

## MEMORANDUM

To: Ryan Forsythe

From: Courtney Connor  
David Strauss

Subject: A&S Strategy and Positioning Study: Summary and Timeline

Date: August 22, 2017

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All of us at Art & Science Group look forward to our collaboration with Worcester State University. This project is designed to help WSU move forward with institutional strategy that will strengthen further its market position and expand its reach. Our firm has pioneered the most advanced research and planning methodologies for helping institutions refine their identities and strengthen their competitive positions. We are committed to the notion that efforts such as these must be rooted firmly in the institution, not imposed from the outside. At the same time, they must have a tangible impact on the behaviors of key constituencies. Our approach is to identify an array of valid thrusts and facets of Worcester State's identity, plans, and strategic options, to vet them internally, and then to subject them to highly rigorous testing through research with key constituencies, before helping to make decisions about the most effective ways to proceed.

During this project, we will work closely with a small working group of University faculty and staff to answer the following questions:

- What would the WSU community like to say about the undergraduate experience it offers, and how does that message compare with how WSU is currently perceived?
- Within what competitive context is the University trying to be heard? What perceptual obstacles must it overcome?
- What can the University say and do that will resonate and actually change the behaviors and satisfaction of prospective students?

- How should Worcester State position itself in its prospective undergraduate student markets?
- How can WSU effectively dovetail the outcomes of its strategic planning to provide a substantive basis for a strengthened market position among prospective undergraduates?
- How does all of this relate to Worcester State's ability to generate net revenue from undergraduate students?

To achieve these goals, the project will begin with an internal strategic analysis, including a two-day campus visit spent interviewing leadership, faculty, staff, and students and a review of background data and communications materials. We will then conduct market research with three key domestic prospective student groups: in-state SAT-takers, out-of-state SAT takers, and students admitted to WSU. We will analyze and present the findings of this research as it is completed, evaluate and present a summary of research findings and their implications, and, finally, present our recommendations for WSU's institutional strategy. Community presentations and/or implementation activities, to be determined together based on the University's needs, will conclude the project.

**PRELIMINARY TIMELINE**

***October 2017***

Strategic assessment, including two-day campus visit (Oct 3 - 4)

***November-December 2017***

Develop research instruments in collaboration with the working group

***February-April 2018***

Fielding of research with inquiring students

***June-July 2018***

Presentation of findings from research with inquiring students

Fielding of research with admitted students

***August 2018***

Presentation of findings from research with admitted students

***September/October 2018***

Presentation of research implications for discussion

***October/November 2018***

Presentation of strategic recommendations

***November/December 2018***

Community presentations and/or implementation activities, to be determined based on the University's needs

## **ON-SITE PROJECT TEAM**

David Strauss and Courtney Connor will lead all phases of the project and are supported by Art & Science Group's research team.

### **DAVID STRAUSS**

#### *Principal*

David Strauss's work focuses on institutional positioning, enrollment interests, and advancement, including: market research and analysis, integration of market positioning and strategic planning, development of marketing and communications strategies and tactics, analysis and planning of pricing and financial aid strategies. Consulting to higher education since 1985, Mr. Strauss has been instrumental in developing survey research-based modeling techniques to inform strategic planning initiatives, and to analyze and plan tuition pricing, as well as econometric modeling techniques to assist colleges and universities in optimizing their use of financial aid. His work on promotional communications has won a number of major national awards. Prior to co-founding Art & Science Group in 1994, David was senior vice president of The Barton-Gillet Company. Previously he served on the staff of Lawton Chiles when Chiles was a United States Senator from Florida.

#### *Education*

- B.S. in political science, Massachusetts Institute of Technology (MIT)
- B.S. in mechanical engineering, MIT
- M.B.A. in management and marketing, Wharton School, University of Pennsylvania

### **COURTNEY CONNOR**

#### *Managing Associate*

Courtney Connor provides strong skills and experience in project management, data analysis, research design, survey development, and data interpretation and presentation. Before moving into her role as Managing Associate, Ms. Connor wrote questionnaires and supervised fielding for all research projects, including positioning and strategic planning studies conducted for independent schools nationwide as well as large-scale pricing and positioning studies for private and

public colleges and universities across the country. She has played an especially active and integral part in much of the firm's work for independent school clients, from developing questionnaire and conducting interviews to analyzing findings and presenting conclusions to clients.

Prior to joining A&S, Ms. Connor worked in the Research and Evaluation Department at the Georgetown University Center for Child and Human Development. She worked on a variety of projects and was responsible for the qualitative component of a comprehensive study funded by the Maryland State Department of Education's Childhood Development Division. Her work at Georgetown contributed to the development of strategies to identify at-risk children, teach families how to advocate for children with special needs, and improve pre-school retention.

### *Education*

- B.A. in psychology, Georgetown University
- M.A. in organizational leadership, Gonzaga University