Wheelock College and

Boston University Merger

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Introduction

Changes in the higher education sector such as:

- the decline in government subsidies
- increase in tuition and
- the proliferation of online education platforms

HEI's respond.

How much can an institution confirm to or adapt in an ever-changing world?

What does such changes mean or do to its mission or existence?
This means:

- a total overhaul or their demise
- enter into partnership,
- some merge with institutions of similar or adaptable missions.

BU and Wheelock

Boston University (BU)

- Private R1 University in Boston, MA.
- 1839 - started as Methodist missionary school in VT.
- 1867 - moved to Boston.
- Enrollment of about 35,000 students.
- 17 schools and colleges.

Wheelock College (Wheelock)

- Up to 2018, was a small private college in Boston, MA.
- Founded in 1888 by Lucy Wheelock.
- 2015, had only 726 undergrad and 327 grad students
- An endowment of $53.9 million.

Overview of the case

- When it occurred: June 1, 2018
- This happened because Wheelock decided that it was the colleges best interest to merge and choose a partnering school so they could avoid further challenges at the time of uncertainty they were facing
- Wheelock wanted an institution with similar interests and programs
- This is when they decided to partner with BU

What is Administration doing?

- President David Chard of Wheelock will serve as Dean ad Interim of his current university
- Chard will report to the University Provost and Chief Academic Office Jean Morrison, who reports to President A. Brown. The Board of Trustees oversees BU.

Primary and Secondary Sources

- Ms. Katherine Nelson
- Mr. Steven Davidson

- Journal Articles
- School Websites
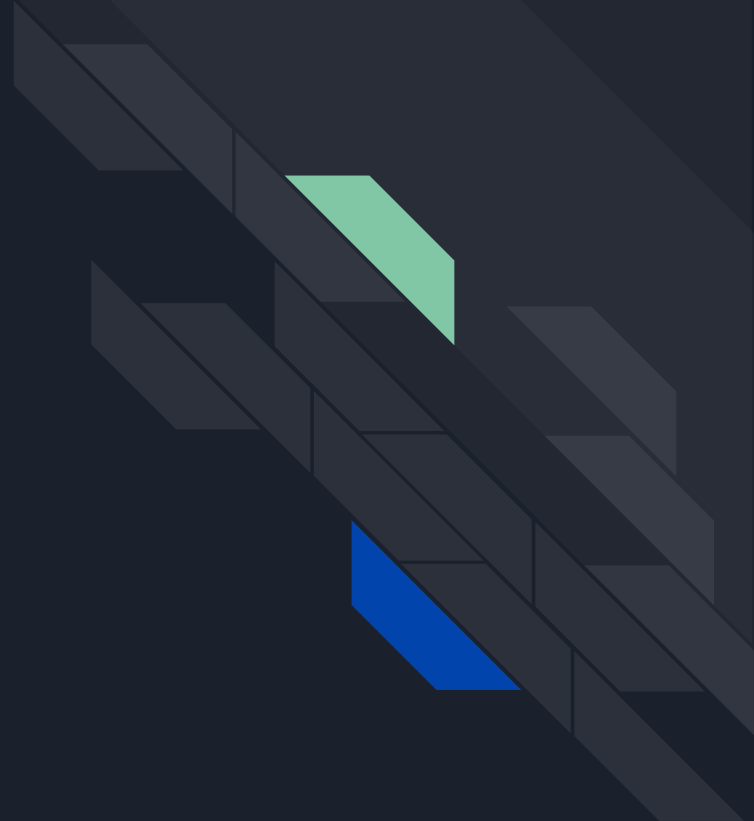
Leadership & Change Theory Applied

This study utilized *Pragmatic Leadership Theory* and *Kotter's Eight Steps Process of Leading Change* as theoretical lenses for the analysis of this case study. While our study did not gather any form of data that suggest the application of these theories by the stakeholders in this merger, we believe these theories help us make sense of the process that Boston University and Wheelock College went through.

Pragmatic Leadership

Pragmatic leadership theory puts emphasis on a leader's ability to identify and communicate feasible solutions to problems, mobilize people and resources and create structures to support the implementation of these solutions (Mumford & Van Doorn, 2001). In other words, pragmatic leadership puts emphasis on what is applicable based on the situation at hand and the resources available for it. Pragmatic leadership is also concerned about the how question. How do we get there? As opposed to idealistic leaders who have their sight on the end goal, pragmatic leaders believe in having a roadmap to the destination.
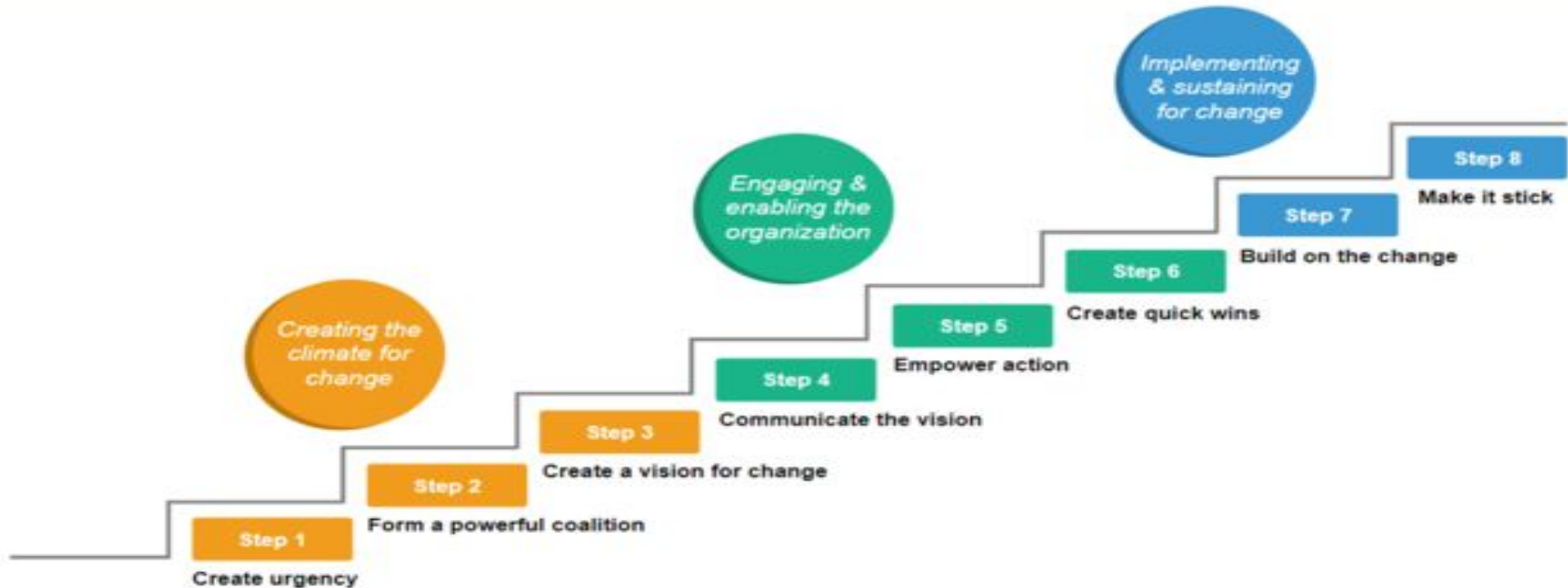
Pragmatic

Robotic

Chaotic

Kotter's 8 Steps Process of Leading Change

- A guideline in change management.
- introduced in his book *Leading Change.*

Kotter's 8 Step Change Model

Implementing & sustaining for change

Engaging & enabling the organization

Creating the climate for change

Step 8 — Make it stick

Step 7 — Build on the change

Step 6 — Create quick wins

Step 5 — Empower action

Step 4 — Communicate the vision

Step 3 — Create a vision for change

Step 2 — Form a powerful coalition

Step 1 — Create urgency

Merger Outcomes - Documented

Wenrick 's (2018) research identified 3 specific outcomes that Wheelock set forth before the merger took place:

- The name and identity of Wheelock should remain in some form.
- Wheelock's future mission needed to be consistent with its historic mission
- Wheelock's faculty and staff would have to be treated with respect.

Merger Outcomes - Identified post-merger

- BU's School of Education renamed Wheelock College of Education and Human Development at BU
- Many derivations of mission - historic and future
  - Cultural Differences between BU & Wheelock
    - Steven Davidson
    - Katherine Nelson
- Faculty & Staff

Lessons Learned

- From Wheelock's prespective
  - Take actions before a crisis in the full bloom
  - Identify the core mission or purpose of the institution that it wishes to preserve
- From BU's prespective
  - Communication
  - Culture: "make it stick"
- Form a powerful coalition: transition committee
- Put people first

Q&A