

**Examining Academic-Consulting in Canada:
Conditions for Successful Academic-Consulting Engagements**

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Abstract

Academics are becoming increasingly involved in academic-consulting, whereby they engage in consulting projects outside of their regular academic duties. However, little research has been done to determine the implications and barriers to success for such engagements. This unique research provides new knowledge on the area of academic-consulting by providing a practical review of the success conditions for academic-consulting.

Quantitative and qualitative research methods were employed to gather experiential data from 20 Canadian survey and interview participants, all of who had experience with academic-consulting. Based on the results of the exploratory research, there are four key implications that must be considered before engaging in academic-consulting: motivations, university culture and policies, academic experience in consulting and project specific conditions.

In conclusion, it was determined that all of these conditions must be considered by not only the academic involved, but by all stakeholders of the engagement. Furthermore, it is concluded that although academics have certain predispositions and environmental factors that affect their success, like any other consultant, the success of an academic-consultant depends on their ability to effectively consult.

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Chapter 1: Introduction

1.0 Background

The general population may imagine an academic as an absent-minded professor who is out of touch with the real world. However, this ‘middle-aged, aloof, bespectacled’ media-spun image of an academic is far removed from reality. In fact, the definition of an academic and their scope of activity span such a wide array of possibilities that you will hardly find two professors whose job descriptions match, let alone personalities.

Today, academics are not only involved in the classically associated responsibilities of teaching and research. As highly regarded subject matter experts in their respective communities, academics often become involved in everything from participating on boards, to leading workshops, to consulting. However, with this expansive list of duties comes an expansive list of required skills that an academic must possess in order to meet the expectations and needs of such duties. A great baker does not necessarily make a great cook, nor does a creative writer necessarily make an enchanting storyteller. Similarly, not every academic acquires such a diverse portfolio of skills; ultimately, some academics can take on many roles with ease, while others fall short.

Of particular interest is whether or not academics can transition into the management consulting community as an academic-consultant; or, in other words, engage in a consulting project in the role of management consultant. Current Canadian statistics regarding the academic-consulting participation rates are not available. However, some

key statistics provide evidence of the popularity and growth of academics engaging in management consulting. For example, the management consulting services industry in Canada generated close to \$9 billion in revenue in 2011, making it an incredibly lucrative industry for consultants and academics alike (Statistics Canada, 2013). On average, experienced management consultants can take home an annual salary of \$126K (PayScale, 2014). Additionally, 50% of academic survey respondents in this research indicated that supplemental income was their primary motivation for engaging in consulting outside of their university duties. Finally, some of Canada's most well known schools, such as the University of British Columbia and University of Toronto, have created policies specifically outlining the responsibilities of faculty engaging in consulting contracts (Johnson, 2007). Altogether, the growth and popularity warrants further investigation into the topic of academic-consulting.

1.1 Definitions

Before proceeding, it is prudent that the reader fully understand the details and context of each of the three primary roles discussed in this research: (i) academic, (ii) management consultant, and (iii) academic-consultant.

In simplistic terms, an academic is a leader of higher education. In the more traditional sense, an academic is defined as someone employed at an academic institution as a scholarly expert in a particular field of study. The goal of the academic is to further advance their field of study by sharing and creating knowledge, primarily through teaching students and conducting research. As previously discussed, the role of the academic has advanced and academics do more than just traditional teaching and research; they partake in other knowledge mobilization activities such as workshops, industry projects, consulting and much more. An even more contemporary school of thought defines academics outside of an educational institution, whereby academics are defined as ‘professional thinkers’ (Hope, 2013). For the purpose of this research, we define academics as those employed at an academic institution whose primary responsibilities are teaching and research, but who partake in non-traditional knowledge mobilization activities.

A consultant provides advice on specific areas of expertise. In particular, management consultants provide advice on the area of management, whereby they help organizations achieve their desired organizational goals (CMC-Canada, 2014). The responsibilities of a management consultant include a wide array of organizational topics on everything from problem solving to organizational restructuring to change management, largely dependent

on the management consultant's area of expertise. For the purpose of this research, the abbreviated term 'consultant' is reference to 'management consultant'.

Although these are two completely different professions, it is important to note that both careers are rooted in the idea that the professional is a subject matter expert in a particular area of expertise, and the purpose of their role is to share and apply their expertise knowledge.

An academic-consultant is anyone who crosses the boundaries of both academic and consultant. An academic-consultant is a part-time or full-time faculty member at an institute of higher education with scholarly responsibilities. In addition, an academic-consultant pursues consulting activities by participating in consulting projects in a management consulting role. They may have obtained the work through the academic stream, independent bids on consulting projects or otherwise. Overall, an academic-consultant wears both the hat of an academic and a consultant, while meeting the responsibilities of both employers.

1.2 Motivation of Study

As discussed in Chapter 2, much of the related research indicates that academics are certainly suitable candidates for management consultants. However, the research also indicates that there are limitations that both academics and the consulting community must consider before engaging in a project involving academic-consultants. On one hand, there is the potential for conflict of interest to arise as the academic may neglect their university duties in favour of more profitable consulting ventures. On the other hand, there is the potential for the academic to lack the consulting experience necessary to provide the high quality deliverables that management consulting projects require.

As outlined in Chapter 2, the previous research is mainly focused on knowledge dissemination between the two groups. Research exists on the success factors related to academic-consultants; however, much of this research has a broad scope and considers academics from any faculty. Not distinguishing between faculty in the research makes it much more difficult to confirm whether success factors are a result of consulting factors or specific to the topic of interest. For example, a consulting project involving medical academics will have success factors rooted in more scientific outcomes than organizational outcomes, and overall is a more research-oriented project. The same is true for other science centric consulting, such as engineering or computer science. Finally, while there does exist some literature specifically on management academics, the research undertaken captures the views and attitudes of both consultants and academics in a Canadian context, as well as providing practical recommendations that current research lacks.

The primary motivation for this study is to provide stakeholder communications with recommendations for engaging academics in consulting to ensure success. This research will further expand on the current research by providing unique recommendations to different stakeholder groups of the academic and consulting community: academics, consultants, project sponsors and university institutions. Additionally, this research expands on the current research by focusing specifically on management academic faculty from Canadian institutions. The goal is to not only better understand the attitudes of those involved in such collaborative engagements, but also to better understand the success factors so as to make recommendations to the community on how to improve these working relationships. Overall, what is required for academics to make a successful transition into the role of management consultant?

The research is structured as follows: The subsequent section in Chapter 1 presents the key research questions to be answered. The current research literature on academic-consulting is reviewed in Chapter 2. Chapter 3 outlines the research methodology, including a discussion on the research design and execution. The results of the research are discussed in Chapter 4, while Chapter 5 expands on the discussion of the results by developing a list of best practices and recommendations for the academic-consulting community. Finally, the research is concluded with the key lessons learned and recommendations for future research.

1.3 Research Questions

This research study aims to answer the following questions:

What are the optimal projects for academics to be engaged in?

How can consultants help academic-consultants improve their consulting skills?

What competencies must an academic possess in order to be successful?

How can the university environment improve the probability of success?

Overall, what must an academic, consultant, project sponsor or university consider before engaging in academic-consulting projects?

Chapter 2: Literature Review

2.0 Purpose

The purpose of the literature review is to explore current research on the topic of academic-consulting. Given that the amount of research in this area is limited, the review evaluates a total of five recent publications in detail. For each publication, the themes, research methods, limitations and relationships to this research are discussed. Although brief, the literature review provides a foundation for developing and interpreting the results of the research undertaken.

It is important to note that there were a number of other publications related to the topic of academic-consulting. However, these were very specific to certain subject areas, such as project management (Walker, Anbari, Bredillet, Soderlund, Cicmil, & Thomas, 2008), science innovation (Mansfield, 1995), or supply chain management (Morgan & Lightner-Laws, 2013). Additionally, there was also literature on the topic of knowledge dissemination, specifically one-way knowledge transfer from consultants to academia (Serrano-Velarde & Krücken, 2012), and consulting as a strategy for knowledge transfer (Jacobson, Butterill, & Goering , 2005). However, these articles did not discuss academic-consulting in enough detail to warrant a discussion of the entire publication.

2.1 Knowledge Creation for Practice in Public Sector Management Accounting by Consultants and Academics

The research of van Helden et. al is based on eighteen in-depth interviews to gain a better understanding of how knowledge is created by both academics and consultants in the field of management accounting (van Helden, Aardema, ter Bogtc, & Grootd, 2010). The researchers focus on how both academics and consultants create knowledge and if either party affects the knowledge creation of the other. While the research is focused on the area of management accounting, there are some key findings that can be applied to the academic-consultant relationship in general.

The authors group their interviewees into three categories: academics, consultants and consultant-academics. The knowledge creation of academics and consultants differs greatly in both the type of knowledge they create, their motives for creation and their knowledge sources.

The researchers found that an academic creates knowledge that is typically based on community publications, a knowledge transfer medium that is considered explicit knowledge. On the other hand, a consultant will certainly create reports that are considered explicit knowledge, but these reports are limited to a specific audience making them less available to the community. The main focus of a consultant is not this explicit knowledge, but rather the collaboration with a specific client. Overall, academics are more focused on explicit knowledge, while consultants are focused on tacit knowledge.

The motives for knowledge creation are also quite different. Academics are typically more interested in answering fundamental research questions; whether or not these

research questions are practical are often up for debate. There are some academics that conduct research that is rooted in practicality, while others are motivated by university publications counts. The practicality and motivations of an academic will depend on the individual research environment that the academic resides. Consultants are more concerned with the practical implications of their knowledge creation as it specifically relates to their clients and the market demand. Overall, academics are more focused on discipline driven research as it relates to the publishing community, while consultants are focused on solving a specific problem as it relates to the market.

Finally, the researchers identified that the knowledge base these parties use for sources of input also differs. Academics use academic journals, research publications, conferences and other researchers as a source of knowledge input. On the other hand, consultants mainly rely on shared information with colleagues, professional journals and internal knowledge available from their firm.

The researchers found that knowledge transfer between the two parties is quite weak and so there is a strong emphasis on intermediaries to play a role in knowledge transfer. Among other suggested intermediaries, this research notes that the consultant-academic plays a strong intermediary role in this knowledge transfer.

This research provides a great foundational understanding of the knowledge transfer and inspired the topic of knowledge dissemination found in the research undertaken. However, the drawback of van Helden et al.'s research is that it is specific to the accounting discipline and knowledge dissemination in general.

2.2 Consulting, Research and Consulting Research

Shugan takes a literature review approach to understanding the implications of consulting research, whereby consulting research is defined as academics performing research as part of a consulting engagement (Shugan, 2004).

First, the author identifies that the motivations for academics pursuing consulting include: (i) increased pay, (ii) improving effectiveness in the classroom, and (iii) general interest in applying research to a practical environment.

Secondly, academics are best suited for consulting in highly specialized areas to better utilize their subject matter expertise. Since a firm is well versed in its own expertise, there is increasing demand for academic consultants to assist in complex problems that are outside of the firm's capabilities. The author contrasts these benefits with the drawbacks of academic consulting that include the time demands placed on academic scholars. With an additional item on their list of duties, it adds strain to their already overflowing workload.

Shugan points out some key characteristics of academic research: (i) academic research is open and available to the community, (ii) the research and methodology should be replicable, (iii) the research should produce new knowledge, and (iv) scholarly research is subject to criticism and so a 'less-than-perfect' solution is not an option. There are conflicting reviews on the overall relevance of academic research. Some critics state that academic research is irrelevant for practical application, and focuses on a narrow scope that fails to recognize the big pictures. In contrast, supporters of academic research posit that such research provides new methods and innovations within the industry. Regardless

of support or disapproval, the author points out that there is a knowledge dissemination process that needs to occur in order for academic research to be useful to practitioners, and that consulting research can play a role in this knowledge dissemination.

In order to be effective, the researcher concludes that consulting research needs to focus on simplifying decision making for managers and identify which variables are important to include in decision making. Additionally, the research needs to go outside the realm of typical academic publications to take into consideration some factors that peer-reviews typically ignore, such as ease of implementation, recommendations or other practical elements. Ultimately, academic consulting research needs to be practical for practitioners to apply and understand.

This research inspired the topic of project suitability for academic-consultants in the research undertaken. However, the drawback of Shugan's research is that it draws conclusions from many different topics. For example, many conclusions are drawn based on research in the areas of academic policy, general academic research and academic enrichment, rather than on research in the area of academic-consulting. Additionally, it is a literature based survey that uses existing research as the basis for drawing conclusions; and, this style of research lacks unique quantitative or qualitative data.

2.3 Engaging the Scholar: Three Types of Academic Consulting

Perkmann and Walsh attempt to answer the following questions: To what extent does consulting affect research topics and direction? Does consulting distract academics? And, how does this collaboration affect innovation within firms? In doing so, they create a three-tiered categorization of consultancy based on a review of existing literature.

Similar to the previous articles discussed, the authors postulate that the primary benefit to involving academics in consulting is their subject matter expertise. Therefore, to categorize the types of consulting engagements, the authors create three tiers of based on the academic's motivations for engagement.

The first, opportunity-driven consulting, is characterized as opportunities that attract researchers based solely on monetary incentives. However, much of the research suggests that many academics don't participate in these engagements solely for monetary gain. As alternatives, two different categories are discussed: commercialization-driven consulting (efforts to commercialize their own technologies) and research-driven consulting (directly supports their research).

The authors conclude that research-driven consulting is the area that is most beneficial for both industry and academia. Specifically, research-driven consulting is motivated by the academic's desire to perform consulting to gain insight into industry challenges. As such, this type of research does not distract academics from their other duties. Rather, the authors deems research-driven consulting as the only type of consulting that has a positive impact on research productivity, whereas the other two types are assumed to have neutral or negative impacts on research productivity.

This research inspired the topic of motivations in the research undertaken. However, similar to previous research discussed, the drawback of this research is the literature based style that uses existing research as the basis for drawing conclusions. Furthermore, the research is not limited to management consulting and has a strong emphasis on technology and innovation, a topic not particularly important to productivity or effectiveness of management consultants.

2.4 Academia, Industry and Consulting Firms in Collaboration

Börjessonac et. al. evaluate the difficulties that occur during the collaboration of consultants and academics (Börjessonac, Bruceab, & Forsbe, 2000). By evaluating common narratives, the authors postulate that the motivational differences between the parties are a primary barrier to collaboration. The research is based on the authors' individual experience in industry, academic and consulting.

The most common narrative that the authors review is the perception that researchers are viewed as more neutral than consultants due to the consultant's monetary motivations. The implication of these narratives in the research undertaken is that the perceptions of the consultant versus the perception of the academic; one is deemed as knowledge driven while the other is deemed as monetary driven.

In addition to the narratives, the authors provide a characteristic matrix that describes the industry, the consulting business and academia based on five criteria: nature of competition, goal prioritization, reward system, promotion, and perspective of knowledge. This characterization shows us the key differences between those in consulting and academic, primarily the idea that goal prioritization for academia is based on research and the pursuit if knowledge, while that of consultants is driven by product or service quality.

While the authors provide some suggestions, these characteristics are subjective to the authors' viewpoint only, with little reference to existing research. However, despite these limitations, this research provides a unique narrative-based approach to reviewing the dynamics of academics and consultants.

2.5 Scholarship That Matters: Academic–Practitioner Engagement in Business and Management

Hughes et. al. research the topic of academic-practitioner engagement, with emphasis on understanding the practical relevance of academics to practitioners. Specifically, how are academics able to best keep in touch with reality, and how can practitioners make the best use of academic knowledge? The authors explore the topic of academic-practitioner engagement by undertaking a set of 68 interviews with both academics and practitioners in the management field.

The authors discuss a popular point of view from Bennis and O’Toole (2005) that indicates business schools have lost their focus on practicality, and instead are too focused on the scientific rigour of research. Bennis and O’Toole argue that business schools have adopted a ‘scientific model’ comparable to other scientific disciplines like chemistry or physics, whereby academic excellence is rewarded based rigorous research that is not necessarily rooted in practical business applications (O’Toole & Bennis, 2005). In contrast, the authors point out that having practitioners and industry too involved in setting the research agenda may lead universities to lose what makes them unique, and that is producing new knowledge.

The authors focus specifically on the knowledge gap between academics and practitioners. They aim to better understand how the groups create and disseminate knowledge, as well as identifying the characteristics of those involved in the engagement.

Six routes to engagement are identified including: courses and programs, research, publication, conferences, knowledge networks and finally, academic consultancy. The

authors identify academic consultancy as an important route to disseminating knowledge between the two groups, indicating that it is potentially one of the strongest ways in which this knowledge transfer can happen. Like other literature, the concerns of motivations and commercial confidentiality in academic-consulting are highlighted.

In addition to the exchange routes, academics involved have been characterised based on to their ability to engage with practitioners as willing and able, willing and underexposed, or theoreticians. Similarly, practitioners are characterised based on their desire to engage with academics as enthusiasts, uncommitted or cynical. Among other conclusions on the topic of engagement, the authors conclude that consultancy plays an important role in transferring knowledge between those groups who may not necessarily be involved in knowledge transfer otherwise, such as the cynics or theoreticians.

This research inspired the use of in-depth interviews and expanded on the area of knowledge dissemination. The sample size was large enough to be confident in their findings related to academic-practitioner engagement. However, the scope of this research is on general engagement, and so academic-consulting was only a small sub-section of discussion. The limitation is that the findings are not detailed enough on academic-consulting to provide any in-depth recommendations on how to successfully perform academic-consulting.

Chapter 3: Methodology

3.0 Research Design

The limited amount of research means that the literature review is used as a foundational basis for developing and interpreting the research; there are not enough concrete conclusions from the literature to integrate those findings directly into the research methods or resulting recommendations. Given this limited view on the topic of academic-consulting, both quantitative and qualitative research methods are employed using an exploratory approach.

The quantitative element is a short twenty-two question survey that aims to provide quantitative proof or disproof of four common themes found in the existing research: (i) motivations of academic-consultants, (ii) knowledge dissemination trends among academic-consultants, (ii) the role of the academic institute in supporting academic-consultants, and (iv) the general opinion of academic-consultants. The survey is composed of four sections, each correlating with the aforementioned themes. The anonymity of research respondents and their responses was maintained by distributing the survey using online survey software.

On the other hand, the qualitative element of the research is an experiential study using structured interviews. The benefit of an experiential method is that it provides a microscopic view, rich with detail that quantitative data is unable to provide (Stake, 2010). Experiential research is based on the interviewee's personal, albeit subjective, experience. In using this exploratory research approach, situational variables can be more easily discovered. To conduct the structured interview, a series of eight questions were

used as a guideline for further exploration into the topic (Trumbull & Stake, 1982). However, if at any time during the interview there were topics presented by the interviewee that were of particular interest to the research, further probing questions were asked of the interviewee. For more details on the research methodology, please refer to the appendices.

3.1 Sample Selection

Participants of the research were either academics who participated in management consulting as part of their secondary activities, or management consultants who have worked on consulting projects with such academics. The academics were recruited from management and business faculties of Canadian post-secondary institutions, primarily universities. Academics were to have management consulting experience, but there were no limitations placed on the types of organizations consulted or the frequency of consulting. There were no limitations placed on the management consultants that were recruited, other than that they were Canadian-based management consultants who had experience with working with academics in a management consulting setting.

To recruit research participants, a research participation invitation was sent to 46 Canadian business schools from all across Canada (see Table 1: Profile of Business Schools Contacted) explaining the purpose of the study and requesting feedback from eligible academics. Eligible participants were provided the option to complete the online survey or partake in a structured interview.

Table 1: Profile of Business Schools Contacted

Region of Canada	Percentage of Canadian Population (Statistics Canada, 2013)	Number of Business Schools Contacted
Atlantic Canada	6.8%	7 (15%)
Central Canada	61.7%	20 (44%)
Western Canada	31.2%	19 (41%)

For those that participated in the online survey, basic demographic details were gathered such as geographic region of work and indication of their academic and consultancy status within the community (see Table 2: Profile of Online Survey Participants). Given the anonymous nature of the online survey, it was not possible to influence the diversification of the types of survey respondents and so the majority of survey respondents are academics from the Atlantic region of Canada. Additionally, a low response rate of the online survey resulted in only 10 respondents, which further limits the diversification of survey responses.

Table 2: Profile of Online Survey Participants

Characteristic	Percentage of Participants
Location: Atlantic Canada	60%
Location: Central Canada	40%
Location: Western Canada	0%
Location: Northern Canada	0%
Role: Primarily Academic	90%
Role: Primarily Consultant	10%
Frequency: Consulting Weekly	20%
Frequency: Consulting Monthly	40%
Frequency: Consulting Yearly	40%

The sample of interviewees included all invitation respondents that agreed to participate in the structured interview portion of the study. Similar to the online survey respondents,

basic demographic details were gathered such as geographic region of work and indication of their academic and consultancy status within the community (see Table 3: Profile of Interviewees). Additionally, given the low response rate for participating in the structured interview, there is not much variety in the demographic profiles of the survey respondents as many of the interviewees are academics from the Atlantic region of Canada.

Table 3: Profile of Interviewees

Region of Canada	Role of Interviewee	Exposure to Academic-Consulting
Atlantic Canada	Academic	Full-time academic with weekly consulting projects
Atlantic Canada	Academic	Full-time academic with yearly consulting projects
Atlantic Canada	Academic	Full-time academic with yearly consulting projects
Atlantic Canada	Consultant	Consultant with exposure to academic-consultants
Atlantic Canada	Consultant	Consultant with exposure to academic-consultants
Atlantic Canada	Academic	Full-time academic with yearly consulting projects
Atlantic Canada	Academic	Full-time academic with yearly consulting projects
Atlantic Canada	Consultant	Consultant with exposure to academic-consultants
Atlantic Canada	Consultant	Consultant with exposure to academic-consultants
Atlantic Canada	Consultant	Consultant with exposure to academic-consultants

3.2 Data Analysis

To analyze the survey material, survey responses were summarized and consolidated for review using common survey analysis approaches (University of Reading, 2001). Responses were analyzed to the first degree by creating one-way tables summarizing the questionnaire responses. Furthermore, responses were then cross-tabulated to identify any correlations or relationships between respondents, particularly reviewing the responses and classifying them based on the types of respondents.

To analyze the interview responses, common responses and themes were consolidated, specifically in the areas of: (i) motivations of academic-consultants, (ii) knowledge dissemination trends among academic-consultants, (iii) the role of the academic institute in supporting academic-consultants, and (iv) the general opinion of academic-consultants. Consolidation of answers was not necessarily based on question as discussion of the various topics occurred throughout multiple areas of the interview. Interview answers were kept completely anonymous by removing any identifiers from interview statements and consolidating answers without any reference to the original interview.

3.3 Limitations

Before presenting the research results, it is important to recognize the limitations of the research study. Although these limitations could place some bias on the research findings, it does not detract from the value of the research findings and the subsequent analysis.

- (i) The majority of survey and interview participants are academics. Likely a result of the nature of the study and the inclination to support research, academics were more willing to participate in the research study than consultants. Specifically, only 30% of respondents had worked with other academic-consultants, while 70% had only their own personal experience to draw upon. This characteristic has the limitation of false self-appraisal in that academics may give themselves higher self-appraisals in their ability to partake in academic-consulting.
- (ii) All of the academic survey respondents are from Canadian universities. There are no responses from mid-level post secondary institutions, such as colleges or trade schools. This is a result of limiting the research scope to university intuitions only. This characteristic has the limitation of missing a key target survey segment, as many college and trade schools instructors come from a career background in their field of instruction.
- (iii) There is a ‘home advantage’ to the research in that most of the survey and interview participants are from Atlantic Canada. This characteristic has the limitation of being biased to the Atlantic Canadian knowledge economy, which differs from that of other Canadian regions. Specifically, Atlantic Canada attributes a larger proportion of economic development as a result of

university impact from research and development activity (Lebrun & Rebelo, 2006).

- (iv) Given the number of universities and consultants contacted, there was an extremely low response rate. Assuming that at least 10 management faculty members were contacted from each university, close to 500 faculty members were contacted. This estimate does not include any of the consultants and consultant organizations contacted. Based on this estimate, the research study achieved a less than 4% response rate.
- (v) Interview research methods have inherent limitations, specifically the fact that the findings are subjective or the interviewee's responses can be affected by the presence of the interviewer (Anderson, 2010).

Chapter 4: Analysis of Results

In this chapter, the results of the survey and interview findings are reviewed and analyzed. The topics of the analysis specifically relate to common themes found in existing literature, including: (i) motivations, (ii) university culture, (iii) knowledge dissemination, (iv) academic-consulting benefits, (v) success factors and (vi) academic-consulting attitudes. In addition to the comparative analysis, new findings that are not present in the existing research are a focus of discussion.

The analysis is presented as a combination of survey and interview findings. For each topic, a summary of the survey results are discussed first, followed with specific examples of supportive or unsupportive evidence discovered from the exploratory interviews. Where necessary, case study evidence is provided as a source of further analysis for the specific topic being analyzed. For example, specific university policies regarding academic-consulting are presented as a comparative view to the results discussed in the academic policies section.

Please note that for survey responses that required a rating, all answers have been converted to a percentage base. In addition, an average rating indicates the *total* average response. For example, if six participants responded with a '4' and four participants responded with a '3', the average rating is 3.6. When converted to percentage base, the average response is 72%. The purpose of converting to a percentage base is to make it easier for the reader to comprehend the analysis, as percentages are frequently used as a means for rating or grading. The reason for *not* directly asking the research participant to

provide a rating from 1 to 100 is that such a wide range of possibilities makes answering a question much more difficult.

Additionally, please note that interview responses have been paraphrased or summarized so as to improve readability and comprehension of the interview responses. Although this has some inherent weaknesses related to the researcher's interpretation, the researcher made the best effort to ensure that the context of the response remains in tact.

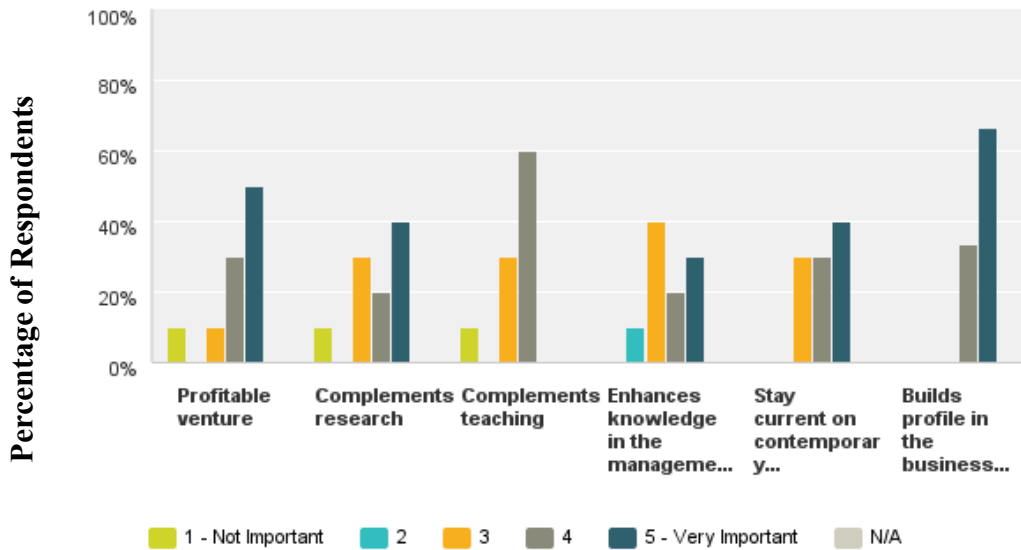
4.1 Motivations

Survey Responses

Participants of the survey were provided with a list of six motivators for participating in management consulting. Motivators ranged from complementing teaching to profitability to providing the ability to stay current on contemporary issues (see Figure 1: Respondent Rating of Motivators). Respondents were asked to rate the motivators for participating in management consulting on a scale of one to five, where a response of '1' represented not important, and a response of '5' represented very important. Although each motivator was rated independently of one another, all motivators were presented together.

The results from this survey question indicated that the main motivation for participating in management consulting as an academic was to build and maintain your profile in the business community (see Table 4: Respondent Rating of Motivators). In fact, the response not only generated the highest overall score of 94%, it also generated the least variation in responses. This indicates that, on average, the vast majority of academic-consultants are primarily motivated to perform consulting because it provides them with the opportunity to build and maintain their profile in the business community. In other words, the ability to expand their portfolio and gain recognition in the community is the greatest motivator for academic-consultants.

Figure 1: Respondent Rating of Motivators



Both the motivators of profitability and staying current on contemporary management issues ranked second highest with a rating of 82%. Although both ranked the same in terms of average rating, profitability has a much larger variance than the motivation to stay current; the rating of motivation from profitability ranged from 1 through to 5, while the rating of motivation from staying current on contemporary business issues was rated as 3 or higher. In other words, in some instances, academic-consultants may or may not be motivated by profitability at all, whereas staying current has at least some value to academic-consultants.

However, on average, profitability is a *stronger* motivator to those it motivates versus the strength of motivation from staying current on contemporary business issues. More respondents ranked profitability as the highest motivator than they did staying current on contemporary business issues.

Keep in mind that respondent's were able to rank motivators equally; for example, some respondent's ranked profitability and building their profile in the business community as equally strong motivators. In order to force respondents to rank one as a greater motivator than the other, the survey asked for participants to choose one as the strongest, most influential motivator. Interestingly, the most common response to this question was 'profitable venture'. Although seemingly contradictory, 50% of respondents ranked both motivators as equally strong but all of those respondents selected profitable venture as the strongest motivator.

Overall, the results from the survey questions regarding motivators indicate that the profitability of academic-consulting is the strongest motivator for academic-consultants. However, profitability does not motivate all academic-consultants. What motivates all academic-consultants is the idea that engaging in consulting activities will help to build their profile in the business and academic community. It could be argued that this motivation will indirectly affect the profitability of an academic in the long run insofar as the greater the profile and reputation, the more projects and engagements the academic is awarded. However, there is some intrinsic value of reputation and enhanced profile that is unrelated to the monetary gains. Based on the survey responses, this is the value that all academic-consultants are motivated by regardless of their commercial motivations.

Table 4: Respondent Rating of Motivators

	Percentage of Respondents per Rating						
	1	2	3	4	5	Average Rating	Variance
Builds profile in the business and academic community	0%	0%	0%	30%	70%	94%	0.42
Profitable venture	10%	0%	10%	30%	50%	82%	2.98
Stay current on contemporary management issues	0%	0%	30%	30%	40%	82%	1.38
Complements research	10%	0%	30%	20%	40%	76%	3.12
Enhances knowledge in the management field	0%	10%	40%	20%	30%	74%	2.02
Complements teaching	10%	0%	30%	60%	0%	68%	1.68

The remaining motivators have no clear indication of strength for academic-consultants. Nonetheless, the strong overall average rating indicates respondents agreed to some extent that these motivators are benefits to participating in academic-consulting.

Interview Responses

Although the structured interview questions did not include a question with regards to motivations, the topic was further discussed by those who included motivations as part of their response to the interview questions. The following is a list of interviewee statements regarding the aforementioned motivations:

- More than one interviewee said, verbatim: “*Consulting keeps me ‘fresh’ [as an academic]*”. In fact, this was the most common interview statement (30%)

regarding motivations for academic-consulting. This pattern further supports the survey results indicating that all academic-consultants feel at least somewhat motivated by staying current, or ‘fresh’.

- *“Financial motivation comes last”, “There is some motivation to make money on the side, but it isn’t the primary motivator” and “Money is a primary motivation”* are the general responses regarding financial motivations. These interview responses support the survey results that indicate the wide variance in financial motivations.
- A number of interviewees (20%) referenced their motivation of variety from academic-consulting such as: *“Consulting provides me with the opportunity to learn more and challenge myself.”*
- Although the survey indicates that the motivation to complement teaching is lower than other motivators, the interview responses indicate that this may be stronger than the survey results indicate. However, the interview results indicate more of unidirectional motivation whereby teaching complements consulting and vice versa. For example: *“I am able to try out a facilitation technique in the classroom before trying it with a client”, “I involve students in consulting engagements with clients to improve their learning experience and reduce client costs”* and *“Consulting helps me to stay current for teaching”*.

In addition, there were a number of motivations discussed that did not directly align with the survey responses. The following is a list of such interview statements:

- *“Consulting provides me with the opportunity to work in a more collaborative environment”* and *“Consulting provides you with the opportunity to network more*

and build contacts". These responses indicate that a collaborative working environment that differs from the academic environment is a motivator to some.

- The ability to put their theory in practice for a positive outcome was discussed by 30% of the interview participants. A consultant who worked directly with a number of academics felt that one of the observable motivations for the academics was having their theory be put into practical use; *"They liked having the opportunity to put their theory into practice."* Furthermore, responses like *"You want to contribute because you are putting your experience to work... where you are trying to solve a problem that matters to someone"* indicate altruistic motivations for consulting. For example, one academic preferred to engage in consulting projects with not-for-profits and small organizations that can't typically afford some of the larger consulting firms.

Finally, one interviewee worked with multiple academic-consultants, specifically by coordinating these academics to work on consulting projects. This interviewee stated that the range of motivations is dictated by the university faculty agreement: *"The range of motivations will differ for each academic, and the primary or secondary motivations will often be a result of what the faculty agreement rewards the academic for"*. For example, academic-consultants motivations will be different depending on if a university faculty agreement provides a certain allotment of time to perform non-academic duties versus if a university faculty agreement rewards faculty specifically on research outcomes only.

In addition to this, the interviewee stated that there was often difficulty in working with academics because their motivations differed so much from that of typical commercial consulting agreement. Specifically, the motivation for the firm coordinating the

consulting engagement was primarily financial. However, because the academic's primary motivation was not financial, it was sometimes difficult to motivate the academic to properly perform their duties (e.g.: within scope or timeline) because there was a disconnect in motivations. This is another particularly insightful finding for the subsequent discussion on university culture.

Summary

Collectively, it is apparent that academic-consultants have a number of different motivations for engaging in academic-consulting, including: profitable venture, builds profile in business community, stay current on contemporary business issues, complements research, complements teaching, or enhances knowledge in the management field. The interview results indicated that an additional two motivators exist: collaborative work environment and altruistic outcomes. While motivations varied between academics, there are two key findings. First, financial gains are not necessarily a motivator for everyone but for those that it does motivate, it does so stronger than other motivator. Second, building a profile in the business community is, across the board, a motivator to all academic-consultants. In other words, academics are motivated by an improved reputation as a result of consulting engagements.

4.2 University Culture

Survey Responses

Survey respondents were asked a number of questions regarding the supportiveness of their academic institution. Specifically, they were asked to rate the overall supportiveness of their institution, and how having a policy on academic-consulting contributes to that supportiveness (see Table 5: Respondent Rating of University Supportiveness and Policy).

Table 5: Respondent Rating of University Supportiveness and Policy

	True	False	N/A
No specific university regulations contributes to the supportiveness	30%	30%	40%
Specific university regulations that places limitations on consulting contributes to the supportiveness	50%	20%	30%
Specific university regulations that encourages consulting contributes to the supportiveness	30%	30%	40%

In general, 70% of survey respondents rated the university environment as at least somewhat supportive (40%) or very supportive (30%), with a total over score of 76%. These survey results indicate that university environments are generally supportive of academic-consulting. Unfortunately, the subsequent results regarding policy supportiveness were extremely variable with no discernable trends, and so we are unable to draw meaningful conclusions from the survey on this topic. However, a detailed examination of the interview responses and targeted research into university policies of top Canadian business schools provides additional data from which to draw conclusions.

Interview Responses

Interview respondents were asked to discuss how their respective university environments affect academic-consulting engagements. Additionally, interviewees were asked to discuss specific examples of their academic-consulting experience and relate the importance of the university environment to their experience. There were a number of themes that came across from the interviews:

- (i) The university environment is generally unaware of the academic-consulting engagements and does not affect the engagement.

“There might be a university policy but I am not aware of one” or “The school is generally unaware of the consulting projects and does not check to see if there is any conflict of interest.”

- (ii) The university environment does not see value in academic-consulting, but there is no policy against it.

“There is no policy specifically against academic-consulting and the university doesn’t impede on consulting, but it certainly isn’t rewarded – because you can’t always publish the result of consulting projects, they aren’t particularly valued.”

- (iii) The university environment sees academic-consulting as a valuable asset for the teaching environment, in that academic-consultants can bring lessons learned into the classroom, but there is no specific policy on academic-consulting.

“The university recognizes the skill development that consulting can bring to students.”

These results further ascertain that university policies are very individual to the institution and that each university policy has a unique impact on the academic.

Case Study

Given that the survey responses did not provide strong results regarding university policies, we turn to a case study examination for further analysis. The case study involves the top five business schools in Canada and the top business school in the world, Harvard Business School, all ranked by the Financial Times (The Financial Times, 2014).

Table 6: Top Ranked Canadian Business Schools

Ranking	School	Location
1 st in Canada	University of Toronto, Rotman School of Business	Ontario
2 nd in Canada	York University, Schulich School of Business	Ontario
3 rd in Canada	University of British Columbia, Sauder School of Business	British Columbia
4 th in Canada	McGill University, Desautels School of Business	Quebec
5 th in Canada	Western University, Ivey School of Business	Ontario

For each of the business schools, research was undertaken to determine whether or not the school had a specific policy regarding academic-consulting. Additionally, mission statements and information regarding the business school were gathered to determine the school’s public facing attitudes toward academic-consulting. Prior to reviewing, it is

important to note that this section of research is based on only publically available information and therefore the cultural norms and policies of each university are not captured. Furthermore, these policies are generally university wide and not specific to any one department. For a summary of the results, please refer to Table 7: University Policies on Academic-Consulting.

Table 7: University Policies on Academic-Consulting

	School	Policy	Conflict of Interest Policy	Consulting Limitations	Student Consulting Group	Faculty Consulting Profiles
1 st (World)	Harvard University	✓	✓	✓	✓	✓
1 st	University of Toronto	✓	✓	✓	✓	✗
2 nd	York University	✗	✗	✗	✓	✗
3 rd	University of British Columbia	✓	✓	✓	✓	✓
4 th	McGill University	✓	✗	✗	✓	✗
5 th	Western University	✗	✗	✗	✓	✗

Harvard University

Harvard Business School is almost synonymous with the topic of business and management. The business school is one of the most recognized and reputable business schools in the world, and their published magazine, Harvard Business Review, is one of the top business magazines in the world. Needless to say, Harvard sets the standard for

business schools around the globe and influences many of today's classic and contemporary management practices. We assume that the success of the business school as a whole translates to successful consulting practices and policies. Therefore, Harvard's university policy regarding academic-consulting is the benchmark we use to evaluate the Canadian business school policies.

Harvard University does indeed have a policy regarding academic-consulting (Harvard University, 2014). The policy recognizes the importance that academic-consulting plays in diversifying experience and elevating the teaching experience. Academics are limited to exerting 20 percent of effort on outside work, including consulting. Additionally, academics are not to: undertake projects that interfere with research or teaching duties, partner with other academic institutions, or be involved with projects that are considered a conflict of interest. However, the policy does not give specific details to define conflict of interest or interference. On the contrary, there is no requirement to obtain approval prior to undertaking an academic-consulting project. Although there are restrictions in place, it is the academic's responsibility to reasonably define the elements of the policy.

Furthermore, many of the faculty are active in consulting engagements and have industry backgrounds. Although these consulting engagements are not always immediately apparent in the faculty profiles on the website, they are evident in the CV of each faculty member (Harvard Business School, 2014).

University of Toronto

The University of Toronto has a policy specific to consulting engagements: *Consulting Contracts – What You Need to Know* (University of Toronto, 2007). At the surface, the

university policy recognizes the benefits of academic-consulting and the role it plays in building industry relationships, providing opportunities to apply skills in the ‘real world’ and disseminating knowledge. However, the primary purpose of the consulting policy is to ensure that the university is not held responsible for the outcome of consulting projects and that the academic does not undertake any activities that conflict with the university. For example, academics may consult on research related topics for a company but may not undertake research for the company; or, they may produce publications but if it is of academic nature, it requires approval from the academic head. Additionally, academics must take on consulting contracts as an individual with no affiliation with the university.

In a review of ten randomly selected management faculty members, it was observed that the majority of faculty are certainly involved with a number of engagements outside of academia. However, these were primarily with regards to publishing committees and editorial boards. On the other hand, many of the faculty come from a background in commercial industry (University of Toronto, 2014). The outcome of this review may be a result of university profile structures rather than a true reflection of the extent of involvement in consulting. In observing numerous university faculty profiles, universities tend to ensure that all faculty members adhere to the same profile, or CV, format. In doing so, universities often set the boundaries on highlighting consulting experience in a CV or profile.

York University

York University does not have any apparent university policies regarding consulting. However, the Schulich School of Business has a student-consulting group (York

Consulting Group) run by faculty members with previous and continued experience in consulting (York Consulting Group, 2014). Additionally, management faculty profiles from the Schulich School of Business held similar characteristics to that of the Rotman School of Business. When reviewing a random selection of management faculty members' CV, the primary focus of the faculty profiles was their publications, grants and teaching with no mention of consulting engagements (Schulich School of Business, 2010).

University of British Columbia

The University of British Columbia appears to have positive associations with academic-consulting and other outside activities. To support such activities, the university has a university-industry liaison office whose mission is to ensure that research knowledge is mobilized and disseminated to the relative industries (University of British Columbia, 2014). The office has a short one-page policy on academic-consulting that outlines a high-level list of considerations for academic-consultants. The purpose of the policy is to provide academics with guidelines for conflict of interest and interference with academic duties; ultimately, the guidelines are vague enough that academics would need to exercise their own caution. Additionally, there are a number of limitations that includes a maximum of 52 consulting days per year and restricting the use of university property for personal consulting engagements.

From a supportive environment perspective, the University of British Columbia has a student-consulting group (UBC Consulting Group), and the university faculty profiles

have a section specifically for highlighting faculty-consulting experience. Overall, the University of British Columbia has positive views towards academic-consulting.

McGill University

Similar to the University of British Columbia, McGill University has a vague academic-consulting policy. The policy simply states that faculty must use their best judgement in defining projects that are considered ‘substantial’, or large enough to detract from everyday faculty duties. Faculty are asked to obtain approval, report on substantial projects and refrain from using university resources for such projects. However, faculty are permitted to include consulting activities as part of their consideration packages for promotion (McGill University, 2010).

Further to their open policy on academic-consulting, McGill University has a student run consulting group consisting of an advisory board of management faculty with consulting experience (McGill Business Consulting Group, 2014). Involved faculty in academic-consulting is not limited to the student-consulting group; in fact, as part of the school’s mandate, they aim to integrate business practice by involving faculty in consulting and industry research (McGill University, 2014). However, like other university CV structures examined, the faculty profiles do not highlight the faculty member’s specific consulting experience.

Western University

Western University has a similar profile to that of York University. There is no policy on academic-consulting, the school has a student-consulting group, and the university

profiles lack any mention of academic-consulting. Overall, it does not appear the school has any strong affiliations towards academic-consulting (Ivey School of Business, 2014).

Summary

Each university has their own specific policy and so generalizing all Canadian universities within a specific spectrum does not work. However, the majority of top Canadian business schools and Harvard Business School have policies regarding academic-consulting. Making the assumption that the top business schools are models for academic-consulting policies, some commonalities are found among all policies. Firstly, policies can act as a signal to the faculty that academic-consulting is encouraged and a part of the university culture. For example, many of the policies explicitly state the benefits of academic-consulting and the role it plays in the community. Secondly, by leaving the details vague, it allows the academics to make their own decisions while protecting the university, thus making academics feel less restricted in their practices. Lastly, limitations on the time permitted outside of academic duties can reduce the potential for conflict of interest. In fact, it can actually encourage academics if the limitation is worded in a positive manner; for example, “the academic may allocate up to 20 percent of their time to outside professional development activities”. Supporting this statement, one survey respondent stated the following: *“Universities can only inhibit such careers with overly restrictive policies. Allowing a reasonable amount of consulting, with a clearly specified limit (our institution allows for 25 days of external remuneration) makes it a standard and expected element of an academic career.”*

Universities are still distinctly focused on the outputs of publishing and research, but more and more business schools are recognizing the importance of industry experience in the skill development of students and faculty. However, as an extension to the review of university policies, the review of faculty profiles indicates that universities don't often showcase these accomplishments. In other words, while top universities recognize the benefits of academic-consulting, research and publishing continue to remain their primary focus. In order for academic institutions to truly value the benefits of consulting, consulting needs to become a deeply integrated part of their culture. This in and of itself is a large topic of research, but we conclude by reiterating the importance that a specific policy and culture regarding consulting plays in the success of academics in the role of consultant.

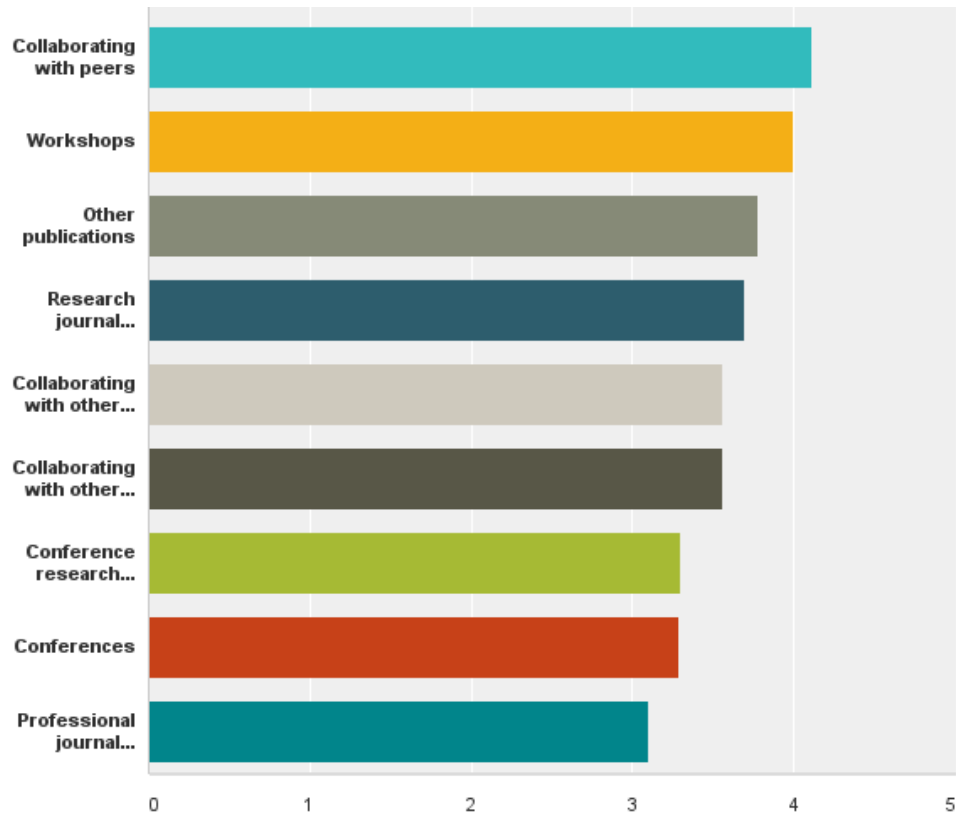
4.3 Knowledge Dissemination

Survey Responses

Participants of the survey were provided with a list of knowledge transfer mediums, where knowledge transfer was defined as the process for sharing, disseminating or acquiring knowledge. Knowledge transfer mediums ranged from professional journal publications to workshops to collaborating with consultants (please refer to Figure 2: Respondent Rating of Knowledge Sharing Mediums). Respondents were asked to rate the frequency of use for the knowledge transfer mediums on a scale of one to five, where a response of '1' represented not used at all, and a response of '5' represented used very frequently. Although each motivator was rated independently of one another, all motivators were presented together.

Unfortunately, the survey results did not provide any strong outcomes or findings as it relates to knowledge dissemination tools. The variance of the findings was quite large, and unfortunately the design of the option 'collaborating with peers' is too vague to understand the context of 'peer' for the particular respondent. Although there are no strong findings, there are some key observations that are worth discussion.

Figure 2: Respondent Rating of Knowledge Sharing Mediums



The high rating of peer collaboration indicates that collaborative knowledge share is a primary source of knowledge transfer. We can't determine the context of peer for the individual respondent, but we can make the assumption that peer collaboration includes a multitude of roles from academic to consultant to administrative. On the other hand, the Cambridge Dictionary defines a workshop as “a meeting of people to discuss and/or perform practical work in a subject or activity” (Cambridge University Press, 2014). Inherent to the nature of workshops is their collaborative learning environment. Based on these assumptions, we can conclude that collaborative environments are the most conducive environments for knowledge mobilization for academic-consultants.

Although this would require further investigation, it is interesting to note that this somewhat contradicts the existing literature that places much of the emphasis on academics using publishing as the most frequent knowledge sharing mediums. The survey results don't completely contradict this, as the other top ranked mediums were publishing oriented.

Table 8: Respondent Rating of Knowledge Share Mediums

	Percentage of Respondents per Rating						Average Rating	Variance
	1	2	3	4	5			
Collaborating with peers	0%	11%	11%	33%	44%	82%	1.98	
Workshops	11%	0%	11%	33%	44%	80%	3.11	
Other publications	10%	0%	20%	40%	30%	78%	2.74	
Research journal publications	20%	10%	10%	0%	60%	74%	5.62	
Collaborating with other academics	22%	0%	11%	33%	33%	71%	4.49	
Conference research publications	20%	0%	40%	10%	30%	66%	4.02	
Conferences	29%	0%	14%	29%	29%	66%	4.98	
Professional journal publications	20%	20%	10%	30%	20%	62%	4.18	
Collaborating with other consultants	0%	33%	0%	44%	22%	40%	2.72	

Interview Responses

Similar to the previous discussion on motivations, the structured interview questions did not include a question with regards to knowledge sharing mediums. However, the question was asked of those who discussed knowledge mobilization as part of their response to the interview questions. The following is a list of interview statements regarding the role of academic-consultants in knowledge mobilization:

- One interviewee felt very passionately about the important role that academic-consultants play in knowledge mobilization. *“Academic-consulting is a form of knowledge mobilization so it is a critical part for the use, creation and diffusion of knowledge between the academic and consulting community. Overall, consulting is key for knowledge mobilization.”*
- Another interviewee expressed the importance that diverse knowledge sources play in consulting engagements. *“When clients ask for the latest trends in management issues, having the academic toolkit of knowledge (i.e.: articles, documents, facilitation methods) to draw from can be very useful.”*
- On the other hand, one academic suggested that the benefit to academics is that they take an evidence-based approach to projects drawing knowledge from their many knowledge sources. Further suggesting that consultants don’t necessarily make decisions using evidence but rather using intuition. *“Management consultants often don’t know all that much and will recommend the same generic solution to multiple clients... Overall, academics can provide a higher level of knowledge.”*

One interviewee, a consultant who had hired a number of academics for consulting projects, did not agree with the construct that academic-consultants play an intermediary role in knowledge transfer between academic-consultants. Instead, the interviewee proposed that academics play a role in transferring subject matter expertise to the consulting community, while consultants play a role in educating academics on consulting procedures. Each plays a role in transferring specific types of knowledge to one another’s communities. Regardless, without the engagement of collaborative

academic-consulting projects, knowledge mobilization between the communities would be limited.

Summary

In summary, the survey results did not indicate that any of the knowledge sharing mediums is much more frequently used than others as the results varied substantially. Despite academics tendency to be motivated by and produce research-oriented publications, the results indicated that contrary to popular literature, collaborative knowledge sharing mediums are the most frequently used medium by academics and consultants alike.

This section is concluded with a discussion on knowledge. For many, knowledge is defined as information in action (O'Dell & Grayson, 2012). With this definition in mind, academics are pioneers of gathering, analyzing and presenting information. However, it isn't until this well-meaning information gets put into action that it is considered knowledge. In the words of one interviewee: *“Knowledge without structure and practical application is just information. It's not knowledge until it's put into use; not until it is in a form that can be used by others.”* There are many means for academics to put information into action; however, putting information into action by solving an organization's problem could be considered one of the most practical transformations of information to knowledge.

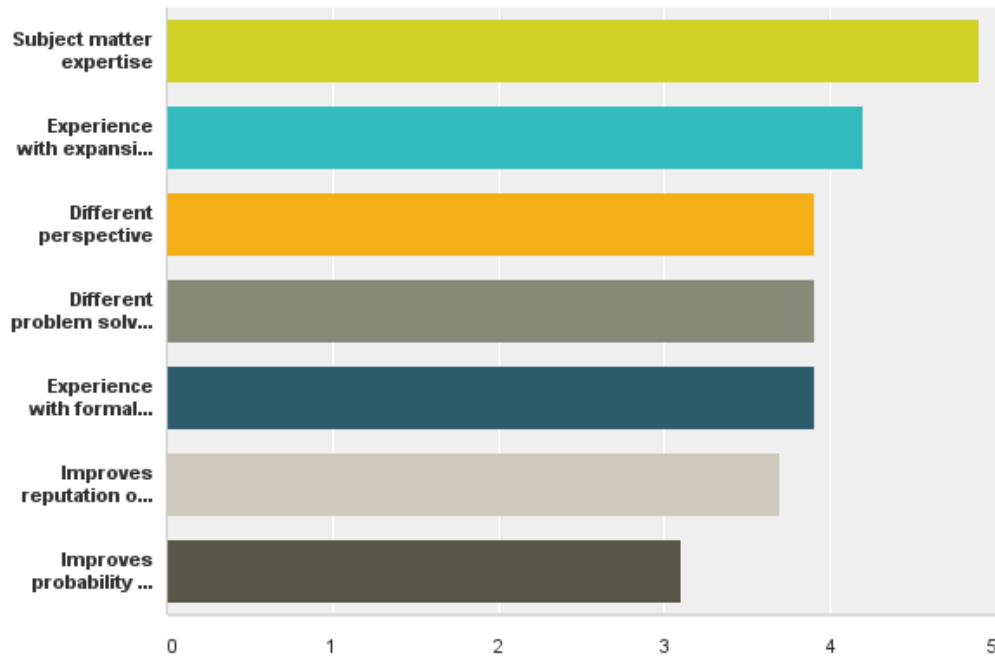
4.4 Academic-Consulting Benefits

Survey Responses

Participants of the survey were asked to rate a list of benefits to having academic-consultants involved in projects. Benefits ranged from subject matter expertise, to experience with expansive knowledge sources, to different perspectives (please refer to Figure 3: Respondent Rating of Academic-Consulting Benefits). Respondents were asked to rate the benefits on a scale of one to five, where a response of ‘1’ represented not beneficial, and a response of ‘5’ represented very beneficial. Although each benefit was rated independently of one another, all benefits were presented together.

The survey results clearly indicate that subject matter expertise is the primary benefit to including academic-consultants in consulting projects. In fact, the rating for this particular item was the most consistent of the survey, with the clearest consensus; 90% of survey respondents ranked subject matter expertise as a strong ‘5’, and the remaining 10% rated subject matter expertise as ‘4’. Clearly, the survey respondents felt that subject matter expertise is one of the most significant benefits to academic-consultants. The subsequent discussion from the interviews further acclaims these findings. As it relates to the other survey responses, the results indicate that the majority of the other benefits are to some degree or another viewed as beneficial by most respondents. However, the degree of variability in the responses indicates that the agreement on benefit depends on the individual. It is worth noting that ‘experience with expansive sources of knowledge’ is ranked the second highest – of which the importance was alluded to in the previous section.

Figure 3: Respondent Rating of Academic-Consulting Benefits



Interview Responses

Interview respondents were asked to speak to the benefits of academic-consulting, whether to the academic or to the project. As expected, all 10 interviewees included subject matter expertise in their response, further strengthening the evidence that subject matter expertise is perceived as the strongest benefit to academic-consulting. Additionally, survey respondents were asked a number of optional open-ended interview questions that included the topic of benefits. The following responses provide further examples on the topic:

- One academic-consultant speaks to the importance of leveraging your subject matter expertise to be a better consultant. *“To be a better consultant, you need to be forward thinking in your area of expertise. You need to be ahead of the curve and stay fresh.”*

- Three academic-consultants stated that in most instances, they did not actively seek consulting project work. Instead, they were invited to participate in projects specifically because of their subject matter expertise in various management areas from academia policy, marketing strategy to innovation policy. One survey respondent even agreed with this in stating: *“The best academic-consultants are the ones who never set out to be consultants, but whose research put them at the forefront of the area in which they are asked to consult.”*
- All other interviewees, consultants and academics alike, recognized the specific importance of subject matter expertise; *“Academic consultants bring a higher level of knowledge”*, *“One of the key advantages is a deep subject matter expertise”* and *“Academic consultants bring a greater depth to a subject area”*

Given the feedback from the literature review, it was not particularly surprising that subject matter expertise was ranked as the strongest benefit to academic-consulting. However, the new perspective that can be added to the research pool is that subject matter expertise is mutually beneficial; hence the strong ratings from both academic and consultant survey and interview respondents. Not only do projects gain the deep subject knowledge when academics are involved, but academics can use their subject matter expertise to carve a niche market and make a name for themselves in that area. Subject matter expertise is mutually beneficial to both project and academic, therefore making it one of the most important influencers of academic-consulting engagement.

Interviewees made additional comments regarding some of the other benefits for involving academics in consulting projects. There were a number of comments regarding the credibility that academics bring to consulting projects. Interestingly, this benefit

ranked quite low on the survey responses. However, this could be explained by the fact that the majority of survey respondents were mainly from academia, whereby the interview responses regarding credibility came primarily from consultants. These results may indicate that consultants see more value in the prestige and credibility that comes with an academic background than academics do.

- One consultant, responsible for co-ordinating academics on consulting projects, had such negative experiences that they felt the only benefits were that of credibility. *“The highly regarded academic on your roster is considered a star; one that you can sell, a tool to help you win a project, and one that you can charge a higher rate for. In fact, many times the client is told that the academic is involved more than they really are to help sell the project.”* This type of experience accentuates the credibility aspect that academics, specifically PhDs, bring to a project.
- Another consultant remarks that including an academic on your project team *“allows you to be a bit more competitive because of the prestige that comes with academic qualifications”*.
- All of the remaining consultants agreed that academics bring credibility to consulting projects to some degree or another, one of which is exemplified in the story that concludes this section.

There is one benefit discussed in the feedback from the interviewees that was not captured in the survey, which both academics and consultants alluded to. For many of the academics interviewed, consulting is not a frequent activity and so they are able to pick and choose which consulting projects that they want to become involved in. This, in

combination with some of the non-monetary motivations, gives the benefit that academics may be more passionately dedicated to a particular consulting project. For example:

- One academic remarked: *“We have the opportunity to pick and choose projects and so we [academics] do something because we genuinely want to help the organization. We want things to be better for them and we aren’t just in it for the money.”*
- Another academic compared their experience to that of consultants in stating: *“Unlike consultants, who often going into projects and do the same thing, we are present and really pay attention to the problems at hand.”*
- One consultant smiled as they recalled their experience working with a particular group of consultants: *“It was really great to see the academics get more involved in the project than just getting the job done. They were really just enjoying themselves and loved seeing their input being practically applied.”*

You will note that some of these responses are duplicated in the motivations feedback, for the reason that the motivation itself becomes an applied benefit. When an academic is motivated to contribute to a consulting project for the ability to practically apply their knowledge, the result is more engagement and dedication to the project than. This benefit will only be truly visible when the academic has the complementary motivation of being involved for the altruistic experience.

Relationship Analysis

There is an interesting linkage between the three aforementioned topics worth discussing. The following survey responses indicate a strong link between knowledge dissemination, subject matter expertise and motivations.

- One survey respondent remarked: *“Find a topic of interest and focus, and get out there and sell it to a relevant public.”*
- Another survey respondent noted similar opinions: *“Having published work to share on your area of expertise is a huge plus and will enhance your ability to charge higher fees.”*
- While another survey respondent stated: *“Become recognized as the best in the world in your field through journal publications early in career.”*
- Similarly, a survey respondent remarked: *“Present and teach a concept of relevance to a community group which includes people who hire consultants. Publish articles in the newspaper or general business publications that potential clients will read. Write a best selling business book if you really want to strike it big, and rich!”*

Combining these concepts, we can see a link between knowledge dissemination, subject matter expertise and financial motivations. Those that publish more frequently are more highly regarded as a subject matter expert in their area, and the more highly regarded, the greater the financial gains. However, what this linkage lacks is the identification of consulting experience. It is possible for an academic to be well regarded in their area of

expertise, but they could lack the fundamental consulting skillset. The following section further explores the topic of consulting experience and other important success factors.

Summary

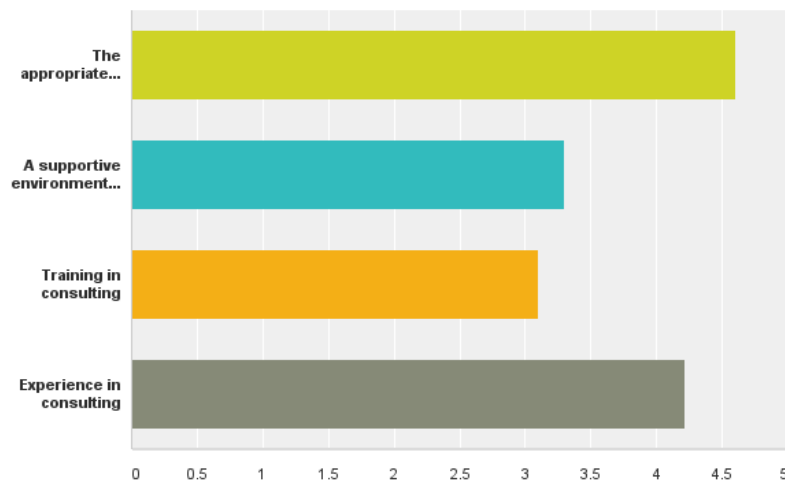
We conclude by recounting a story experienced by one of the interviewees that warns against benefits becoming drawbacks. One consultant spoke of their experience working with an academic on a healthcare related project. The consultant was asked to work with the academic, among others, to analyze the current state of the healthcare management systems. One part of the deliverables included recommendations on re-engineering, the subject matter expertise of the academic included in the project. The feedback from the consultant was that the overall experience was not a pleasant one. One of the main reasons was that the academic-consultant's core subject matter expertise was only one slice of the big picture. In fact, the academic-consultant's core subject matter expertise was in one particular area of process re-engineering that wasn't actually particularly useful to this project. Unfortunately, the academic was only focused on their one particular area of expertise and was unable to see the big picture of the project. It is for this reason that many of the academic's recommendations had to be rewritten by other team members.

You may be wondering why someone would be hired on the project if the academic's particular area of expertise was not particularly applicable to the project? Here's where another benefit comes to play: credibility. The academic was hired because they are well renowned in the academic community for their work in their particular area of expertise.

4.5 Success Factors of Academic Consultants

Survey respondents were asked to rate the importance of certain success factors in order for academics to be successful in a consulting role. The success factors included the appropriate project for the academic's expertise, a supportive university environment, training in consulting and experience in consulting. Respondents were asked to rate the success factors on a scale of one to five, where a response of '1' represented not important, and a response of '5' represented very important. The survey results indicated that selecting the appropriate project for the academic's expertise is one of the most important success factors; 60% of respondents rated this as '5', or very important, while the remaining respondents rated the importance of this success factor as '4'. Overall, the appropriate project rated a 92%, one of the highest scores in the survey.

Figure 4: Respondent Rating of Success Factors



Although seemingly obvious, a project that is considered appropriate for an academic is not necessarily obvious to those hiring academics. Project coordinators hiring academics must take the scope of the academic's subject matter expertise into consideration when

hiring an academic – academics work in a very particular niche area and trying to stretch their knowledge too thin will only cause problems.

Further to subject matter expertise, there are a number of other conditions that make a project the right fit for an academic. Specifically, ensuring that the academic is included on a team with members whose skills complement one another. During the interviews, there are two stories that further exemplify this importance:

- When asked what contributed to the success of an academic-consulting project, one academic remarked: *“All the people that were participating in the project were really interested in the topic and had a skillset that complemented each other. We all had a common goal to work towards.”* This speaks to the importance of team cohesiveness and setting a common goal.
- Another consultant stated the following with regards to the success of an academic-consulting project: *“It was about mutual respect for one another’s knowledge. I appreciated their subject matter expertise and they appreciated how I managed them and managed the project overall. We complemented each other’s strengths – there was intellectual stimulation from both groups.”*

Aside from the right project fit, there were other success factors identified from the survey. Although not rated as highly as project fit, similar results indicate that experience in consulting is also very important for the success of an academic. Overall, respondents rated experience in consulting as an 84%, with 70% of respondents rating it higher than a ‘4’, and no responses less than a ‘3’; these results indicate strong consensus on the importance of experience in consulting for success.

As with most things, the more we do them, the better we tend to become at them. The same can be said for management consulting, regardless of whether you are an academic, a student or a newly hired consultant. Specific to academic-consulting, one consultant drew on their working experience to identify three tiers of consultant styles that they typically encounter:

- (i) Pure Academic/Beginner Consultant: The pure academic has little to no experience with consulting. Based on the consultant's experience, the pure academics were more likely "*drawn to the consulting project because it speaks to something they are already doing*". They are motivated and excited by the project, but often lack the focus to stay within scope. They may seek to find solutions to problems that the client isn't necessarily interested in solving, purely because they are interested in solving them. Overall, they are motivated and dedicated to the project, but don't necessarily understand the consultant economics of the project.
- (ii) In-Between/Intermediate Consultant: The 'in-between' has some experience with consulting either in an academic-consulting capacity or as part of working teams at their university. They are typically in a supporting role rather than a lead, and never had experience in the delivery or client-facing aspect of the project. Based on the consultant's experience, "*many academics are comfortable being in the 'in-between' state because they don't like to see themselves as a project manager of their colleagues.*" You are likely to run into the same scoping issues as you do with pure academics, but they better understand the components and workings of a consulting project, such as

contracts and expectations. The consultant remarked: *“These are the most common types of academic-consultants that we use repeatedly – and most are happy staying in this tier of experience.”*

- (iii) Expert Consultant: The consultant described the expert academic-consultant as those that have done consulting projects before, typically have industry experience prior to academia and have performed consulting outside of the university confines. The benefit of the expert academic-consultants is that they had the skills of an effective consultant with the benefits of an academic; they could easily play the role of academic or consultant depending on the needs of the project. From a financial perspective, the project team didn't necessarily require the expertise of a consultant to guide the academic and finalize the deliverables, and so there is more return on investment from the efficiency of an expert academic-consultant. However, in the consultant's experience, he had only met a handful of consultant's that fit into this category.

This categorization of experience is specific to the interviewee's involvement with academic-consultants. It is only one person's conceptualization, and so we can't take this as truth. However, there are key characteristics that can be applied to academic-consulting in general. First, this feedback indicates that the level of experience will not only affect how the consultant performs within the consulting team, but how they fit into the project team in terms of deliverables and expectations. Secondly, those who can play the role of both consultant and academic exist, and are a very valuable asset from an execution and financial standpoint.

Lastly, training in consulting and a supportive university environment were ranked as the least important success factors. Although a supportive university environment was not ranked as an important success factor, the previous discussion on the affects of university culture indicate that an unsupportive university environment would be detrimental to success. In other words, having a university that supports or encourages academic-consulting may not have a noticeably positive affect on the success of the academic, but a university that does not support academic-consulting will have a negative affect on the success of the academic.

We conclude with a brief consultant story that highlights issues a project team can face when the consulting skillset of the academic is misaligned with the expected duties: *“We were bidding on a project that required an academic, specifically someone with a PhD, to be the lead of the project. Although we (the consultants) were running the project, we had an academic as the official lead of the project. This particular academic was very knowledgeable in the subject area of the project, but had very little industry experience, let alone consulting experience. The project team had made it through the first few rounds of the selection process and were onto the final round of selection. The final round consisted of a face-to-face interview with the client, whereby the project lead was to represent the project team and asked questions to demonstrate practical knowledge and experience. The client asked the academic fundamental questions about the project area, and the academic bombed the interview. In the end, we lost the project because the answers she gave were theoretical and didn’t demonstrate any knowledge that applied to real life situations.”*

4.6 Academic-Consulting Attitudes

Survey respondents were asked to give their personal opinion on the effectiveness of academics in the role of consultant. To answer this question, respondents were to select from the following answers: (i) not effective – they are not able to perform most of the consulting duties, (ii) somewhat effective – they are able to perform some of the consulting duties, and (iii) effective – they are able to perform consulting duties at the same level as any other consultant. 80% of respondents said that academics are somewhat effective in the role of consultant, while 20% of respondents said that academics consult to the same degree of effectiveness as a commercial consultant.

Given the aforementioned analysis, we conclude that the effectiveness of an academic can't be rated on such a scale. Instead, as is common in most management related topics, the true answer is: it depends. The effectiveness of a consultant depends on a number of factors, which ultimately is the purpose of this entire research – to identify those specific success factors.

However, what these survey results indicate is that the general attitude towards academic-consultants is likely more positive than other literature suggests, and that in general, most academic-consultants can play a role in consulting in some form or another. Based on the findings of our analysis, what that role is and what those success factors are is summarized in the following chapter.

Chapter 5: Recommendations to the Management Community

5.1 Recommendations for Project Coordinators and Clients

Recognize that motivations will differ from that of a commercial consultant

Although the results from the survey indicate that the profitability of academic-consulting is the strongest motivator for academic-consultants, there are other important motivations that need to be considered. Specifically, profitability does not motivate all academic-consultants. Based on the results from the research, what motivates all academic-consultants is the idea that engaging in consulting activities will help to build their profile in the business and academic community. In order to properly motivate the consultant for productivity and efficiency, it is important to find out what is the motivation for participating in the project. It is recommended that during the hiring process, project coordinators interview the academic on their purpose and desire for engaging in the project.

Understand the impact of the academic's university culture and policies

To some degree, an academic's university may place limitations or barriers on the academic. Specifically, there may be certain policies that prevent the academic from engaging in projects that are deemed a conflict of interest. Additionally, the university's reward structure will impact the consultant's motivational drive. It is recommended that during the hiring process, project coordinators interview the academic on whether or not there are academic policies in place, and what their impact is. Additionally, if required, project coordinators should ensure that there are contracts in place to protect the

confidentiality of the publications produced, as academics are often rewarded by their university based on publication track record.

Hire the right academic for the subject matter area required

Based on the survey results, subject matter expertise is the primary benefit to including academic-consultants in consulting projects. Therefore, project co-ordinators should be thorough and diligent in ensuring that the academic is the right fit for the project. Project coordinators hiring academics must take the scope of the academic's subject matter expertise into consideration when hiring an academic.

Gauge the academic's level of consulting experience

Project co-ordinators need to understand that there are some academics that have never had industry experience, let alone consulting experience. In such a case, they need to take extra caution in ensuring that these academics understand the terms of reference, scope, timelines and other primary consulting expectations. On the other hand, there are those who can play the role of both consultant and academic, and project co-ordinates should utilize these assets accordingly.

Create a project team that has complementary skillsets

In addition to understanding the experience level, project co-ordinators need to match this experience level with that of other project team members. If they have little experience in consulting, then do not expect the academic to be the lead of the project.

See the problem through a different lens

One of the primary benefits that academics bring to consulting projects is their unique perspective on analysis. There may be times that this perspective steers the academic out of scope, but there may be times that this helps to see the problem through a different lens. Where appropriate, project co-ordinators and clients should take hints from this differing perspective.

Create an environment of mutual respect

Project coordinators need to ensure that there is mutual respect between the project team members. Consultants need to respect that academics are hired on the project primarily for their subject matter expertise, while academics need to respect that consultants often know what is best for the project. It is recommended that project coordinators share the purpose for involving specific team members in a project so that all involved understand and respect the roles.

5.2 Recommendations for Consultants

Use consulting skills to facilitate and assist academics

One of the primary skillsets of an experienced consultant is their facilitation skills – the ability to guide discussion and problem solving among a group of team members. Consultants should use these facilitation skills to properly guide problem solving among academics. In doing so, consultants can ensure that academics are staying within scope, and bring academics back to a level practicality when they get too wrapped up in academic rigour. For example, one consultant jokingly asks academics “*Is that how you would explain it to your mother?*” to help guide the discussion in a practical direction.

Recognize that success is a two-way street

The success of a project depends on all team members, and so when an academic begins to derail or lose focus on the overall goal, the consultant has some responsibility in assisting the academic. Academics are typically hired for their subject matter expertise, and so consultants should use facilitation skills to help extract the required information from an academic in a form that is useful to the project.

5.3 Recommendations for Academics

Develop practical business communication skills

Being able to communicate in business style, whether written or spoken, is key to the success of any consultant. Organizations need to process information in the most efficient manner possible, and so overly detailed explanations full of academic jargon will not be appreciated. Communicating in a manner that is clear and concise is the key to effective business communication.

Develop strong facilitation skills

Facilitation skills, or the ability to guide a group of people towards solving a problem, are key to effective consulting. A good facilitator is one who ensures that the group adheres to active participation, common understanding and respect for other's contributions (Axner, 2014). Although not every academic consultants needs to play the role of facilitator, they need to understand the role that a facilitator plays and it's purpose in the overall goal of solving a client's problem.

Be humble

Academics are certainly well regarded, specifically those that have built a profile in a specific area of expertise. However, having expert knowledge in one particular field does not mean that you will know better than the client you are consulting. The client will understand their own organization better than any consultant, and so taking on an all-knowing attitude will only lead to conflict and mistrust.

5.4 Recommendations for Universities

Recognize the benefits of academic-consulting

Although a separate research project could be undertaken on the topic of university policy and culture, it is worth noting that the majority of top Canadian business schools recognize the benefits of supporting academic-consulting; mobilizing knowledge, diversifying knowledge and enhancing the learning experience were the most common benefits noted by those institutions. It is recommended that academic institutions remove the stigma related to academic-consulting and recognize the benefits it brings to the academic institution. To really recognize the benefits, academic institutions should incorporate consultancy as part of the reward structure and publically communicate the value and experience of its faculty.

Create an academic-consulting policy

It is recommended that academic institutions implement a policy on the topic of academic-consulting; simply having a policy in place signals the supportiveness towards academic-consulting. Based on the research, an effective policy is one that is lenient, but provides guidance on important topics such as conflict of interest and interference with academic duties. The guidelines should be vague enough so as not to be too limiting but provide enough detail so that the academic can properly use their best judgement. If time limitations are to be implemented, the limitation should be worded in a positive manner so as to actually support the academic; for example, “the academic may allocate up to 20 percent of their time to outside professional development activities”.

Support collaborative knowledge share

Based on the research results, we concluded that collaborative environments are the most conducive environments for knowledge mobilization for academic-consultants. Given that a primary goal of management schools is to generate knowledge that can be practically applied in organizations, universities should work towards supporting these collaborative knowledge environments. Specifically, by encouraging academic-consulting, the university is also encouraging knowledge dissemination between academia and industry.

Chapter 6: Conclusion

The previous section not only provided actionable recommendations to the stakeholders involved in academic-consulting engagements, but it served the purpose of summarizing many of the key results of the study. In short, the research results indicated that the success of academic-consultants depend on a number of factors including experience level, area of subject matter expertise, motivation drivers and university culture.

However, within our recommendations we concluded that success is not only the responsibility of the academic – the project co-ordinator plays an important role too. When assembling a consulting team, project co-ordinators must take the aforementioned factors into consideration to ensure that the academic's skillset complements the academic's assigned responsibilities. Much like an organization wouldn't hire a marketing expert to perform accounting duties, project co-ordinators should take the same care in hiring academics for consulting projects.

Furthermore, university culture is a critical success factor. The university culture sets the confines in which an academic is motivated or supported to perform consulting. Specifically, universities that are too restrictive in their policies on academic-consulting only set academics up for failure. On the other hand, top Canadian business schools implement lightweight policies that send a tone of encouragement and support, while protecting the integrity of the institution.

Although the success of an academic-consultant is affected by these factors, there is one success factor that is the most important of them all – and that is the ability to consult. Many of the qualms associated with academic-consultants, such as timeline or scope

creep, jargoned communication, and know-it-all attitudes are issues that general management consultants face, not just academics (Halamka, 2011). Academics may have certain predispositions and environmental factors that affect their success, but like any other consultant, the success of an academic-consultant depends on their ability to effectively consult. In general, consulting requires a very specific skillset that not everyone can acquire.

Future Research

Given the small amount of research on the topic, there is certainly an opportunity to expand on the research. This research study could be duplicated on a larger scale to provide the academic-consulting community with more concrete research findings. Moreover, each of the individual success factor topics could be further researched.

In particular, the area of university culture could be further explored to not only understand the impact that it has on academic-consultants, but to understand the impact that consulting has on the development of an improved management education program. Furthermore, there appears to be no research on the topic of universities that have highly supportive policies regarding consulting. Research into the affects of supportive policies could shed further light onto the benefits of tightly integrating consulting into the university culture and the impact it has on the university.

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Appendix A

Research Participation Plan

Step I: Invitation to Participants

The first step will be to send an e-mail invitation to Canadian business schools and known Canadian academic-consultants requesting the participation of Management Faculty in the research interview and/or survey. Please refer to Appendix B and Appendix C for the content of the e-mail invitation.

Step II: Reminder Invitation

For those who were originally contacted and did not respond to the invitation e-mail, a follow-up e-mail invitation will be sent as a reminder. Please refer to Appendix D for the content of the reminder invitation.

Step III: Obtain Informed Consent

Respondents to the invitation e-mail who fit the criteria of belonging to the Faculty of Management from a Canadian business school, or who have some degree of experience with academic-consultants will be contacted to participate in the research. Respondents will be provided further research details in the form of an informed consent form.

If the respondent agreed to participate in the interview, then they will be contacted to schedule a mutually convenient time to conduct the interview. If the respondent agreed to participate in the survey, they will be contacted with a link to the online survey.

Interview participants will be expected to provide e-mail confirmation of agreement to the informed consent form prior to conducting the interview. Survey participants will be provided with a copy of the informed consent form as part of the first step of the online survey and continuation of the survey assumes informed consent. Please refer to Appendix E and Appendix F for the content of the informed consent form for both the interview and survey.

Step IV: Conduct Research

Appendix G contains the structured interview questions that will be asked of the interview participants. Appendix H contains the online survey questions that will be asked of the survey participants. Additionally, the online survey can found online here: <https://www.surveymonkey.com/s/AcademicConsultinginCanada>.

Step V: Research Feedback

Once completed, participants will be sent a research feedback notification thanking them for participating and providing them with information on obtaining the research results. Please refer to Appendix I for the content of the research feedback letter.

Appendix B
Invitation for Research Participation – MBA Program Contacts

REB File # 14-156

Management Department, Saint Mary's University, Halifax Nova Scotia, B3H 3C3

**Examining Academic-Consulting in Canada:
Conditions for Successful Academic-Consulting Engagements**

Principle Investigator: Natasha D. Bodorik
Phone: (902) 219-1693, E-mail: nbodorik@gmail.com

Research Supervisor: Rosalie Fine
Phone: (902) 403-4014, E-mail: rosalie.fine@smu.ca

To whom it may concern,

As a current part-time Master of Business Administration student at Saint Mary's University, I am undertaking a Masters Research Project (MRP) on the topic of academic-consultants under the supervision of Professor Rosalie Fine. The purpose of the research is to provide the academic and management consulting community with a framework for better understanding the conditions that lead to successful consulting engagements involving academics.

I am requesting your assistance in helping to connect me with part-time or full-time management faculty at your university who are involved in both research and consulting, and who may be interested in participating in this research study. Interested faculty can voluntarily participate in this study in one or both of the following ways:

- (i) Participating in a 30 to 60-minute structure telephone interview, and/or;
- (ii) Completing a 15 to 20-minute survey conducted online.

Participation is open to those who fit the criteria of belonging to the Faculty of Management from a Canadian business school, or who have some degree of experience with academic-consultants. The survey will be completed entirely online, while the structured interview will be scheduled with willing participants between March 1st, 2014 and March 31st, 2014. All responses in the research study will be strictly confidential and participants may withdraw at any time.

If possible, a list of academic-consultants at your university whom I could contact would be greatly appreciated. Otherwise, interested faculty may contact me directly via e-mail at nbodorik@gmail.com.

If you have any other further questions or concerns, please don't hesitate to contact me via e-mail at nbodorik@gmail.com or my academic research supervisor, Rosalie Fine, via e-mail at rosalie.fine@smu.ca.

Appendix C
Invitation for Research Participation – Academic-Consultant Contacts

REB File # 14-156

Management Department, Saint Mary's University, Halifax Nova Scotia, B3H 3C3

**Examining Academic-Consulting in Canada:
Conditions for Successful Academic-Consulting Engagements**

Principle Investigator: Natasha D. Bodorik
Phone: (902) 219-1693, E-mail: nbodorik@gmail.com

Research Supervisor: Rosalie Fine
Phone: (902) 403-4014, E-mail: rosalie.fine@smu.ca

Dear [*Insert Academic-Consultant Name*],

As a current part-time Master of Business Administration student at Saint Mary's University, I am undertaking a Masters Research Project (MRP) on the topic of academic-consultants under the supervision of Professor Rosalie Fine. The purpose of the research is to provide the academic and management consulting community with a framework for better understanding the conditions that lead to successful consulting engagements involving academics.

I am inviting you to contribute to this research by participating in one or both of the following ways:

- (i) Participating in a 30 to 60-minute structure telephone interview, and/or;
- (ii) Completing a 15 to 20-minute survey conducted online.

Participation is open to those who fit the criteria of belonging to the Faculty of Management from a Canadian business school, or who have some degree of experience with academic-consultants. The survey will be completed entirely online, while the structured interview will be scheduled with willing participants between March 1st, 2014 and March 31st, 2014. All responses in the research study will be strictly confidential and participants may withdraw at any time.

If you have any other further questions or concerns, please don't hesitate to contact me via e-mail at nbodorik@gmail.com or my academic research supervisor, Rosalie Fine, via e-mail at rosalie.fine@smu.ca.

Appendix D
Reminder Invitation for Research Participation

REB File # 14-156

Management Department, Saint Mary's University, Halifax Nova Scotia, B3H 3C3

**Examining Academic-Consulting in Canada:
Conditions for Successful Academic-Consulting Engagements**

Principle Investigator: Natasha D. Bodorik
Phone: (902) 219-1693, E-mail: nbodorik@gmail.com

Research Supervisor: Rosalie Fine
Phone: (902) 403-4014, E-mail: rosalie.fine@smu.ca

To whom it may concern,

A request for participating in my research study was sent to you on [*Insert Date*].

As a reminder, the purpose of the research is to provide the academic and management consulting community with a framework for better understanding the conditions that lead to successful consulting engagements involving academics. This research study is not possible without willing participants to share their knowledge and experience in this area.

Participants can contribute to this research by participating in one or both of the following ways:

- (i) Participating in a 30 to 60-minute structure telephone interview, and/or;
- (ii) Completing a 15 to 20-minute survey conducted online.

Participation is open to those who fit the criteria of belonging to the Faculty of Management from a Canadian business school, or who have some degree of experience with academic-consultants. The survey can be completed online by visiting the link here: <https://www.surveymonkey.com/s/AcademicConsultinginCanada>. The structured interview will be scheduled between March 1st, 2014 and March 31st, 2014. All responses in the research study will be strictly confidential and participants may withdraw at any time.

Participation in this survey is greatly appreciated. If you, or anyone you know, are interested in participating in this research study, please contact me via e-mail at nbodorik@gmail.com.

If you have any other further questions or concerns, please don't hesitate to contact me via e-mail at nbodorik@gmail.com or my academic research supervisor, Rosalie Fine, via e-mail at rosalie.fine@smu.ca.

Appendix E
Structured Interview – Informed Consent Form

REB File # 14-156

Management Department, Saint Mary's University, Halifax Nova Scotia, B3H 3C3

**Examining Academic-Consulting in Canada:
Conditions for Successful Academic-Consulting Engagements**

Principle Investigator: Natasha D. Bodorik
Phone: (902) 219-1693, E-mail: nbodorik@gmail.com

Research Supervisor: Rosalie Fine
Phone: (902) 403-4014, E-mail: rosalie.fine@smu.ca

SECTION I: SUMMARY OF THE STRUCTURED INTERVIEW

INTRODUCTION

As a current Master of Business Administration student at Saint Mary's University, it is part of program requirements to complete a major research project. Conducted under the supervision of Rosalie Fine, I am inviting you to voluntarily participate a study of Canadian academic-consultants.

PURPOSE OF THIS RESEARCH

The purpose of this research is to review and expand on the current literature that exists on academic-consulting by doing an in-depth analysis on the conditions and complexities that contribute to the success or failure of academic-consulting engagements.

WHO IS ELIGIBLE TO TAKE PART?

An academic-consultant is defined as any part-time or full-time university faculty member that partakes in consulting engagements either independently or as part of a university engagement. Participation is open to those who fit the criteria of belonging to the Faculty of Management from a Canadian business school, and who have some degree of experience with academic-consultants. Additionally, full-time consultants with experience collaborating on a consulting project with an academic-consultant are eligible to participate in this study.

WHAT DOES PARTICIPATING MEAN?

This study would involve a 45 to 60-minute interview with the researcher. The interview would take place via the most convenient conversational medium for the interviewee such as telephone, in-person, or teleconference. The interview would be scheduled at a mutually convenient time between the dates of March 1st, 2014 and March 31st, 2014.

WHAT ARE THE POTENTIAL BENEFITS OF THIS RESEARCH?

The benefits of this study include the promotion of our understanding of academic-

consulting. Furthermore, the promotion of the conditions of academic-consulting which create positive benefits to both the academic and consulting communities.

WHAT ARE THE POTENTIAL RISKS FOR PARTICIPANTS?

There are no foreseeable risks associated with participating in this study.

HOW CAN I WITHDRAW FROM THIS STUDY?

Your participation in this study is completely voluntary. You can decline to answer any question or withdraw from the study at any time during the interview without any consequences. All information collected up to the point of your withdrawal from the interview will be retained for analysis only. If you are not comfortable with having your data used, it will be destroyed and will not be included in the research.

HOW WILL MY PERSONAL INFORMATION BE RECORDED AND SHARED?

Upon commencement of the interview, you will be given a unique, anonymous profile identifier (UAID). Any and all information recorded and stored will be referenced using the UAID. There will never be stored or recorded information linking the UAID to any of your personal identifying information, such as name, e-mail or employer.

Each profile will include the following descriptors: (i) capacity as an academic, consultant or academic-consultant, (ii) what type of institution they are primarily employed (consulting firm, university, independent or other), (iii) number of years in their respective roles (academic, consulting or academic-consulting). Other than those personal identifiers, no other personal identifying information will be recorded or shared. All other personally identifying information obtained in this study will be kept strictly confidential, and will never be linked to the UAID.

Other type of information collected will include anecdotal examples, preferences and experience related to the topic of this study. Furthermore, the results of this study will primarily be presented in summary format using codification. If individual anecdotal quotes are used, it will be referenced using the UAID.

HOW CAN I RECEIVE ACCESS TO THE STUDY RESULTS?

Upon the conclusion of the study, the research report will be made available to interested participants. You may indicate your interest in receiving this information at any time before or after your interview.

HOW CAN I FIND OUT MORE ABOUT THIS STUDY?

If you require any additional information about this study, please don't hesitate to contact the principle investigator or research supervisor (contact details above).

SECTION II: CERTIFICATION and SIGNATURE OF AGREEMENT

The Saint Mary's University Research Ethics Board has reviewed this research. If you have any questions or concerns about ethical matters or would like to discuss your rights as a research participant, you may contact the Chair of the Research Ethics Board at ethics@smu.ca or 420-5728.

Examining Academic-Consulting in Canada: Conditions for Successful Academic-Consulting Engagements

I understand what this study is about, appreciate the risks and benefits, and that by consenting I agree to take part in this research study and do not waive any rights to legal recourse in the event of research-related harm.

**An affirmative reply to the email containing the consent letter and/or participation in the interview will be taken as your confirmation of information consent.
Alternatively, you can sign and date the section below.**

Participant

Signature : _____
Name (Printed) : _____
Date : _____

Principle Investigator

Signature : _____
Name (Printed) : _____
Date : _____

Please keep one copy of this form for your own records.

Appendix F
Online Survey – Informed Consent Form

REB File # 14-156

Management Department, Saint Mary's University, Halifax Nova Scotia, B3H 3C3

**Examining Academic-Consulting in Canada:
Conditions for Successful Academic-Consulting Engagements**

Principle Investigator: Natasha D. Bodorik
Phone: (902) 219-1693, E-mail: nbodorik@gmail.com

Research Supervisor: Rosalie Fine
Phone: (902) 403-4014, E-mail: rosalie.fine@smu.ca

SECTION I: SUMMARY OF THE ONLINE SURVEY

INTRODUCTION

As a current Master of Business Administration student at Saint Mary's University, it is part of program requirements to complete a major research project. Conducted under the supervision of Rosalie Fine, I am inviting you to voluntarily participate a study of Canadian academic-consultants.

PURPOSE OF THIS RESEARCH

The purpose of this research is to review and expand on the current literature that exists on academic-consulting by doing an in-depth analysis on the conditions and complexities that contribute to the success or failure of academic-consulting engagements.

WHO IS ELIGIBLE TO TAKE PART?

An academic-consultant is defined as any part-time or full-time university faculty member that partakes in consulting engagements either independently or as part of a university engagement. Participation is open to those who fit the criteria of belonging to the Faculty of Management from a Canadian business school, and who have some degree of experience with academic-consultants. Additionally, full-time consultants with experience collaborating on a consulting project with an academic-consultant are eligible to participate in this study.

WHAT DOES PARTICIPATING MEAN?

This study would involve a 15 to 20-minute online survey of approximately twenty multiple-choice questions. The survey takes place online using the online survey tool, Survey Monkey. The online survey will be available for participation between the dates of March 1st, 2014 and March 31st, 2014.

WHAT ARE THE POTENTIAL BENEFITS OF THIS RESEARCH?

The benefits of this study include the promotion of our understanding of academic-consulting. Furthermore, the promotion of the conditions of academic-consulting which create positive benefits to both the academic and consulting communities.

WHAT ARE THE POTENTIAL RISKS FOR PARTICIPANTS?

There are no foreseeable risks associated with participating in this study.

HOW CAN I WITHDRAW FROM THIS STUDY?

Your participation in this study is completely voluntary. You can decline to answer any question or withdraw from the study at any time during the survey by exiting the survey.

HOW WILL MY PERSONAL INFORMATION BE RECORDED AND SHARED?

All survey responses will be collected online using Survey Monkey. Personal information, such as name, e-mail or employer, will not be collected in the survey; only information pertaining to the topic of this study will be gathered. Furthermore, the results of this study will be presented in summary format of all responses, with no individual responses being referenced.

Please note that the online survey is hosted by “Survey Monkey” which is a web survey company located in the United States of America. All responses to the survey will be stored and accessed in the United States of America. This company is subject to United States Laws, in particular, to the United States Patriot Act/Domestic Security Enhancement Act that allows authorities access to the records that your responses to the questions will be stored and accessed in the United States of America. The security and private policy for Survey Monkey can be viewed at <https://www.surveymonkey.com/mp/policy/terms-of-use/>

HOW CAN I RECEIVE ACCESS TO THE STUDY RESULTS?

Upon the conclusion of the study, the research report will be made available to interested participants. You may indicate your interest in receiving this information at any time before or after your interview.

HOW CAN I FIND OUT MORE ABOUT THIS STUDY?

If you require any additional information about this study, please don't hesitate to contact the principle investigator or research supervisor (contact details above).

SECTION II: CERTIFICATION and CONFIRMATION OF CONSENT

The Saint Mary's University Research Ethics Board has reviewed this research. If you have any questions or concerns about ethical matters or would like to discuss your rights as a research participant, you may contact the Chair of the Research Ethics Board at ethics@smu.ca or 420-5728.

I understand what this study is about, appreciate the risks and benefits, and that by consenting I agree to take part in this research study and do not waive any rights to legal recourse in the event of research-related harm.

Continuing with the Survey Monkey online survey will be taken as your confirmation of informed consent.

Appendix G

Structured Interview

REB File # 14-156

Management Department, Saint Mary's University, Halifax Nova Scotia, B3H 3C3

Examining Academic-Consulting in Canada: Conditions for Successful Academic-Consulting Engagements

Principle Investigator: Natasha D. Bodorik
Phone: (902) 219-1693, E-mail: nbodorik@gmail.com

Research Supervisor: Rosalie Fine
Phone: (902) 403-4014, E-mail: rosalie.fine@smu.ca

SECTION I: DEFINING THE PARTICIPANT'S ROLE IN THE COMMUNITY

1. Please describe your current role in the academic and management consulting community.
2. Please describe a positive academic-consulting experience.
 - a. What condition contributed most to making that experience positive?
 - b. How did the university environment affect the experience?
 - c. How did the competencies of the academic-consultant affect the experience?
 - d. How did the project team affect the experience?
 - e. What was the client's reaction to the overall project?
3. Please describe a negative academic-consulting experience.
 - a. What condition contributed most to making that experience negative?
 - b. How did the university environment affect the experience?
 - c. How did the competencies of the academic-consultant affect the experience?
 - d. How did the project team affect the experience?
 - e. What was the client's reaction to the overall project?
4. In your opinion, what are the benefits of involving an academic in consulting? Please provide an example.
5. In your opinion, what are the drawbacks of involving an academic in consulting? Please provide an example.
6. In your opinion, what makes an academic a successful and effective consultant?
7. Think of the academic-consultant that you most respect. What about this person makes you respect them?

Appendix H Online Survey

REB File # 14-156

Management Department, Saint Mary's University, Halifax Nova Scotia, B3H 3C3

Examining Academic-Consulting in Canada: Conditions for Successful Academic-Consulting Engagements

Principle Investigator: Natasha D. Bodorik
Phone: (902) 219-1693, E-mail: nbodorik@gmail.com

Research Supervisor: Rosalie Fine
Phone: (902) 403-4014, E-mail: rosalie.fine@smu.ca

PART I: DEFINING THE PARTICIPANT'S ROLE

1. In what part of Canada do you reside?
 - a. Atlantic Canada
 - b. Central Canada
 - c. Western Canada
 - d. Northern Canada

2. In what part of Canada are you primarily employed?
 - a. Atlantic Canada
 - b. Central Canada
 - c. Western Canada
 - d. Northern Canada

3. A management consultant provides advisory services related to management activities to businesses or individuals. Have you ever been the provider of management consulting services?
 - a. Yes
 - b. No

Note: If the respondent has never participated in any management consulting activities, then the respondent is not the target audience and therefore we end the survey.

4. On average, how often do you provide management consulting services?
 - a. Daily
 - b. Weekly
 - c. Monthly
 - d. Yearly or Less

5. A management academic is defined as a teacher, scholar, instructor or researcher in an institute of higher education (i.e.: college or university), specifically in the management department. Have you ever been the provider of any management academic services at an institute of higher education?
 - a. Yes
 - b. No

6. On average, how often do you perform management academic duties?
 - a. Daily
 - b. Weekly
 - c. Monthly
 - d. Yearly or Less
 - e. Never

7. Please select all the academic activities that you perform or have performed.
 - a. Leading workshops or seminars
 - b. Guest lectures
 - c. Teaching courses
 - d. Supervising research
 - e. Conducting research

- f. Other
8. Have you ever been a management academic on a consulting project where you were in the role of management consultant? Or, have you ever worked with a management academic on a consulting project where the academic was in the role of management consultant?
- a. I have acted as a management academic on a consulting project
 - b. I have worked with a management academic on a consulting project
 - c. I have neither acted as or work worked with a management academic on a consulting project.

PART II: CONSULTING ENVIRONMENT

1. Please rate the following motivators for participating in management consulting on a scale of 1 to 5 (or N/A).
- a. Profitable venture
 - b. Complements research
 - c. Complements teaching
 - d. Enhances knowledge in the management field
 - e. Stay current on contemporary management issues
 - f. Builds profile in the business and academic community
 - g. Other (please expand)
2. Which of the following motivators is most important to you?
- a. Profitable venture
 - b. Complements research
 - c. Complements teaching
 - d. Enhances knowledge in the management field
 - e. Stay current on contemporary management issues
 - f. Builds profile in the business and academic community

- g. Other (please expand)

PART III: ACADEMIC ENVIRONMENT

1. On a scale of 1 to 10 (or N/A), how supportive is your university environment of academics engaging in management consulting?

Note: If the respondent answers N/A to this question, then the respondent is not involved in academia and therefore skips to the following section.

2. Keeping in mind your answers to the previous question, please indicate which of the following contributes to the supportiveness of your university and/or the success of a consulting project.

Having no specific university regulations on the subject matter of university faculty who are involved with consulting contributes to the supportiveness of my university and/or the success of a consulting project.

- a. True
- b. False
- c. N/A – My university has specific regulations.

Having specific university regulations that place limitations on faculty consulting contributes to the supportiveness of my university and/or the success of a consulting project.

- a. True
- b. False
- d. N/A – My university has no specific regulations that place limitations on faculty consulting.

Having specific university regulations that encourage faculty consulting contributes to the supportiveness of my university and/or the success of a consulting project.

- a. True
- b. False
- e. N/A – My university has no specific regulations that encourage faculty consulting.

3. Have you ever found yourself in a situation where your consulting duties conflicted with your university duties?
 - a. Yes
 - b. No

PART IV: KNOWLEDGE SHARING

1. The following are examples of mediums for two-way knowledge transfer. Please rank the following on a scale of 1 to 5 (or N/A) on frequency of use. Please provide examples where possible. For example, you might include 'local newspaper' as an example for the 'Other publications' category.
 - a. Professional journal publications
 - b. Research journal publications
 - c. Conference research publications
 - d. Other publications
 - e. Conferences
 - f. Workshops
 - g. Collaborating with peers
 - h. Collaborating with other academics
 - i. Collaborating with other consultants
 - j. Other

PART V: OPINION ON ACADEMIC CONSULTANTS

1. Please rate the following benefits of having an academic in the role of consultant from 1 to 5, where '1' represents 'not beneficial' and '5' represents 'very beneficial'.
 - a. Subject matter expertise
 - b. Different perspective
 - c. Different problem solving approach

- c. Experience with expansive sources of knowledge (e.g.: journals, conferences, students, etc.)
 - d. Experience with formal research
 - e. Improves reputation of project work
 - f. Improves probability of being awarded project work
 - g. Other (please expand)
2. Please rate the importance of following pre-requisites that affect the success and effectiveness of an academic in the role of consultant from 1 to 5, where '1' represents 'not important' and '5' represents 'very important'.
- a. The appropriate project for the academic's expertise
 - b. A supportive environment (e.g.: university, consulting firm, team)
 - c. Training in consulting
 - d. Experience in consulting
 - e. Other (please expand)
3. Given your personal experience, how effective do you think academics are in the role of consultant?
- a. Not effective: They are not able to perform most of the consulting duties.
 - b. Somewhat effective: They are able to perform some of the consulting duties.
 - c. Effective: They are able to perform consulting duties at the same level as any other consultant.

PART VI: OPTIONAL OPEN-ENDED QUESTIONS

1. In your experience, what are the most important foundational steps for an academic to take if they want build an academic-consulting career?
2. Furthermore, what advice can you provide to academics that want to build an academic-consulting career?

3. In your opinion, what role do you think academic institutions play in the success of academics building an academic-consulting career?
4. Given your experience, do you think academics can successfully make the transition to consultants? Please feel free to share any stories or examples that may complement your opinion.
5. Is there any other advice, recommendations or stories you would like to share related to the topic of academic-consulting? If so, please elaborate.

Appendix I Feedback Letter

REB File # 14-156

Management Department, Saint Mary's University, Halifax Nova Scotia, B3H 3C3

Examining Academic-Consulting in Canada: Conditions for Successful Academic-Consulting Engagements

Principle Investigator: Natasha D. Bodorik
Phone: (902) 219-1693, E-mail: nbodorik@gmail.com

Research Supervisor: Rosalie Fine
Phone: (902) 403-4014, E-mail: rosalie.fine@smu.ca

Dear [*Participant*],

The purpose of this research is to provide the academic and management consulting community with a framework for better understanding the conditions that lead to successful consulting engagements involving academics. This research study is not possible without your willingness to share your knowledge and experience in this area, and for that, I am truly thankful for your participation.

If you would like a summary of the results, please let me know by providing me with your email address. Once the study is completed, a summary of the research findings will be distributed to interested participants. This expected completion of this study is May 1st 2014, with research findings distributed shortly thereafter.

As with all Saint Mary's University projects involving human participants, this project was reviewed by the Saint Mary's University Research Ethics Board. Should you have any comments or concerns about ethical matters or would like to discuss your rights as a research participant, please contact the Chair of the Research Ethics Board at 902-420-5728 or ethics@smu.ca.

Thank you again for your participation and contribution to the study.

Kindly,

Natasha Bodorik
Graduate Student
Sobey MBA | Saint Mary's University
(p) 902.219.1693 | (e) nbodorik@gmail.com
LinkedIn: <http://ca.linkedin.com/in/natashabodorik/>



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UNIVERSITY SINCE 1802

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T 902.420.5534

F 902.420.5561

Research Ethics Board Certificate Notice

The Saint Mary's University Research Ethics Board has issued an REB certificate related to this thesis. The certificate number is: 14-156 .

A copy of the certificate is on file at:

Saint Mary's University, Archives
Patrick Power Library
Halifax, NS
B3H 3C3

Email: archives@smu.ca

Phone: 902-420-5508

Fax: 902-420-5561

For more information on the issuing of REB certificates, you can contact the Research Ethics Board at 902-420-5728/ ethics@smu.ca .