread conversation, add the green checkmark emoji to the original question. This way other folks will know the issue has been resolved.

16
+
Helpful Tips

carnegiehighered.com
17
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!

Tinman - Clients
Budget and Order Management

1

Carnegie’s custom-built software for tracking proposals requests, budgets, contracts, active client orders, and invoice schedules and approvals.

2

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3

Login
Tinman

Note: Everyone has access to Tinman!

First off, make sure you’ve connected to the VPN (OpenVPN Connect is the name of the application). For instructions on how to connect, please see IT Support Info.

Once connected to VPN, navigate to http://tinman.carnegie.llc/admin and log in using the same credentials you use to log in to your Gmail & VPN.

You’ll be brought to a page that says “My Items” and will contain quick links to any Tinman orders, campaigns, contracts, proposal requests, and error alerts to which you’re connected.

Logging into Tinman
How to Sign in

5

Client Information
Tinman

Locating Client Information

To find a client’s landing page, click “Clients” from the top navigation

Then, type the school name in “Sage ID/Name” field.
Press enter
All results with that name will appear in a table below.

All client/prospective client schools have their own landing page in Tinman with a record of work that we’ve proposed and/or are work that we are currently completing for them or have completed for them in the past.

Client Landing Page
Overview
Header
Links
Orders
Contracts
Budget Boxes
Proposal Requests
People
Groups
Connectors
Each client landing page contains the same nine sections.
The following slides detail each of these sections, what information they contain, and how to navigate to the information you need within each.

Client Landing Page
Looker Studio Digital paid performance report
CollegeXpress school profile page
Kiwi portal used by the CX team
View all
“Op notes”
New “Op note” used by Digital, CLARUS, SEO
Logo
Institution Name
Location of School
Sage ID (used for billing)
Client Code
Pricing Model (digital)
Billing details/invoices for the client
Edit client details

Delete client
Client's media plan
View all client check-in notes (used for internal notes at the campaign level)
Health/ Status of relationship
Client Success Leader - owner of account
Header Details

Client Landing Page
Links Section Details
Edit Link
The Account Management team creates links to reference for each active client. There are a variety of link types—a sample of which can be seen in the screenshot below.
Delete Link

Client Landing Page
Order Section Details
Each Order in Tinman represents active work for a client. There is, at minimum, one Order for every Contract. Sometimes there are two or three Orders per Contract. In all cases the # for all Orders and the corresponding Contract should match.
Change number of Orders shown at one time
Create a new Order
Search for specific Order nickname
Add new Campaign
Edit the Order
Delete the Order
Section navigation
Column sort

Client Landing Page
Contract Section Details
Change number of Contracts shown at one time
Create a new Contract
Search for specific Contract nickname
View the Contract
Edit the Contract
Delete the Contract
Section navigation
Column sort

Each client contract we sign can be found in the client's Contracts section, regardless of the contract format. If the contract status says "unsigned," it is out for signature. If the status says "signed," the contract has recently been signed, but not yet created as an active Order in Tinman. If the status says "executed," an Order with the same number as the contract can be found in Tinman.

Client Landing Page
Budget Box Section Details
Edit Budget Box
Delete Budget Box
View
Budget Box
View
Summary
The scope and pricing for a proposed scope of work is referred to as a "Budget Box." These dynamic tables of information are created and managed by the Business Development team and Subject Matter Experts. Behind every proposal provided to a client is a Budget Box that includes line items for each service included. Unless you know you have permission to edit a Budget Box, please use the "View Summary" button to see what a Budget Box includes.
Section navigation
Change number of Budget Boxes shown at one time
Column sort
Search for specific Budget Box
nickname

Client Landing Page
Proposal Request Section Details
The Sales Lead submits proposal requests, and the Business Development and SME team(s) put together the proposed strategies and pricing
View Proposal Request
Create a new Proposal Request
Change number of Proposal Requests shown at one time
Column sort
Filter Proposal Requests by calendar year
Section navigation
Search for specific Proposal Request
nickname

Client Landing Page
People Section Details
Copy Contact
Delete Contact
Edit Contact
View Contact
The People listed here are client contacts we have on record in Tinman. Primarily the authorizing and billing contacts are included in the Tinman database.
Change number of People shown at one time
Section navigation
Create a new
Client Contact
Search for a specific person
Column sort

Client Landing Page
Group Section Details
Groups are used by the Digital, CLARUS and SEO (Web) teams for reporting. A grouping is a way to categorize campaigns into different segmentations to group and restrict reporting filtering and views.
View
Group
Edit
Group
Delete
Group
Digital Report Links
Change number of Groups shown at one time
Column sort
Create New Group
Search for existing Group
Section navigation

Client Landing Page
Connector Details
Connectors are used to set up the API connections with the digital platforms, used by the Digital and CLARUS teams.

Connector Pairing
KPIs for Connector
View Connector
Edit Connector
Create a new connector by selecting from down down
Platform Results
Conector Totals
Section navigation
Change number of Connectors shown at one time
Column sort

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Proposal Request > Active Order Workflow
Tinman

Workflow Within Tinman
Contract
When the client is ready to buy, the Sales Lead submits the Contract Request form and provides the link to the final Tinman Budget Box. The Operations team creates a Tinman Contract and sends to the Sales Lead to return to the client for signature.
If any terms/conditions negotiation needs to occur this happens at this stage.
Proposal Request
Budget Box
Order
After the Sales Lead submits the fully executed signed contract to contracts@, the Account Management team turns the Tinman contract into an active Tinman Order, with rows (campaigns) for each of the services sold.
Each month, the assigned AM/PM(s) review each line item and update the status as needed. This process is how we determine how much revenue to recognize each month.
The Sales Lead has a conversation with a prospective/current client about a new opportunity and creates a new Proposal Request (PR) for the Business Development and/or SME team(s).
Linked to the Tinman Proposal Request, the Business Development team (and/or SMEs) create a Tinman Budget Box that line items out the proposed services to be included within the proposal, including the scope and cost(s) for each.
This is revised iteratively until the client decides whether they will buy/not buy.
(All proposal slide decks are developed outside of Tinman and managed through Asana.)

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Glossary
Tinman

Glossary of Terms
Client - The institution we’re working with
Order - The work to be executed for set time period, can range from a few months to annual, depending on the scope
Campaign - Each line item of work to be executed (service level)
Contract - The signed order for a client
Connector - The connection point between the client and digital platform
Division - The different areas of our company. The listings can be found under reports “Divisions”
Product - The type of work being executed. Existing products can be found Under Reports - Products
Service - Products with Vendor (who’s executing the work) attached. Also found under Reports - Services
PR/Proposal Requests - A form submitted by the sales team including the details needed for the teams to put together pricing/proposal to send to the client. Found under PR header.
Parent Group - The highest grouping level of multiple product groups. Example Paid digital is a parent group, Social media is the product group and facebook is one of the products. Full listing here.
Product Groups - A way to group products together for reporting. Example all social products (Facebook, LinkedIn, TikTok etc) are categorized under the product group of Social Media.
Auto Actuals - The automated process of flipping a forecast spend to an actual (what we are actually charging the client)
Group & Subgroup - Used by the digital division to be able to segment Looker Reports by different groupings or further subgroupings for sharing and filtering reports
Model - Used by the digital division to indicate pricing model of CPM, Markup or Management Fee
Sage ID - Sage is our Billing system. ID is a field to match the two systems.
SCID - School identifier
Client Code - An abbreviation for the school name used for naming conventions in other platforms (Harvest etc)
Enrollment Size - Enrollment size of the institution categorized into Small, Medium & Large. Small under 2500), Medium(2500-7500), Large 7500+)
Cost Multiplier - The markup between cost & budget. What we spend in the platform vs

what client gets charged.
CPM - Cost Per Thousand. Used by the digital team to show expected impressions.
G/L Account - General Ledger Account # (which division the work is associated with). Each division has their own G/L Account number.
Billing Code - A way to get more granular with billing details with an G/L code
Vendor - Who is executing the actual work. Most of the time this will be “Carnegie”

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Issues, Enhancements & Change Management
Tinman

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There is a Software Access, Requests, Issues & Enhancement Form (Tip: Bookmark this!) that you can fill out with your Tinman idea and/or issue. Once the form is submitted it will create an Asana card to which you’ll be added as a follower. The Ops team will review the card, get clarification, or collect more information before discerning whether it can be added to the queue for work.

Changes are typically pushed live in bulk every few weeks and detailed for the Tinman Power User Group via the Tinman Updates changelog.Those team members are responsible for informing their teams about new updates.
Tinman Issue or Enhancement Idea?

carnegiehighered.com
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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!

Zoom Resource Guide
Virtual Meetings & Phone System
1
Carnegie’s video conferencing and phone system that lets you connect anywhere, anytime. Zoom is used internally for all 1:1 calls, team meetings and client calls.

2
contents
table of

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Getting Started
Zoom Account Types, Your Zoom Settings, Scheduling a Meeting, Joining a Meeting, In-Meeting Etiquette, Meeting Controls, Recording Meetings, Accessibility,
Advanced Features + Integrations
Zoom & Google Calendar Integration, Zoom & Slack Integration, Using Zoom within Slack, Breakout Rooms, Zoom Polls, Zoom Q&A Sessions, AI Companion,
Just for Fun
Outside a Meeting
Troubleshooting Common Issues, Zoom Phone

Getting Started
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Zoom Account Types
At Carnegie, we employ various categories of Zoom accounts to accommodate the diverse needs of our team members.
If you have questions about your account type, please connect with your manager.
Basic Account
This account type provides the ability to host unlimited one-on-one meetings and 40-minute group meetings.
This is the standard account for a Carnegie employee.
Licensed Account
This account includes all basic functionality as well as unlimited duration for group meetings. This type of account is allocated to roles that are primarily responsible for scheduling and hosting meetings. Please note that all upgrade requests need to be approved by a divisional leader.
Licensed Accounts w/Phone
For individuals requiring a dedicated phone number for making and receiving calls with clients, we offer a Zoom phone line. Please talk to your manager if you are interested in this option.

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PRO TIP: If you have a basic account and you surpass the 40-minute length of the call but

need to finish your conversation, simply call back in on the same Zoom link and your timer will restart.

Scheduling a Meeting (via Google Calendar)

Instructions

1. Connect Zoom and Google Calendar: See this slide with instructions on integrating your Zoom and Google Calendar.
2. Create a new meeting: Click the “Create” button from within the calendar interface. A form will appear, prompting you to enter meeting details.

Add Title: Enter a title or description for your meeting. For internal meetings please use the following naming conventions:

Internal meetings - “INT | [Meeting Subject]”

Client meetings - “Carnegie | [Client Code] - [Meeting Subject]”

Date & Time: Set the date and time for your meeting, as well as the time zone. Click “Does not repeat” to revise if this meeting is recurring.

Add Guests: Type in the email addresses for those who are invited to the meeting.

Description: If you’re scheduling the meeting you are responsible for providing the agenda to attendees. Provide a link to the agenda or type in the agenda content in the description.

3. Make it a Zoom Meeting! Click the blue button and you’ll see all of the zoom meeting details will automatically populate into your calendar invite. Often, your event window will close itself after you’ve selected this option, automatically saving.

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From calendar event, click “Make it a Zoom Meeting”

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Zoom meeting details populate in invite

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Scheduling a Meeting (via Zoom)

Instructions

1. Sign in to Your Zoom Account: Open the Zoom app on your computer or visit the Zoom website and use SSO option. Then, find the blue button that says “Schedule”—this looks slightly different if you’re in the app versus in a browser.

3. Fill in Meeting Details: A form will appear, prompting you to enter meeting details.
Topic: Enter a title or description for your meeting. For internal meetings please use the following naming conventions:
Internal meetings - “INT | [Meeting Subject]”
Client meetings - “Carnegie | [Client Code] - [Meeting Subject]”
Date & Time: Set the date and time for your meeting, as well as the time zone. Check the box if this meeting is recurring.
Description: Adding a description is only available when scheduling a meeting through a browser (not the desktop app). However, if you’re scheduling the meeting you are responsible for providing the agenda to attendees. Provide a link to the agenda or type in the agenda content in the description. (If you’re creating the meeting via the desktop app, you’ll need to circle back and add a description once the meeting is created.)
Attendees: Type in the email addresses for those who are invited to the meeting.
Meeting ID: You can choose to generate automatically or use your Personal Meeting ID.
Security: If you’re inviting anyone outside Carnegie, please check the box next to “Waiting Room” (and ensure that your Waiting Room is set up—see this slide).
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Scheduling a Meeting (via Zoom, continued)

Video: Please default to “off” for both the Host and Participant so that no one is caught off guard. Everyone can then turn their videos on once they’ve collected themselves and are ready for the meeting.
Audio: Please default to “Telephone and Computer Audio” so that both options are provided to attendees.
Calendar: Choose the type of calendar that you use. Most will default to “Google Calendar.”
Advanced Options: Please check the box next to “Mute participants upon entry” so that the meeting is not disrupted if someone joins from a noisy location. You might also check the box next to “Allow participants to join anytime” so that your Carnegie colleagues are not impeded from joining and chatting with each other before you join.
Alternative Hosts: If you’re scheduling a large internal meeting or client-facing meeting, it’s best practice to always nominate an alternative host, in case you have any access troubles. You can add as many as you’d like. Once added, those people will get notified that they’ve been added as an alternative host to the meeting.
5. Save the Meeting: Once you've filled in all the necessary details and invited participants, click the "Save" or "Schedule" button. This will create the meeting and send invitations to the participants if you've entered their email addresses.

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Your Zoom Settings

In Zoom, you have the power to tailor your meeting settings for a more seamless experience. There are many settings you can customize. A few of our favorites include:

1. Waiting Room: Send meeting participants outside of Carnegie into a waiting room, and customize the waiting room experience.
2. Allow participants to join before Host: Allow participants to join before you do and determine how far in advance they can join before the meeting starts. (If your waiting room is turned on, only those from Carnegie will be able to join before you)

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Joining a Meeting

Locating the Meeting Link:

You'll receive an invitation email or a link from the meeting host. Click on the meeting link provided in the meeting description.

The meeting will automatically open in the Zoom application.

If the meeting doesn't open automatically, click on the Zoom icon on your desktop and select "Join a Meeting."

Enter the Meeting ID or Personal Link Name (if provided) from the invitation. If required, enter the meeting passcode.

Click the "Join" button to enter the meeting.

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PRO TIP: Make sure you're signed into your Carnegie account, or you'll be placed in a waiting room!

Configure Audio and Video

Before entering the meeting, you'll have the option to configure your audio and video settings.

Choose your audio and video preferences

(e.g., mute/unmute, start/stop video).

Click "Join with Computer Audio" to connect your microphone and speakers.

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Meeting Controls

Use the on-screen controls to manage your audio and video, raise your hand, chat, and more.

AUDIO AND VIDEO CONTROLS

Click the microphone icon to mute or unmute your audio. You can also press and hold the spacebar as a shortcut to temporarily unmute while holding it down. Click the video camera icon to start or stop your video feed. To access advanced audio and video settings, click the "^" arrow next to the microphone or camera icon.

PARTICIPANTS

Click the "Participants" icon to see the list of all meeting participants and, if you are the host, to let people into the meeting who are outside the organization.

MEETING CHAT

Click the chat icon to open the chat panel.

You can send messages to all participants or privately to a specific person.

SHARE SCREEN

Click the "Share Screen" button to share your screen with others. You can choose to share your entire screen, a specific application, or a whiteboard. You can also choose to share your sound.

RECORD

Click the Record button both to start and end recordings. For more standard recording practices, see this slide.

REACTIONS

(If enabled by host)

Click the "Reactions" button to raise your hand or send emojis like clapping, thumbs up, and more to express your reactions during the meeting.

MORE OPTIONS

Click the three dots (More Options) icon for additional features such as captions, and other meeting settings allowed by the host.

LEAVE OR END THE MEETING

Leave Meeting: To leave the meeting, click the "Leave Meeting" button, typically located in the lower right corner. You can choose to leave with or without ending the meeting for others.

End Meeting for All (Host Only):

If you're the meeting host, you'll have the option to "End Meeting" to conclude the session for all participants.

VIEW

Speaker View: Click the "Speaker View" button to focus on the person currently speaking.

Gallery View: Click the "Gallery View" button to see multiple participants on the screen simultaneously.

Recording Meetings

Get Ready to Record
Once you're in the meeting, check out the control bar at the bottom. You'll spot the "Record" button with a friendly red dot. Click on it when you're ready to start recording and choose “Record to this Computer” or “Record to the Cloud.” If you choose the later, your recording will be saved to Carnegie’s corporate Zoom account and your recording will be available via URL and passcode to reference later.
Shine on Camera
Now that you're recording, be your fabulous self! Say hi, wave, share your screen, and chat away. Zoom's recording will capture all the magic.
Wrap it Up
When you're done rocking the meeting, click the "Stop Recording" button (it's the same one where you started). Your video is now safely stored on your device. The recording will also stop automatically once you have closed out of the meeting.
Share
Upload your recording to Google Drive and share with the appropriate individuals.
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Record meetings within Zoom.

In-Meeting Etiquette
Embracing a professional and upbeat approach to video conferencing not only conveys respect for your colleagues but also ensures productive and pleasant virtual interactions. Here are some guidelines to enhance your video conferencing etiquette:

Camera On
Present Your Best Self: When in a video conference, remember to turn your camera on to engage more effectively with your colleagues. It's important to maintain a professional appearance during the call. Use an appropriate background or employ the background blur option for a polished and distraction-free environment. This adds a layer of professionalism to your virtual presence, making your interactions more engaging and visually appealing. While our default is camera-on, please feel empowered to keep 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.

Stay Engaged

Active Participation: Actively participating in the meeting involves both listening attentively and contributing when relevant. Maintain your focus on the discussion at hand, avoiding multitasking or giving the impression of disinterest. Your engagement fuels productive dialogues and fosters an atmosphere of collaboration.

Be Punctual

Respect for Time: Being punctual is a sign of respect for your colleagues and the meeting's objectives. It's advisable to join the meeting on time or a few minutes early. Punctuality not only sets a positive tone for the session but also ensures the uninterrupted flow of the meeting. This approach demonstrates professionalism and consideration for your team's time and commitments.

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Accessibility

Captions

You can edit your settings to always turn on captions if they are allowed by the meeting host.

When creating a meeting, you can control whether attendees can use captions.

You can turn on captions while in-meeting by choosing “More”. If the captions option is missing, the host has not enabled it.

Advanced Features + Integrations

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Zoom & Google Cal Integration

Here are some of the key benefits:

Effortless Scheduling: Schedule Zoom meetings and webinars right from your Google Calendar interface. No need to switch between apps - simply set the date and time within your calendar, and the integration handles the rest.

Real-Time Updates: Any changes you make to your Zoom meetings, such as rescheduling or cancellations, are instantly reflected in your Google Calendar, ensuring everyone is on the same page.

Join with a Single Click: Easily join Zoom meetings directly from your Google Calendar event with a single click, reducing the hassle of searching for meeting links or access codes.

Automated Reminders: Google Calendar sends you timely reminders for your scheduled

Zoom meetings, helping you stay organized and punctual.
Access Meeting Details: All the important information, such as meeting links, passcodes, and descriptions, are readily available within your Google Calendar event, making it a breeze to access and share with participants.
Experience seamless scheduling and enhanced productivity with the integration of Zoom and Google Calendar. This powerful collaboration streamlines the coordination of your virtual meetings and appointments.
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Integration Options
Google Chrome Extension
Go to the Google Calendar Chrome Extension webpage
Choose “Install”

Google Workspace Marketplace
Sign out of all Google accounts except for your @carnegiehighered.com or @claruscoporation.com account
Search for “Zoom” in the Google Workspace Marketplace
Click on the Zoom icon, then “Install”
Click “Continue”
Select the Google account you want to add Zoom into
Allow the permissions

Zoom & Slack Integration
The integration of Zoom and Slack offers a powerful solution for streamlining communication and collaboration in a professional and upbeat manner. This synergy enhances the efficiency of your teamwork and elevates your virtual interactions.
Setting Up the Integration
Navigate to the apps section of Slack
(bottom of the Home tab) and click “add apps”.
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You’ll then see the Zoom configuration button; when you click that button, you’ll be brought to the slack app directory.

Click “Open in Slack” and then “Open Slack” on the following screen that appears.
The app will be added to Slack and will appear in the apps section.
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Using Zoom within Slack

Scheduling and Joining Meetings

Scheduling from Slack: Schedule Zoom meetings directly within Slack using commands such as "/zoom" or "/meet." This convenient feature eliminates the need to switch between platforms, simplifying your workflow.

Joining Meetings: Easily join scheduled meetings with a simple click, thanks to the automatic meeting links provided in your Slack channels. This seamless process saves time and minimizes disruptions.

Meeting Management

Meeting Reminders: Slack notifications can serve as effective reminders for upcoming meetings, ensuring that your team members are punctual and well-prepared.

Collaboration and Sharing: Share meeting recordings, documents, or notes within your Slack channels. This collaborative environment encourages the exchange of ideas and resources.

Feedback and Interaction: Encourage participant interaction by enabling features like Zoom polls and Q&A directly within your Slack channels. This boosts engagement and yields valuable insights.

Breakout Rooms

Breakout rooms are a valuable feature that empowers you to enhance the productivity of your Zoom meetings by segmenting participants into smaller groups for in-depth discussions, collaborative efforts, or engaging activities. These rooms offer an organized way to foster interaction and brainstorming, making your meetings more dynamic.

2. Specify number of rooms: A window will open, allowing you to specify the number of rooms and whether participants should be automatically or manually assigned to their respective rooms. After configuring the breakout rooms, click "Create."

3. Review assignments: A new window will show you who is in each room. You will have the opportunity to manually move people around as desired, regardless of how you initially assigned rooms. When you’re satisfied, click the "Open All Rooms" button to start the breakout sessions.

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Setting Up Breakout Rooms

Select from the toolbar: Start your Zoom meeting. Click on the "Breakout Rooms" button in the Zoom toolbar.

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Breakout Rooms
Pre-Assigning Breakout Rooms
Edit Meeting: Sign into the Zoom web app. Either create a new meeting or edit one that already exists. Scroll down to Options and click “Show”. Toggle Breakout Room pre-assign.
Breakout room assignment: Choose “+Create Rooms” to add people to each room. You can also rename the rooms as it makes sense for your meeting.
Pre-populated: After rooms have been pre-assigned, the assignments will prepopulate in-meeting when you choose to send attendees to their breakouts.
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Breakout Rooms
Managing Breakout Rooms
While in a breakout room, participants can interact, share content, and collaborate.
As the host, you can join any breakout room by clicking on "Join" next to a room's name in the breakout rooms panel.
You can broadcast messages to all rooms or send messages to individual rooms.
Under the options menu, set a timer to automatically bring everyone back to the main session when the breakout session ends.
Close breakout rooms to end the sessions.
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Zoom Polls
The integration of polls into Zoom offers a powerful tool for acquiring immediate feedback and assessing participant comprehension during your meetings or webinars. Elevate your virtual interactions with this feature that encourages active engagement and informed decision-making.
LICENSED ACCOUNTS ONLY
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Create + Utilize Polls
Create a poll before a meeting
Create a poll during a meeting
Launch a poll during a meeting
Tips
You can create multiple poll questions for different parts of your meeting or webinar.
Participants will see the poll question on their screens and can select their answers.

As the host, you can see the results in real-time.
As the host, you can choose to share the poll results with participants if desired.

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Zoom Q&A Sessions
Zoom's Q&A feature is a valuable asset that empowers participants to actively participate by posing questions and receiving immediate responses during meetings and webinars. This functionality enriches your virtual interactions, fostering an environment of engagement and interactivity.
Enabling Q&A
Create the Zoom meeting or webinar directly through Zoom. Scroll to the bottom and choose Advanced Options. Q&A will be one of the options to select.

Start your Zoom meeting or webinar.
Click on "Q&A" in the Zoom toolbar.
Participants can click "Q&A" to ask questions.

The host and co-hosts can answer questions in real-time.
Promote participants to panelists while creating a webinar invite to allow them to answer question.
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Toggle the option to allow questions to be commented on in a meeting by participants so they can help answer questions if needed.
If needed, you can enable or disable the Q&A feature during the meeting. You can also choose whether questions are anonymous or not.

Zoom Q&A Sessions Cont.
You can choose to type an answer which will move the question to the Answered tab once sent.
Questions are organized in the Q&A panel, where you can answer them, mark them as answered, or dismiss them.
Choosing to answer a question live will let the asker know you plan to answer verbally on

your meeting/webinar.
Delete or dismiss questions you no longer want to appear.
Dismiss use case: Someone asks about technical difficulties they’re having. You or someone else can answer, then dismiss the question since it’s irrelevant to your call.
Delete use case: Someone asks an inappropriate question.

AI Companion

In September 2023, Zoom released its AI Companion (for licensed Zoom users). Zoom’s AI Companion records and transcribes meetings (similar to the capabilities of Fathom, an AI call transcription tool we’ve been using since early summer 2023). When using this feature, the meeting summaries will be emailed to the host of the meeting and can also be found within zoom under “Meeting Summary with AI companion”.
Our Recommendation
At this moment, our recommendation leans toward using Fathom rather than Zoom's AI Companion. Nevertheless, we are actively monitoring the ongoing enhancements to the AI Companion to assess whether it aligns with our complete notetaking requirements.

Just For Fun
Immersive View
Zoom's "Immersive View" is a feature that allows you to create more engaging and interactive virtual meeting environments by placing participants in a shared background, such as a virtual meeting room or a custom backdrop

Filters & Effects
Zoom filters and effects are an excellent way to add a touch of creativity and personalization to your virtual meetings. Whether you want to look your best, express your mood, or simply have some fun, Zoom's filters and effects make it easy to do so. Experiment with these features to make your Zoom meetings more engaging and enjoyable for both you and your participants. Click into Access video settings - once in a meeting, click the video camera icon in the bottom left of your screen. Click on “Background & Filters”
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Your friendly Ops team testing out the Immersive View
Shortcuts

Zoom offers keyboard shortcuts, such as ALT+Y to raise/lower your hand. Check out the full list of keyboard shortcuts here

Outside a Meeting

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Troubleshooting Common Issues

Check Your Internet Connection: A stable and strong internet connection is crucial for good video and audio quality. Consider using a wired connection if possible.

Close Background Applications: Applications or downloads running in the background can consume bandwidth. Close unnecessary apps.

Adjust Video Settings: In Zoom, navigate to "Video Settings" and ensure your camera and microphone are selected correctly. You can also lower video quality to save bandwidth.

Select the Right Audio Device: In the Zoom settings, check that your microphone and speakers are correctly selected.

Update Zoom: Ensure you have the latest version of Zoom installed, as updates often contain bug fixes.

Restart Zoom: Sometimes restarting Zoom resolves audio issues.

Try these first:

If issues still persist…

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Contact helpdesk@carnegiehighered.com

Please take/send screenshots of the issues/errors you're seeing so that our helpdesk team is better able to assist you.

Zoom Phone

Set up Zoom Phone

If you need to use a phone number aside from your personal one for work, connect with your manager about getting a Zoom Phone line. This feature is not automatically available with your Zoom subscription, even with a licensed account.

Log in

Open the Zoom app and log in with your Zoom account credentials. If you're using the Zoom mobile app, you can access Zoom Phone features by clicking on the "Phone" tab or icon.

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Make a Call
To make a call with Zoom Phone:
In the Zoom app, click the "Dial" or "Call" button.
Enter the phone number you want to call.
Click the call button (usually a phone icon).

Receive a Call
When someone calls your Zoom Phone number:
If you're logged into Zoom, you'll receive an incoming call notification. Click to answer the call.
If you have the Zoom mobile app, your device may ring, and you can answer the call like a regular phone call.

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Additional Resources
Zoom Learning Center - Learn anytime, anywhere, and expand your product knowledge. This is also a great resource for your end users!
Zoom Community - Get involved, become a leader, and connect with other Zoom users and customers.
Zoom Customer Success Forum - Connect with other customers, find upcoming events, ask questions, find answers, and connect with our Customer Success team!
Zoom Support - Find answers to your product questions in our many articles and training materials, or contact the support team for technical assistance.
Webinars - Attend webinars to learn about best practices and get the latest information about the Zoom platform.
Billing support and payment - Support for all Zoom billing and invoice matters.

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!

Parental Leave Policy Info Sheet

The Carnegie Parental Leave Policy is comprised of two types of paid leave:

1. Paid Birth and Recovery Leave
2. Paid Parental Leave

Carnegie's Parental Leave Policy is 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 here are some FAQs regarding the plan.

What is Paid Birth and Recovery Leave (PBRL)?

This policy is provided to the birthing parent to allow for the medical recovery of giving birth. For up to 6 weeks immediately following the birth of the child, the employee will, in combination with state disability programs and short-term disability, be paid up to 100% of their regular salary.

What is Paid Parental Leave?

This policy is provided to all parents, including birthing mothers, spouses, domestic partners, and adopting parents. The plan allows for up to 6 weeks of consecutive time off to allow for caring for the child, transitioning to parenthood, and taking care of anything related to the addition of a child into the household. In the case of birthing mothers, this will immediately follow the Paid Birth and Recovery Leave for a total of up to 12 weeks of PBRL + Paid Parental Leave. This leave will run concurrently with any state program available and pay, in combination with state-received funds, up to 100% of the new parent's regular salary during the term. Please note, the employee shall use two weeks (10 days) of vacation days during the final two weeks of their Paid Parental Leave.

The policy language and details are quite complicated; can you provide the quick version?

In short, birthing parents will receive up to 6 weeks of Paid Birth and Recovery Leave and up to 6 weeks of Paid Parental Leave for a total of up to 12 weeks of combined pay. All other parents (spouses/domestic partners/adopting parents) will receive up to 6 weeks of Paid Parental Leave for a total of up to 6 weeks of combined pay.

What do you mean by "combined pay"?
Because Carnegie funds other programs such as short-term disability and taxes related to state programs, those funds available will be used first in determining your total payment. For example, if your salary is $500 per week and you are the birthing parent in a state with a state program, the payments you receive will be:

1. State program payment: $100
2. Short-term disability payment: $200
3. Balance paid by Carnegie: $200

The total of these payments would net to $500 per week, making the employee "whole" during their leave.

When should I tell HR or my manager about my anticipated leave?
Although it is helpful for planning purposes, the timing of your news should be when you are ready. Notifying HR will be confidential and no other employee, including your manager, will be given this information until you are ready to share. As a general rule, the policy requires 30 days' advance notice or as reasonably possible of your intention to take leave under this policy. Your manager and the HR team will work closely with you throughout the process.

What am I responsible for prior to starting my leave?
You are fully responsible for filing all short-term disability and state program paperwork. These programs all run concurrently and must be fully filed in order to receive your leave payments. The payments you receive from Carnegie will be determined after these amounts are confirmed, as the Carnegie payment will "top off" any other program payments you receive. HR can provide you with information for short-term disability (in the case of birthing parents) as well as any state programs for which you may qualify. HR is not able to file for these programs on your behalf but can provide links and general information.

How do I know if there is an additional program in my state?
If your state offers a parental leave program, you are likely currently paying taxes into that program. Every state is different; therefore, the best way to know if there are additional programs and what that means for you is to talk to HR.

Is there a sheet that describes exactly my situation and program?
Unfortunately, no. Because every case is unique, we will handle your case as such. Therefore, it’s important to connect with HR and give as much information as you are comfortable with so we can provide next steps and requirements. The company/HR is not able to do this without your contribution, filing, and support, but we commit to being a helpful resource.

Policy Date February 15, 2023

PTO Policy Info Sheet
The Carnegie PTO Policy is comprised of two components:
1. Unlimited Vacation
2. Sick Time

At Carnegie, we take pride in our employees’ incredible work ethic, and we want to reward and recognize that by offering an Unlimited Vacation policy. We have adopted this policy because it embraces two key parts of our company culture: trust in each other and promotion of a healthy lifestyle. We believe that in order to do your best work, you should get the time off you need for rest, rejuvenation, and relaxation. This policy is also based on a mutual trust between you, your team, your manager, and the company as a whole. The specific policy details can be found in the handbook, but here are some FAQs regarding the plan.

What is Unlimited Vacation?
Carnegie’s Unlimited Vacation 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.

What is 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.

Why do we have Sick Time if vacation is unlimited?

Two reasons: (1) To ensure we're meeting all state requirements for sick allotment (as a standard, that is 40 hours for all employees, but it may vary based on state laws) and (2) to make sure employees are taking non-Sick Time throughout the year. 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 do I request time off?
Using the TimeStar system, log in via computer or the mobile app. Select the dates and hours you are requesting and the reason for your time off (choose "Pay Type" designated as Vacation, Sick, etc.), then press submit. This will send a notification to your manager to review, approve, and/or discuss. Ideally, all requests will be submitted with at least two weeks' notice—the sooner you request, the better for planning and organizational purposes—but we understand that last-minute stuff comes up.

What about other time off for things like jury duty, bereavement, or volunteer time?
In order to have the best view of time, we want to be sure we're using all time-off types in the system when possible; when you request time off in Insperity, there are "Pay Type" options called Bereave, Jury, VolunteerTime, and more. Using the proper label helps your manager understand your time off request and make a plan. Your attention to this is appreciated and does not impact your ability to take time off.

What time increments should I submit for?
Employees classified as "exempt" may take time off in one-hour (1-hour) increments (or as outlined by state or local laws). In other words, you should not request 3.123 hours off, rather plan and request the time in rounded one hour increments. Part-time and non-exempt employees should record their absences in exact time increments to the quarter hour (e.g., 1.5 hours, 6 hours, 2.75 hours). The goal is to log the time as accurately as possible.

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.

What if I’m nervous about requesting time off or feel unsure about what is right?
Talk to your manager! They will help you navigate it. If you feel like you need another resource, you can always contact HR to chat it through. We will support you and help navigate any worries you have to ensure you’re taking the time off you need.

How will my manager determine if they’ll approve my request or not?
Your manager will consider several factors in each request, including deadlines, projects, client needs, and team coverage. That said, if your request is timely, reasonable, respectful, and considerate, the likelihood of acceptance is very high. If there is any concern, your manager will discuss it with you and make a plan.

Does this Unlimited Vacation policy impact half-day Summer Fridays?
No! We are happy to confirm that Summer Fridays are a continued benefit for Carnegie employees. Summer Fridays are the closure of the Carnegie offices at 1:00 pm local time each Friday during the summer. Historically, employees were required to use a full PTO day to take an entire Summer Friday off. However, that is no longer applicable with the new Unlimited Vacation plan. To take a full day on a Summer Friday, you will just need to request 4 hours of paid time off.

Can I modify my work schedule with the Unlimited Vacation plan?
The plan is intended for routine time off and not for work schedule modification. It is not acceptable or reasonable to request, for example, every Monday or half-day Summer Friday off. This would burden your team and our clients and is not the intention of the plan.

How does this Unlimited Vacation plan work with long-term leave like parental leave?
Review each plan for their specific details. HR can help you navigate things like Short-Term Disability, FMLA, etc. The PTO plan is a separate policy.