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## Introduction

Welcome to this issue of the ***Business Education Innovation Journal***.

The purpose of this journal is to assemble researched and documented ideas that help drive successful learning and motivate business students to learn. The intention is to draw ideas from across both methods and disciplines and to create a refereed body of knowledge on innovation in business education. As a result, the primary audience includes business education faculty, curriculum directors, and practitioners who are dedicated to providing effective and exciting education.

We invite you to read about innovations published and apply in your classroom. We also encourage you to develop your original creative ideas, prepare an article, and submit for review.

This particular issue includes a number of interesting classroom innovations in diverse areas.

Peter J. Billington  
*Editor*

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# Lecture Capture – An Emerging and Innovative Technology with Multiple Applications for Business Schools

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## ABSTRACT

Student-athletes miss a substantial number of classes due to their participation in NCAA athletic competitions. In order to alleviate this problem, our university, led by business school faculty members, implemented a new program using lecture capture technology. The program was successful not only for student-athletes, but also for non student-athletes and faculty. Further, as business school faculty became more familiar with lecture capture, it became apparent that it could be used in a variety of ways that could improve student learning and the quality of the college's courses and programs. This paper discusses the missed class problem, lecture capture, and some of the many applications of lecture capture in a business school setting.

**Keywords:** Lecture capture, technology, recordings, missed classes, student-athletes

## INTRODUCTION

Student absences are the bane of many faculty members. Yet, there are times when absences are legitimate and when students would prefer not to be away from their classes. Athletic competitions, religious holidays, illness and jury duty are all legitimate reasons why students miss class. In recent years, the impact of missed classes on student-athlete academic performance has become a major concern to the National Collegiate Athletic Association (NCAA). In addressing this concern, the Association's membership, comprised of college and university presidents, recently adopted a number of regulations designed to decrease the number of missed classes for student-athletes. One such regulation that went into effect this year was that a faculty oversight committee at each member school has to approve their school's Men's Basketball schedule before the start of each semester taking into account the number of classes missed by each student-athlete. Another new regulation is that NCAA member schools must now document the number of missed classes for each student-athlete in each sport. Additionally, numerous colleges and universities have established their own guidelines regarding the maximum number of missed classes that student-athletes are allowed to have within a particular semester before seeking a waiver from a faculty oversight committee.

Compounding this problem for our university is that it recently joined a new athletic conference that required student-athletes to travel further for competition. This, in turn, increased the number of days that student-athletes were away from campus. In hopes of alleviating this problem, the university invested in lecture capture technology. A pilot program was instituted during the Fall 2009 semester, and, due to the positive results of this initiative, the university decided to implement the program with funding on a full-scale basis beginning with the Spring 2010 semester. The Dean of the College of Business Administration (CBA), the Provost, the Director of Athletics and the Senior Vice-President of Enrollment Management and Student Activities provided funding for the program. The widespread interest and support for this initiative was due to its perceived value not just to student-athletes, but also to non student-athletes and to faculty members. Further, it soon became apparent to the Dean of the CBA that lecture capture technology could improve student learning while at the same time enabling CBA faculty and staff to better communicate with their students, some of whom are overseas on a study abroad program or working in an internship or a co-op position far away from the main campus. The CBA quickly moved from using lecture capture to address the student-athlete's missed class problem to using it in a variety of ways to enhance learning for all students.

In the next section, lecture capture technology is described. This section is followed by a discussion of the missed class problem, how lecture capture was used to alleviate this problem, and how the use of lecture capture was

expanded within the business school. The paper concludes with a discussion of the lessons learned in initiating this program to a faculty with widely divergent comfort levels with technology.

## LECTURE CAPTURE

Lecture capture is a methodology that is used to record a class session using audio, video, PowerPoint and computer screen activity in any combination. Professors have the option to edit material that is presented in class and to add new material to the already completed class session. Lectures are automatically uploaded to a database, archived and made available to students through a personalized login system such as Blackboard. The lectures are available online and there are applications for the iPhone, iPod touch and iPad. Advanced systems provide students with bookmark, chat and search capabilities. In addition, faculty members have the option of allowing students to view the class live as it is occurring. For example, a student-athlete could listen to a missed class using their iPhone while travelling on a bus to an athletic competition. Lecture capture is also of benefit to those students who attend the recorded class as they now have the ability to revisit the class session at a later time in order to obtain a complete and accurate set of notes or to review a topic discussed in class. These features all help to improve student learning and have been found to be especially beneficial for students whose native language is not English. Overall, the system is extremely easy to use for both faculty and students.

According to a Datamonitor marketing research report (TechSmith Corporation, 2010), lecture capture is one of the fastest growing sectors in educational technology and one in which vendors are highly innovative. The report states that the reasons for this are (i) many classrooms are now equipped for the introduction of lecture capture, (ii) investment in hardware technology is minimal and (iii) ease of use. For example, for its new building, Temple's Fox Business School recently announced that it has launched a new era of learning by providing each of its classrooms with state-of-the-art lecture capture technology.

## LECTURE CAPTURE AND THE MISSED CLASS PROBLEM

Through no fault of their own, student-athletes may miss a relatively large number of classes in a semester and this has the potential to adversely affect their overall learning and academic performance. The problem occurs even though student-athletes and their advisors explicitly consider the number of classes likely to be missed when selecting individual courses. Compounding this problem is that, in many cases, these missed classes occur within a relatively short time period rather than throughout the entire semester. Table 1 presents the number of classes that were missed in particular courses by student-athletes at our university due to athletic competitions in a recent semester.

**Table 1: Number of Missed Classes by Student-Athletes in Particular Courses**

Number of missed classes	Number of courses
1	1
2	12
3	60
4	40
5	59
6	7
7 or more	7
N=113	

During the semester, there were 113 courses in which a student-athlete missed four or more class sessions due to athletic competition. The maximum number of class sessions missed in a single course by a student-athlete was nine. Those with a relatively large number of missed classes typically could not take the course at any other time either because multiple sections were not offered or because the selected course conflicted with either another course or

their practice schedule. In essence, the student-athlete had no choice except to take the course at its designated time and in these situations lecture capture is especially important.

The lecture capture project team consisted of the Director of the Office of Student-Athlete Support Services, the Associate Dean of the Undergraduate Business programs, the University's Faculty Athletics Representative who was also a faculty member in the CBA, and the Director and the Senior Manager of the University's Department of Academic Technology Services. This project team considered a variety of alternative lecture capture systems for possible use. These included Panopto, Echo 360, MediaPointe, TechSmith and Tegrity. The systems were quite similar and a decision was made to pilot a lecture capture system for the student-athlete population using Tegrity software during the Fall 2009 semester. While this program was specifically designed to assist student-athletes, all students enrolled in a course had the same access to the recordings.

The initial problem facing the project team was to gain faculty support for the lecture capture program. Preliminary discussions revealed that faculty had mixed views regarding the use of this new technology. While some faculty members were supportive of using lecture capture only for their student-athletes, there were others who wanted to use the technology in all of their courses for all of their students. On the other hand, there were faculty members who were opposed to using this technology under any circumstance. The reasons for not wanting to use lecture capture were varied, but a major concern was an expected drop in class attendance. However, the results of numerous studies suggest that lecture capture has only a slight negative effect on attendance. The research also indicates that this slight decline in attendance does not translate into lower performance. This is because the negative effects associated with slightly lower attendance are more than offset by the positive effects associated with online access (Traphagan et al, 2010; Harpp et al, 2009; Mentch, 2008; and Brotherton and Aboud, 2004). Additional studies have found no significant association between attendance and download frequency; in part this is because students strongly prefer the actual class sessions to the recorded class sessions (White 2009; Bryans, Bongey et al 2006; and Grabe and Christopherson 2008). As one team member reminded us many times, it is much more pleasant to be in class with other students than to watch a lecture alone at ten o'clock at night. Other faculty concerns over using lecture capture included not wanting to give special treatment to student-athletes, not knowing how the recordings might eventually be used, and believing that the way they taught their course made it inappropriate for recording.

Due to this wide range of faculty opinions and prior to the start of the Fall 2009 semester, members of the project team met individually with various college deans, associate deans and department chairs in order to inform them about the program. During these meetings, the project team communicated the nature of the problem confronting student-athletes, indicated how lecture capture could help alleviate this problem and discussed various ways in which faculty might use the technology in classes that did not contain student-athletes. The project team also answered any questions about the program and specifically asked the deans and the department chairs to indicate their support of the program by encouraging faculty participation. Responses to these visits were extremely positive although some deans and department chairs did indicate that they believed that certain members of their faculty would be strongly opposed to using the technology. Additionally, at the start of the semester, at the request of the CBA Dean, the project team made a presentation about the program to the school's faculty.

The next step in the implementation process was to identify and communicate with the faculty in those courses in which student-athletes were scheduled to miss numerous sessions during the semester. Personalized letters were sent to these faculty members to inform them of the program and to ask for their participation in it. Those that agreed to participate were given personalized, one-on-one training. Faculty members who did not respond to the initial request were again asked to participate in the program, but this time the request came from student-athletes in their course who were scheduled to miss classes. A member of the project team gave faculty members agreeing to participate individual training. Additionally, a project team member or a graduate assistant went to the initial class session in which a recording was to be made in order to insure that the system was working properly. Faculty members, especially those who needed greater assistance and/or assurance about using the technology, had an assistant attend as many classes as necessary until they were comfortable in using the technology. Fortunately, the number of faculty members requiring such continued assistance was relatively small.

During the semester, positive feedback was obtained from faculty, student-athletes and non student-athletes. Further, as use of the lecture capture technology became known on campus through word-of-mouth and a student



newspaper article, additional faculty members in a variety of disciplines asked to participate. Our experience is similar to those at other universities including one at the Iowa State University College of Veterinary Medicine where lecture capture adoption was slow initially, but due to encouragement by students and word-of mouth, a substantial increase in faculty participation occurred after the first year (Jouvelakas, 2009).

Because of this positive response, the program was funded on a full-scale basis for the Spring 2010 semester. The pilot program's methodology for obtaining faculty participation was used again and this methodology proved successful as 445 class sessions were recorded during the semester by fifty-two different faculty members in six different colleges. Faculty participation was greatest in the CBA and the College of Arts & Sciences. In total, 663 different students, including forty-eight student-athletes, accessed the recordings. Class sessions at our university are scheduled for either 65 minutes (three days a week) or 100 minutes (two days a week). Given in Table 2 is a frequency distribution for each of the 4,820 times a student accessed a particular class recording during the semester. As indicated, the amount of time varied substantially as some students chose to view or to listen to the entire class, while others selected only particular portions of the class session that were of particular interest. Those in the former category were most often student-athletes (or other students) who missed the entire class, while those in the latter category were most often non-student-athletes who attended the class, but who wanted to view or to listen to certain parts of the class more than once.

**Table 2: Amount of Time Spent Viewing the Recordings**

Amount of time spent viewing a recorded class	Frequency	Percentage
10:00 minutes or less	1018	21%
10:01-20:00 minutes	645	13
20:01-30:00 minutes	55	12
30:01-40:00 minutes	673	14
40:01-50:00 minutes	659	14
50:01-60:00 minutes	910	19
60:01-70:00 minutes	235	5
70:01-90:00 minutes	47	1
More than 90:00 minutes	78	2
	N=4,820	100%

At the end of the semester, a survey of participating students and faculty was conducted in order to determine their level of satisfaction with various aspects of the lecture capture program. Survey response rates were 65% for faculty (n=34) and 50% for students (n=332).

As shown in Table 3, the faculty had a positive experience with the course recordings as 82% said that they would use lecture capture again if it were available and 88% said that they would recommend it to other faculty. Slightly less than 50% indicated that the classroom recordings could help them to improve their teaching and 73% indicated that their students appreciated that the recordings were made available to them. Although not explicitly asked, faculty members did not indicate that they witnessed any significant decline in attendance as a result of the recordings in their open-ended responses.

Student results are shown in Table 4. Students were consistently positive about the lecture capture program. Most believed that the recordings allowed them to better learn the course material and to study for exams and quizzes. In addition, the student-athletes indicated that the class recordings reduced the effects of their missing class. When students were asked for their suggestions regarding the program, a large percentage indicated that they wished all faculty members would record their classes.

**Table 3: Faculty Opinions Concerning Lecture Capture Recordings**

Statement	Agree (%)	Neither agree nor disagree (%)	Disagree (%)
The recording system was easy to use.	94	6	0
The recordings were of value to the student-athletes who missed class due to athletic competition.	88	9	3
The recordings were of value to students who actually attended the class session.	66	22	12
The recordings allowed my students to better learn the course material.	52	39	9
My students appreciated the fact that I recorded the class.	73	27	0
I had a positive experience with the recording system.	79	18	3
Recording classes can help me to improve my teaching.	47	40	13
I would record future classes if given the opportunity.	82	18	0
I would recommend the system to other faculty.	88	12	0

**Table 4: Student Opinions Concerning Lecture Capture Recordings**

Statement	Agree (%)	Neither agree nor disagree (%)	Disagree (%)
The recordings were easy to access.	85	7	8
The sound on the recordings was good.	89	8	3
The visuals on the recordings were clear.	85	8	8
The recordings assisted my learning.	88	7	5
The recordings helped me study for exams and quizzes.	86	9	6
The recordings allowed me to obtain a complete and accurate set of notes.	87	7	6
The recordings allow me to review particular areas in which I needed clarification.	88	7	5
Overall, I am satisfied with the recording system.	88	8	4

Given below is a small sampling of faculty and student comments that were received in the survey about the lecture capture program.

“All students could use it to review. Student-athletes could view lectures while they were away and missed less content. It was also useful for students for which English is their second language. As a native English speaker, sometimes my English coupled with statistical terminology is too rapid for them.” (Faculty)

“I believe that in mastering the art of entrepreneurship and innovation, one has to be able to package and present one’s ideas well. In effect, I always require many different types of presentations from students -- some of them recurring rocket pitches, all of which I record with the lecture capture tool. They are then encouraged to watch them on lecture capture too; and review them so they can take note of their weaknesses and work to improve on them. I also think the act of recording the students adds a sense of seriousness to the presentations, which translates into how they prepare for the presentations and how they learn from them. I believe people can be good critics of their own abilities and that is probably as powerful as external reviews.” (Faculty)

“If this program could be integrated into other classes it would be amazing, that way, if I need clarification, I can just listen to the recorded session again. It would greatly help with studying.” (Student)

“I was not as stressed about missing class. It made me feel like I was in class while the teacher was talking.” (Student-athlete)

## **BUSINESS SCHOOL APPLICATIONS**

Lecture capture is a relatively low-cost and easy way to capture information for a variety of purposes. The benefit of it over the more traditional recording with a videographer is its ease of use. The faculty member or administrator can use lecture capture in the classroom or in their office at the university or at home as their schedule permits.

Once students in classes where lecture capture was used knew of the possibility, they would request it when they had a legitimate absence other than an athletic competition. Particularly since class participation is an important component of a student’s grade in the CBA, students did not perceive lecture capture as an alternative to class attendance, but rather as a support.

A number of business faculty quickly identified other uses for lecture capture. Faculty members used lecture capture when they had to be away at a conference or were going to be absent because of a religious holiday. In the past, a colleague would have taught the class or it would have been cancelled. The advantage of lecture capture is that precisely the material the faculty member wants to cover is covered and students know they are responsible for it. Other faculty used the technology to create online review sessions to help students prepare for exams. Sometimes this was in addition to in-class reviews and sometimes it was in lieu of them. Faculty also created modules for class sessions where a follow-up tutorial would be most helpful. An excellent early example of this was a faculty member who used lecture capture during a class session introducing the SPSS software package. Because the program captured her voice and the computer screen, students then had a reference with explanations when they began their own programming. The faculty member then posted the session for a separate online course she was teaching. Students in that class commented on its usefulness.

It is an easy step from creating help sessions within a particular course to creating review modules that are available to all business students. Faculty members know that students do not retain everything that is taught to them in a particular course and review is always important. Review modules can help support this. For example, modules on key aspects of accounting can serve as a review for students taking their first finance course a semester or more later. Modules on statistics and using Excel serve the same function. Modules on different aspects of accounting and finance support the advanced strategy classes. These modules become more important with the move to online

textbooks and book rentals. In both cases, students will not have access to the text as a reference once they have completed the class. Review modules for key concepts can help fill that void.

Lecture capture is also effective for students preparing presentations for class, for practice interviews, for negotiating skills practice, and for team meetings when team building is a curricular goal. As noted earlier with the faculty quote, capturing the students speaking, along with the audio and computer screen helps them better understand the comments and suggestions made by the faculty member. While capturing class assignments is one level, allowing students to practice multiple times and observe themselves between presentations helps them to build their skill level.

Faculty can use lecture capture to create a piece of the online component for a hybrid course. Short segments with a “live” faculty member can help the student connect with the faculty member and make the course more personal. It is also possible to capture guest speakers at clubs and other outside presentations for students who could not attend.

Academic support services can use lecture capture as another vehicle for communicating with students on many different topics. For example, an introduction and a welcome to the college can now be accomplished through lecture capture rather than by written communication. Besides live sessions on such topics as “choosing a major” or “applying to graduate school,” modules posted online allow students to review and digest and even share with their parents what was covered during the sessions. Students off campus for study-abroad or internships also benefit from access to this information.

## **LESSONS LEARNED**

Lecture capture provides faculty, administrators, and students a powerful tool for enhancing the educational experience. At the simplest level, it provides students a way to keep up with their course work when they have a legitimate absence. At higher levels, it provides faculty and student services professionals with a tool to enhance student learning and to communicate with students.

The lecture capture project team deliberately provided personalized one-on-one support to faculty who were willing to participate in the program. The team’s goal was to make the process of using this technology as simple as possible for the adopting faculty. We wanted a broad swath of faculty to try the new technology, not just the usual tech-savvy early adopters. If technology is to gain widespread appeal, it has to be seen as something that most any faculty can use.

We also knew that, typical of any new tool, there would be glitches in the system. Computer platforms vary in the different classrooms, some faculty use their own computer, and webcams or microphones have to be set up. There are many opportunities for problems and, for lecture capture to be successful, these problems have to be solved within the ten minutes when faculty are busy setting up to begin class. Having a support person on hand provides the necessary expertise and comfort level. And, it helped the project team understand the vagaries of the system and the variations in classroom set-ups. In part because of these findings, and with funding from the Provost’s Office, all classrooms with computers will have a common platform in the coming semester. This should simplify training and execution of the program.

The project team adopted a “hold harmless” policy. Faculty setup time at the start of any class is critical. Generally faculty members have less than ten minutes to set up for class, including loading any material they have on the computer and addressing student questions. The project team made it clear from the onset that if there was a glitch, the faculty member should abandon recording for that day and just begin the class. This rarely happened, but it provided a necessary comfort level for faculty – not capturing the lecture was not a failure. Starting the class on time was more important than getting the technology running.

It became clear very quickly that champions are needed to move adoption of a technology forward, and the champions need to be at multiple levels of the organization. The Dean of the College of Business Administration was strongly supportive of the program, providing money and providing “air time” at faculty meetings. One of the benefits of the presentations and announcements at CBA faculty meetings was that it provided faculty members the opportunity to raise questions or concerns. Faculty who had tried the technology chimed in with responses and

faculty began to think of other uses that would meet their needs. Besides the faculty meetings, two faculty members who were part of the project team visited faculty who had student-athletes in their courses or who expressed interest in the program in order to encourage their participation. Having used the technology themselves, they could address concerns from firsthand experience.

Perseverance and continued support are clearly necessary to continue to move the program forward. A growing number of faculty members are now comfortable using the technology without support. As the number of faculty users grows, the College of Business Administration is providing internal resources to add and support new users and new uses. Following the protocol that was established in the pilot program, new adopters are continuing to be given individual training and support. This approach, while appearing slower in some respects, allows a broader swath of faculty to take the risk of trying a new technology. We believe that, in the long run, the technology will be used by more faculty members for a greater variety of purposes, enhancing the educational experience of our students.

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# **An Investigation of Online Collaborative Tools by Business Professionals in the MBA Environment**

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## **ABSTRACT**

The purpose of this study was to investigate the usage of online web tools for collaboration by MBA students, many of whom are business professionals. The research was performed in a hybrid online MBA course in an Organizational Behavior class at Ashland University.

Students used three online tools ([www.dimdim.com](http://www.dimdim.com), [www.bubbl.us](http://www.bubbl.us), and [www.etherpad.net](http://www.etherpad.net)) to communicate on projects and then answered a questionnaire regarding that usage.

Three research questions examined in the study were:

1. What practical applications of these tools would participants use on their jobs?
2. What were the major advantages and disadvantages participants experienced in using collaborative web tools?
3. What was the comfort level of those individuals in working with these tools?

The author's underlying purpose in doing this research was to determine whether these tools were suitable for use in online classes and also to introduce MBA students to tools that they might use on their jobs.

**Keywords:** MBA students, web tools, online collaboration.

## **INTRODUCTION**

This study investigated the use of online web tools for collaboration and networking in the MBA Program at Ashland University. The research was performed in a hybrid online MBA course in Organizational Behavior. MBA students were selected for this study because the majority of them were business professionals who held positions in management or middle management.

Eighteen students used three web tools to communicate in the class and then answered a questionnaire regarding the usage of those three tools. Since this research was conducted in a behavioral class, the author also queried participants regarding the advantages and disadvantages of meeting online.

## **REVIEW OF LITERATURE**

In today's business world, the use of technology is paramount to most business professionals. In fact, management departments in colleges and universities are always striving to provide the skills that employers are seeking in their supervisors and managers. On occasion, these institutions are criticized for failing to provide students with the skills required in the new workplace (Maes, Weldy, & Icenogle, 1997). Therefore, there is a need for identifying skills that will help graduates in obtaining management positions upon graduation from college.

The outcomes expected from technically competent business managers mainly consist of two behaviors: An increased willingness to form partnerships with IT people and an increased propensity to lead and participate in IT projects (Bassellier, Reich, & Benbasat, 2001). In fact, educators have argued that deeper engagement and online discussion groups yield significant benefits for the development of professional practice (Wheeler, Kelly, & Gale, 2005).

As educators, we must stay abreast of *every* business need so that we can adequately prepare graduates for management positions in both small and large businesses. Smith and Demichiell (1996) emphasized the importance of *surveys* of stakeholders in designing new curriculum, hence the need for classroom study.

There has been an explosive increase in the use of Web-based “collaboration-ware” in recent years. These Web applications, particularly wikis, blogs and podcasts, have been increasingly adopted by education and business. They offer the opportunity for powerful information sharing and ease of collaboration. Wikis and Web sites can be edited by anyone who has access to them. Audio and video files can be downloaded to portable media players that can be taken anywhere, providing the potential for “anytime, anywhere” learning experiences (Boulos, Maramba, & Wheeler, 2006).

There are many free versions of these collaborative tools, which may explain the exponential growth. If used effectively, these tools enhance the online networking capabilities of students and professionals in all walks of life in utilizing their time and travel more efficiently. “The notion of ‘anytime, anyplace’ learning has been difficult to achieve, but recently the advent of cheaper, better-supported mobile, personal technology is making distance learning more achievable and more ubiquitous than ever before” (Boulos, et al., 2006). In fact, it is now common to find references to desktop video-conferencing as a computer-mediated communication application. The terminology also includes the use of e-mail, bulletin boards, video, audio, document sharing and real-time communication (Curtis & Lawson, 2001).

When we share online, we are creating connections that were not possible years ago. (Richardson, 2010). “These changes will transform the world everywhere people come together to accomplish something, which is to say everywhere” (Shirky, 2008). Today’s educators are both part of, and separate from, the traditional education environment (Veletsianos, 2010).

Much previous work has focused on face-to-face situations, while in this particular study the focus is on collaboration in an online learning environment and student preferences for online collaboration. It has been theorized that online interactions are lacking in nonverbal cues that are prevalent in face-time communication, and this may reduce the extent of the communication that is actually occurring (Curtis & Lawson, 2001).

As the participants of this study found, collaborative learning provides a particularly demanding context for both tutors and learners, which challenge conventional models of learning (Thorpe, 2002). The availability of electronic technology has enabled more adult students to participate in distance learning. Students who typically enroll in distance courses do so for convenience issues. They are time-bound due to work or travel schedule or location-bound due to geographic or family responsibilities (Galusha, 1997).

Just as there will always be some aspects of teaching/learning that will be more appropriate face-to-face, there will also be aspects of virtual communication through web conferencing, etc. that will be more effective for others. The changing demographics of higher education, with older students and professionals needing updated skills, signals those learners do not necessarily need the cultural stimulation of a campus life (Bates, 2000). They opt for convenience, hence the need for collaborative web conferencing.

In the business world, some meetings are more effective face-to-face, while others may be just as effective through virtual means, saving time and travel for the professional and the organization. The premise of this study focuses on needs of the older student (who is also a business professional), their preferences of collaborative web tools, and their comfort level with these tools.

## **RESEARCH QUESTIONS**

Three research questions examined in this study were as follows:

1. What practical applications of these tools would participants use on their jobs?
2. What were the major advantages and disadvantages participants noted in using collaborative web tools?
3. What was the comfort level of those individuals in working with these web tools?

## RESEARCH DESIGN

### Data Sample

Eighteen MBA students participated in the use of three online tools in an Organizational Behavior hybrid online class at an Ashland University satellite campus in Ohio. The class consisted of 10 females and 8 males, however, gender was not a variable examined in this study. Six students were under the age of 30, and 12 students were over the age of 30. Age was not a variable in this study, although it should be noted that the results of the survey reflect the views of a nontraditional audience.

### Methodology and Procedure

MBA students were introduced to three free online collaborative web tools throughout the course. The tools introduced were: (a) www.dimdim.com, (b) www.bubbl.us, and (c) www.etherpad.org.

Dimdim enables people around the world to share pictures, Powerpoints, PDFs, screens, and videos as part of their conversations. There is no desktop client (such as Skype or Outlook), therefore, it does not require users to install software on their computers to attend web meetings.

Bubbl is a simple web application that allows for brainstorming online. It allows for the sharing of colorful mindmaps, embedding mindmaps in blogs or websites, and/or e-mailing and printing of maps.

EtherPad is the only web-based word processor that allows people to work together in *really* real time. Etherpad updates every copy of a document every half second, compared to others which update every 15 seconds.

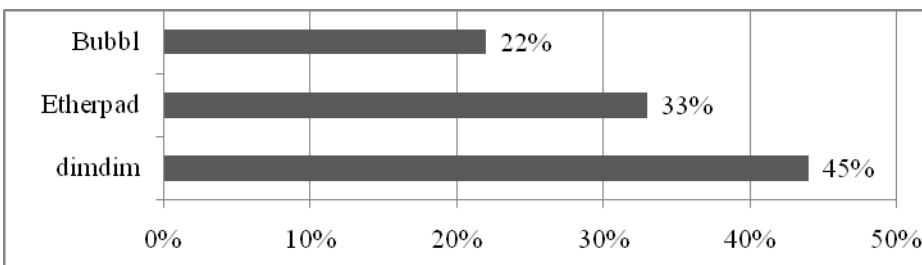
Students were given exercises to interact with one another using these tools. At semester end, students were administered a survey regarding the specifics of working with the three web tools.

### Results of the Survey

Since the sample used in the study was small, which causes a significant lack of power with respect to any statistical tests (i.e., only large differences on the various percentage differences in the responses could be found to be statistically significant), the researcher did not conduct statistical tests. Thus, only the *differences* in the various percentage differences in the responses will be reported

When students were asked which tool had the most *practical* applications for their needs on the job, they selected dimdim, as indicated in Figure 1. Since the variety of applications is so diverse with dimdim, it is understandable that participants selected this as their first choice.

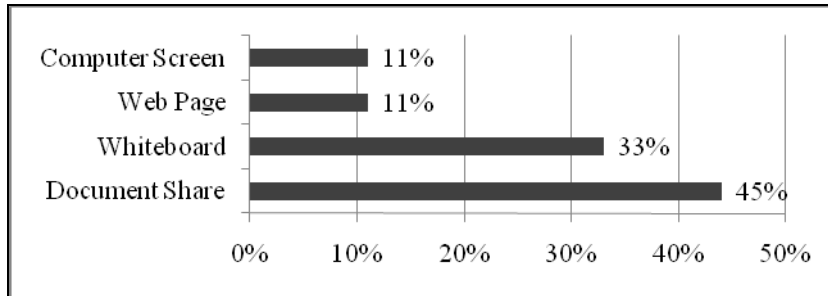
**Figure 1: Which tool had the most *practical* applications for your particular needs on the job?**



The web tool, dimdim, allows for the sharing of pictures, Powerpoints, PDFs, web pages, in addition to video and audio capability in different locations. Due to lack of video/audio capability with some of the respondents' home computers, students did not use the video and audio features of dimdim for this study. The instructor demonstrated the remainder of these applications in online class sessions. Students were given a team project to reinforce these skills. Students were then asked which specific dimdim utility they would use the most in their current jobs. Their responses are presented in Figure 2.



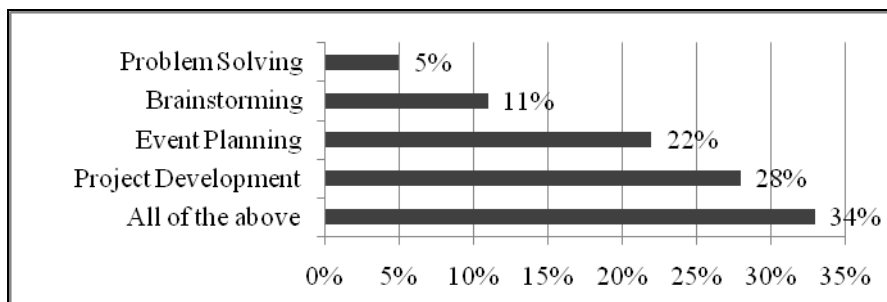
**Figure 2: Which dimdim application would you most likely share on your current job?**



Forty-five percent indicated that they would use dimdim for document sharing with employees at different locations. The capability of working on shared projects and documents both in educational settings and business settings is endless with dimdim. The use of the whiteboard for demonstration of concepts, principles, formulas, etc. would be invaluable in both settings and was selected by 33% of the recipients. Smaller percentages indicated they would use dimdim for the sharing of computer screens and web pages. This would be a valuable tool in a computer applications online class in particular.

Since bubbl is a mind-mapping tool for brainstorming online, the students used this tool (as part of the class) to do free association of organizational behavior concepts and terms. They also used this tool for a team project. After doing so, they were asked which tasks they would most likely use in their current jobs (see Figure 3).

**Figure 3: Which task would you most likely use bubbl for on your current job?**

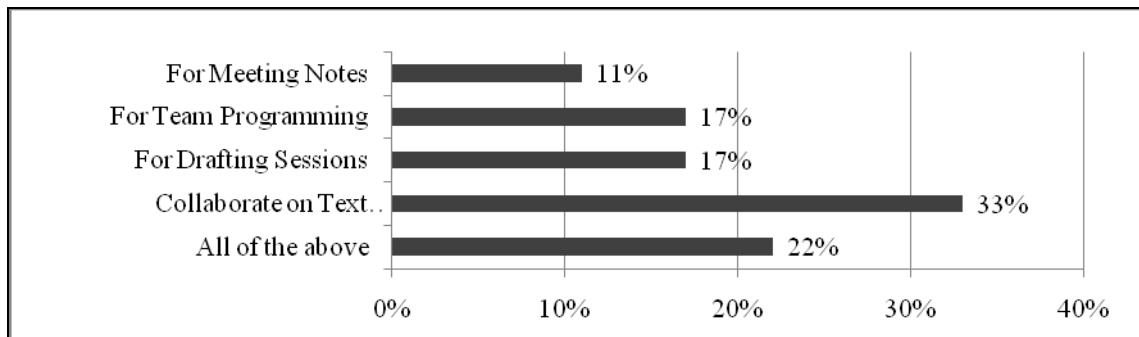


Thirty-four percent of the students indicated that they would use bubbl for *all* of the scenarios listed. Twenty-eight percent indicated they would use the tool for project development, and 22% indicated event planning. Smaller percentages indicated they would use the software for brainstorming and problem solving. Since bubbl easily allows for the addition of *bubbles* of information added to a schemata (much like an organization chart), it is the perfect tool for building an outline or a plan. This tool would be excellent for team projects in the educational setting or the business world. Connecting to bubbl is relatively easy.

EtherPad is the only web-based word processor that allows people to work together in *really* real time. EtherPad updates every copy of the document every half second, compared to others which update every 15 seconds.

Students were given a demonstration of EtherPad by the instructor online. Next, students were given a small group project to utilize the different features of this web tool. After working on EtherPad, students were asked which task they would most likely use Etherpad for in their current jobs. The results are listed in Figure 4.

**Figure 4: What task would you most likely use EtherPad for on your current job?**

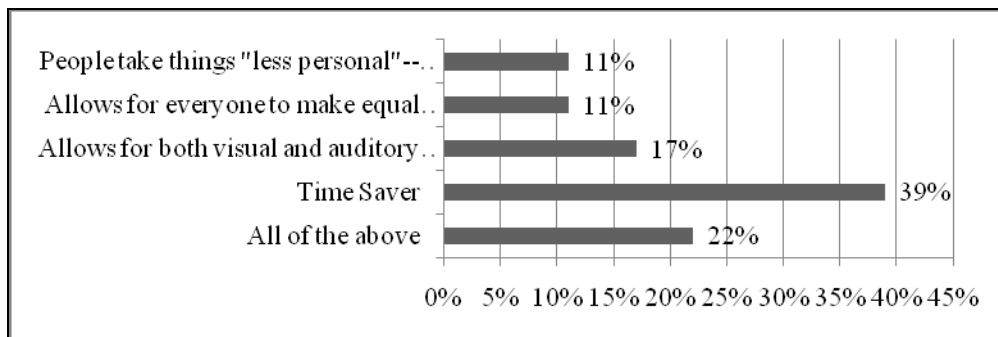


Thirty-three percent indicated that they would use EtherPad for text document collaboration in different locations, while seventeen percent indicated they would use it for drafting sessions and team programs. Twenty-two percent indicated that they would use all of the features listed. Seventeen percent indicated they would use this tool for team programming, while another 17% indicated they would use it for drafting sessions. Eleven percent stated they would use the tool for composing meeting notes.

Since EtherPad is a user-friendly tool, it is not surprising to see such a high percentage of users who would utilize this tool for collaborative purposes. In fact, on a survey question regarding “ease of use” among the three tools, Etherpad was voted number one by the respondents.

Since this study was conducted in an organizational behavior class, the researcher was also interested in the students’ view of the advantages and disadvantages of working collaboratively online. This was of paramount importance because these students are nontraditional students, who are also working professionals. The responses regarding advantages are listed in Figure 5.

**Figure 5: What is the major advantage you see for collaboration over the Internet using web tools.**

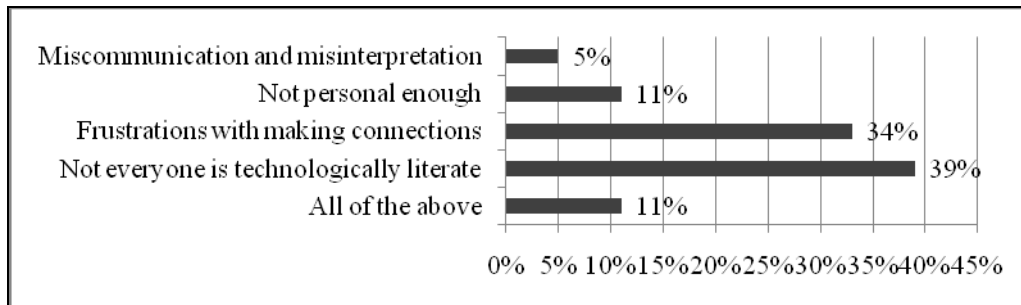


Thirty-nine percent of respondents stated that the major advantage was that they saw web tools as a time saver. Twenty-two percent said they saw all of the items listed as being major advantages. Seventeen percent felt that it allowed for both visual and auditory connection, and smaller percentages felt that this collaboration allowed for more open sharing and “equal” contribution by participants. This fact is not surprising, since students often take online courses because it means that there is less “travel” time and “face” time invested. As business professionals, respondents indicated through written comments that it was preferable to meet on the web because of travel and budget constraints as well. Several respondents noted that with web collaboration, one can “get down to business quicker.”

Figure 6 contains the students’ responses regarding the major disadvantages caused by meeting online collaboratively. One of the frustrations of this study was that a few of the students had difficulty understanding the concept behind the tools, and therefore had difficulty making connections. In a few instances, it took two or three

attempts for them to join the group. The responses on the *disadvantages* chart affirm the difficulties some of the students experienced while trying to connect online.

**Figure 6: What is the major *disadvantage* you see for collaboration over the Internet using web tools.**

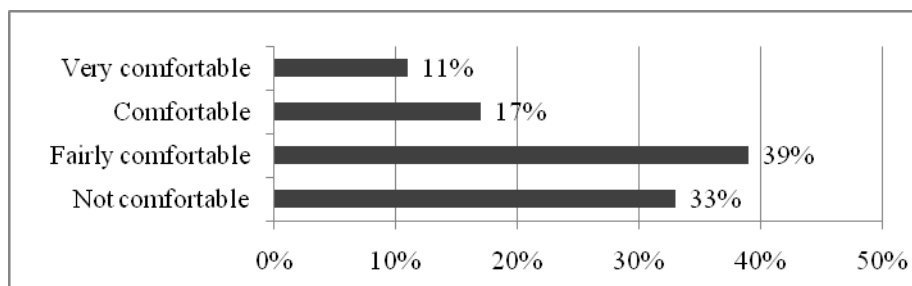


Thirty-nine percent indicated the major disadvantage was that *everyone involved in a connection/collaboration is not necessarily technologically literate*. Thirty-four percent indicated frustrations making connections due to technical difficulties as the major issue. Eleven percent indicated that this type of communication is not personal enough, while another 11% indicated that all of the items listed were major disadvantages. Only 5% indicated that this type of collaboration leads to miscommunication or misinterpretation.

Examining the advantages and disadvantages of collaborating online was of particular importance to the author since the basic premise of organizational behavior is based upon how individuals work together in the business world, and this study was conducted in an OB class.

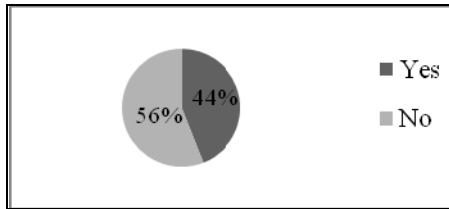
As a follow-up, participants were asked how “comfortable” they are working with collaborative web tools (see Figure 7). Thirty-nine percent indicated they were fairly comfortable, while 33% indicated they were not comfortable at all. Seventeen percent indicated they were comfortable, while only 11% indicated they are *very* comfortable. Since this was an older group of non-traditional students, it would be of interest to conduct this research with bachelor’s degree students in the 20 to 30 age group.

**Figure 7: Please rate your comfort level in networking with web tools**



Finally, respondents were asked if they currently use web tools on their jobs. As indicated in Figure 8, 56% indicated they did not currently use web tools, while 44% did use them.

**Figure 8: Do you currently use web tools to collaborate on your job?**



Since a slightly larger percentage of students have not used these tools, one might speculate that this could be one reason for the larger percentage of students who indicated they are only *fairly comfortable* using such collaborative tools.

## CONCLUSIONS

After working with the three free web tools in this MBA hybrid online course, the students noted specific preferences. The majority of students preferred dimdim as their tool of choice due to the number of practical applications it offers. Of the numerous applications that dimdim can perform, the majority of students noted they would primarily use this tool for document sharing at different locations. It should be noted that the use of a whiteboard scored fairly high among the class as well. This researcher has used the whiteboard feature for demonstration in online classes with relative success.

The majority of students noted that they would use the bubbl tool for a *variety* of purposes and applications, but students also showed a slight preference for bubbl's project development and event planning capabilities. The ease of use for brainstorming and mind-mapping with bubbl makes this an excellent tool for online projects in the classroom or business networking from one location to another.

In the use of EtherPad, the majority of students responded in similar fashion to dimdim, regarding the application they would most likely use. They selected the collaboration/sharing of text documents, while there was also a slight preference for the "drafting of documents and ideas." This user-friendly tool with rapid response time is also an excellent choice for educational and business settings.

Not surprisingly, students rated *time savings* as the major advantage for using web tools for online collaboration. Since the majority of students in the class were full-time working professionals who opted to take an online class rather than a face-to-face class, this is a plausible selection.

Students felt the major disadvantage of using web tools to network with others was that everyone is not technologically literate. The second choice was the fact that there could be technical issues at the time of connection. The author actually experienced some difficulty with both of these issues during the study. Perhaps not coincidentally, the majority of students indicated that their comfort level with web tools was below average. One probable cause might be the fact that 56% of the students did not use web tools on their jobs, and this was their first experience doing so.

## RECOMMENDATIONS

The author recommends that more formal research be done in this area. The author also recommends the use of a larger sample that would provide sufficient power levels of the statistical tests conducted on the data. The inclusion of age and gender as variables would also be of interest. Another avenue of interest would be the observation of two separate classes and comparison of results (i.e., face-to-face vs. online class).

Finally, since this study involved predominantly older students (over 30 years of age), it would be of interest to conduct the same study among bachelor's level students, where not only their ages are different, but also their perspectives and attitudes toward technology.

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## Two Exercises to Develop Global Awareness

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### ABSTRACT

Contemporary civilization is increasingly subject to the interconnection of peoples, technologies, markets, and politics on a world scale, resulting in what is now commonly described as globalization, or the “global village.” As the debate surrounding the potential consequences of globalization continues, little doubt exists that societies will become increasingly more interdependent, suggesting the need to expand and direct educational attention to how students grow in global understanding. The objective of this paper is to illustrate two experiential and interactive exercises that we have used to help students develop greater global awareness – a key component of global competency and cultural intelligence.

**Keywords:** globalization, global awareness, cultural intelligence, experiential exercises

### INTRODUCTION

At a rudimentary level, globalization is an attempt to comprehend the increasingly interconnected nature of civilization in the 21st century. Although the world may not yet be completely “flat” as described by Friedman (2005), the shift toward greater integration has generated considerable and often heated debate. Whether globalization will ultimately lead to a greater common good, or serve to increase the level of human misery, may largely depend on how well and to what ends people apply the connections now being established (Landes et al., 2010; Wolf, 2004).

Training business students to be more aware of global economic integration is especially important (Datar et al., 2010). Even those business students whose employment will result in a career occurring primarily, if not solely, within the United States will require greater global knowledge, skills and cultural sensitivities for several reasons. The world’s businesses are coming to the U.S.A., which serves as the headquarters location for a significant number of firms whose interests can be best described as international or global in scope (Moreton, 2009). Additionally, as ethnic diversity itself increases within the U.S., business management is required to understand as well as adapt to a wider variety of cultural norms and needs.

While the need for greater global awareness may be fairly obvious, it is not quite clear that business programs have been particularly effective in providing their graduates with ample and relevant training in this area. In a 2009 address, Matthew Cossolotto, president and founder of the Study Abroad Alumni International Foundation, noted that recurrent surveys of 18 to 24 year-old U.S. students demonstrate significant shortcomings in this cohort’s grasp of global issues. Specifically, one survey found that 75% of these students could not identify Israel on a map of the Middle East, and 30% could not locate the Pacific Ocean. Only 14% thought speaking and understanding another language was a necessary skill. Here, the willingness to study another language serves as a key indicator of one’s desire to learn about other countries and cultures.

In an in-depth look at the current state of business education Datar, Garvin, and Cullen (2010) suggest that a major challenge as well as failure of business education has been the inability to fully incorporate a global perspective into the business curriculum. These authors state that:

“...business schools still have much work to do before they can claim to be equipping students with a global mind-set. There are challenges of both knowledge and action. Not only must students gain an understanding of the world’s many differing business and economic environments, but also they must develop a set of conceptual, behavioral, and interpersonal skills that will allow them to navigate their way successfully through these environments, enabling them to work effectively with unfamiliar, culturally diverse customers, colleagues, partners, and suppliers.”(pp. 85-86)

A number of strategies exist with which to globalize business education, including but not limited to increasing the global content contained in functional courses, creation of integrative global management courses, sponsoring global field studies and projects, and the development of international exchange programs for use in post-secondary education (Cant, 2004). The Council on International Education Exchange (CIEE), for example, has long recommended greater student enrollment in study-abroad programs. CIEE data show that the number of undergraduates who study abroad has been increasing in recent years. In 2007, about 240,000 college students studied abroad, a more than two-fold increase from ten years earlier, yet this still represents a mere 1.3 percent of all U.S. undergraduates, a far smaller percentage than found with students from the majority of other developed nations.

All the above methods for improving one's global awareness are well and good. Study abroad programs and global experiential trips are certainly effective methods by which business education can be globalized. These methods demand a significant commitment on the part of students, however, requiring some sizeable combination of time, labor, and expense which serves to severely curtail the absolute number of students who can participate (Carver & Byrd, 2008). The purpose of this paper is to explore other ways to add global content to business courses and thus enhance student global awareness. The following section of the paper first discusses what it means for one to be globally aware, and then offers two experiential exercises that can be used in most business courses in order to enhance student understanding of the international dimensions of business.

## **GLOBAL AWARENESS**

A review of literature addressing global awareness, although not exhaustive, provided several concepts as well as terminology that describe the skills, competencies, and attitudes business students would require in order to increase their understanding of global issues. The review also indicated that some debate exists as to whether students are being trained to acquire a unique international skill set or to heighten a particular form of intelligence. Literature that addresses the development of this unique skill set most often uses the term "global competency"; several definitions of which are available. Curran (2003; p 10) defines global competence as "...appreciation of other cultures and the ability to interact with people from foreign lands. It is the ability to become familiar with an environment, not causing a rift while experiencing something new, and reflection upon the experience at its completion". Reimers (2009), however, defines global competency as the knowledge and skills that help people understand the flat world in which they live. These skills assist integration of information across disciplinary domains in order to enhance one's comprehension of global affairs and events, as well as to assist the individual in creation of possible actions with which to address these issues. In addition, global competencies may also consist of certain attitudes and ethical dispositions that make it possible to interact peacefully, respectfully, and productively with others who hail from diverse cultures and geographies.

Although consensus may not exist for a specific definition of global competency, there is some level of agreement which views this concept as consisting of three components: knowledge, attitudes, and skills. The components include having a positive disposition towards cultural differences as well as a framework of global values in order to engage differences; an ability to speak, understand, and think in languages in addition to one's native language; knowledge and understanding of world history and geography; and finally, the capacity to think critically and creatively about complex global challenges. Simply put, the globally competent person must possess knowledge of world geography, conditions, and events. He or she is someone who is aware of and understands complex and interdependent world issues and events, and also understands the historical forces that have shaped the current world system. Attitudinally, the globally competent person is sensitive to and respects cultural differences, is capable of empathy, and is able to cope with ambiguity and unfamiliarity. In terms of skills, the globally competent person can think critically, comparatively, creatively, and integratively. This person possesses effective communications skills, which include an advanced understanding of intercultural communication concepts.

Research by Mansour, Teagarden, and Bowen (2009) indicate that the success of business executives working abroad depends significantly on the individual possessing what is termed a global mind-set, a collaborative collection of intellectual, psychological, and social capital. Intellectual capital includes general knowledge of and a capacity to learn about world issues such as religion, cultures, history, and geography. Psychological capital allows one to be open to differences as well as the capacity to change one's self. Social capital is the ability to build relationships with people who differ from you in some significant manner. Of the three, intellectual capital is the

easiest to develop, and can be built through the development of a more cosmopolitan outlook, defined as the active interest in the culture, geography, and political and economic systems of the world.

Early and Ang (2003) have explored the concept of cultural intelligence (CQ). CQ is identified as a unique form of intelligence defining the individual's capacity to function and manage effectively in culturally diverse settings. Early and Ang posit that CQ is a multi-dimensional construct comprised of mental, motivational, and behavioral components. Moreover, they suggest that CQ provides the individual with four distinct capabilities, one being cognitive CQ, which addresses the individual's knowledge of norms and practices in different cultural settings, including information concerning economic, legal, social, and geo-political systems of various cultures. Individuals with a high level of cognitive CQ should be better able to discern and understand similarities and differences both within and between cultural situations. Although a relatively new concept, research on CQ supports the position that high CQ positively correlates with both cultural adaptation and work performance (Ng, Dyne, & Ang, 2009).

Global competency, global mind-set, and cultural intelligence each have unique components. Collectively, however, they suggest that being "wise" about globalization involves the influence of cognitive, behavioral, and motivational elements. As these attributes seem vital in preparing graduates who can function as world citizens and who are ready to join the global workforce, the question for educators becomes how to best provide students with experiences that enhance global learning and awareness (Datar et al., 2010; Prem & Welch, 2005; Shams & Camille, 2006). As noted earlier, study abroad and global field trips are two possible methods. Although each possesses significant potential benefits, these methods require a substantial commitment of time and especially monies, resources that many business students find in short supply. As viable alternatives, the current authors have developed two relatively simple and quick experiential exercises which have been used by the current authors in several business courses to enhance student global awareness – a key component of global competency and cultural intelligence. The exact steps and procedures developed for using these exercises and a subsequent discussion of the learning outcomes demonstrated by students follow.

## EXERCISES

**On-Line geography game:** Most conceptualizations of global awareness indicate that prowess with world geography is an important part of global awareness. The current authors have identified a number of on-line experiential geography games for use in the classroom. *TripAdvisor.com* offers one of the more user-friendly travel games, *Traveler IQ Challenge* (located at: <http://www.tripadvisor.com/TIQGame>), which is free, reliable, and does not require any type of membership. This particular exercise is map-based, presenting the player with a series of places that must be located on a map with a mouse click.

Students are directed to play the world geography version of *Traveler IQ Challenge*. A brief synopsis of the game follows:

- 12 levels with a total of 130 locations.
- Location identification becomes progressively harder. The game moves from North American and European locations to African, Oceanic, or Asian locations.
- The game begins by displaying a world location. As the location's name appears, a timer begins. The object of the game is for the player to physically identify the named location by clicking the mouse cursor as close as she or he can to where the player believes the location might lie on the map provided.
- Points are awarded for both accuracy and speed: accuracy determined by the proximity of the player's guess to the actual location on the map; speed by how quickly the player chose the physical location after its name was initially revealed.
- Players advance to the next level by scoring a certain number of points.
- The game adds an element of humor through running commentary based on the number of points a player earns for identifying each location. For example, a high score will receive a comment such as, "Your map IQ is off the chart", while low point scores are paired with such statements as, "Hello? Anybody home?"
- When the player has completed all 12 levels of the game or has failed to score high enough to advance to the next level, the game ends and the player saves his or her score. Should the player wish, he or she may create profiles which include the player's latest score, best score, and the highest level the player has completed.



- Each player is also ranked by how well he or she has scored versus the score of all other players of the game. The authors have found that the ability to compare one's scores to the scores of others acts as a source of both motivation and frustration for participants.

The game has been most frequently used by the current authors as one of four required exercises occurring in a junior (300) level Principles of Management course, however, any course which includes discussion of an international dimension of business would find the exercise of value. For the Principles class, the international dimension of business is discussed during the 3<sup>rd</sup> or 4<sup>th</sup> week of the semester. Before the module is initiated in the classroom, students are instructed to play the game outside of class and are encouraged to play as many times as desired. Each session requires approximately 20 to 25 minutes to complete. On the first day of the global business module, each student is required to provide three deliverables: a report of the student's initial score of the game, a copy of the student's highest game score, as well as a subsequent reflection on and discussion of two reasons why knowing geography would be helpful to managers. The use of the game and the expectations for students as it has been most frequently described in the Principles of Management course syllabus follows:

*Go to: <http://www.tripadvisor.com/TIQGame> -- the web site for the Traveler IQ Challenge, an interactive geography game. Play as many times as you can, the more you play, the more beneficial participation becomes to building your base of international knowledge. As you play, you must complete several small, related tasks 1: Record the score of your very first attempt playing the game. 2: When you are finished, print out your highest score. 3. Record the difference between the score of your first attempt and your final attempt, which will indicate your level of improvement. 4. Think about your experience playing the game, then provide two reasons why knowing geography and having a high travel IQ might help someone become a better manager.*

*As a bonus, the student with the highest score for this class will receive 100 points on Exercise 1 and earn an additional 100 pts on exercise 2. Additional points will also be given in Exercise 1 to that student demonstrating the most significant improvement from his or her first attempt, and his or her final attempt. **Grading:** Scores below 100,000 = C-; between 100,001-150,000 = C; 150001-200,000 = C+; 200,001-300,000 = B-; 300,001-350,000 = B; 350,001-400,000 = B+; 400,001-500,000 = A-; above 500,000 = A.*

Data concerning students' performance on the game was collected over the period of Fall Semester 2007 to Spring Semester 2010 from approximately 400 students who matriculated in seven sections of a Principles of Management class at a state-supported western university. Results indicate an average final score among participants of 260,000 points, reaching levels 7 and 8. The average first attempt score was 97,000 points, levels 3 and 4 of the challenge. These two anchors indicate an average improvement of 163,000 points or an increase of 4 levels in the game. The highest of the roughly 400 scores was 645,000, which at the time gave the participant the 160<sup>th</sup> highest score ever recorded, a substantial feat considering the *Challenge* has been played several millions of times.

Students' comments about the game indicate they find the game and the scoring rubric challenging. Moreover, informal student comments suggest that in its format of an on-line, interactive experience, participation in the *Challenge* closely fits the stereotypical 21<sup>st</sup> century college student's life and learning styles. Overall, three game performance trends stand out. One, in a typical class of 60 students, only 4 or 5 students score above 500,000. Two, student scores tend to cluster around two key cut-off points. Game scores cluster at or just above 150,001 and at or just above 300,001. It appears that students are playing the game until they reach scoring levels that satisfy desired grade levels. Three, a large number of students self-report playing the game numerous times (more than 10) to reach scoring levels above 200,000.

The exercise also requires students to indicate two reasons why knowing geography is important as it relates to skill development. Student responses fall into two categories. Individually, students indicate that knowing geography helps a person to be mindful of and sensitive to cultural differences, both within the firm as well as when one is working in some host nation. Sundry comments included "It shows respect.", "It enhances communication.", and "It surprises people from other countries to know that you are aware of them." Surprisingly many students stated that it demonstrates a person is more cosmopolitan. Comments also indicate that at the macro, or business level, knowing geography may provide a required organizational competency which may become a source of competitive advantage. Participants state that such knowledge may help managers understand important external forces in the global firm's environment such as weather, natural hazards, transportation costs, location of raw materials, and potential infrastructure problems.

Very rudimentary demographic data collected over the last two semesters indicates that our students are an ethnically diverse group with limited international experience (like most college students). While demographic data is limited, one demographic trend does stand out. International participants score significantly higher than do participants who are U.S. natives. Future iterations of the exercise in class will now collect key demographic information such as major business field, age, gender, ethnicity, and related data. Instructors who decide to use the game are encouraged to collect their own demographic data and to create scoring metrics that both challenge and motivate students without overwhelming them. The authors believe that the game's demonstrated positive impact on global awareness make such efforts worthwhile.

**Where in the world am I wearing:** *Where in the World am I wearing* is a procedurally simple and experiential way for students to explore the production and operations functions of the global textile industry. This exercise is partially based on the web-blog, later published in print, of Kelsey Timmerman (2009), a journalist who made a global back-packing trip designed primarily as a method of investigating the places and conditions under which his clothing was made. The exercise can be used as a stand-alone assignment, but it becomes particularly effective when it is introduced during the same lecture period that students are required to submit the results from their participation in the *Traveler IQ Challenge*. This exercise can occur in a period of 5-10 minutes; a more complete exploration of the global production and distribution of textiles and its impact in the United States will add approximately 10-15 additional minutes. The instructor begins by framing the exercise with the following comments and instructions:

*“The people who make your clothing work hard, and while they do not necessarily work in sweatshops they are often poorly paid. Does anyone know where his or her garments are made? Are there reasons anyone should care? To address these issues, we will conduct a brief exercise in order to determine just how truly global the textile business has become. In order to participate, the exercise requires you to follow several steps:*

- 1. Ask the person sitting in front of you if you can look at the label on his or her shirt. (Note: This statement is often bounded by the instructor within Hofstede's (2001) cultural dimension of individualism v. collectivism. It is suggested that since most of the participants are from highly individualistic cultures, the desire for a large “personal space” is an important cultural variable and as such, some participants may not wish anyone to touch their clothing, which would be construed as an invasion of that space. Additionally, it is noted that students from more collectivist cultures have smaller personal space needs and therefore are more likely to assent to the request.)*
- 2. Assuming the answer to Step 1 is “Yes”, look at the shirt tag and record the country of manufacture.*
- 3. The instructor then informs the students that he or she will poll the class for this information, and will then record the different countries of manufacture on the whiteboard.*

The exercise has been conducted in excess of 10 times in a variety of business classes, with total participation exceeding 600 students. With an average-sized class of 60 students, the number of countries of manufacture recorded has ranged from a low of 15 to a high of 26, with an average of 20 per class. It should also be noted that in this sampling over 80 different countries of manufacturer have been represented with China, Mexico, and the United States appearing most often. When exposed to the results of the exercise, students frequently comment that they had no idea that their clothing was made in so many different places. Two follow-ups questions are especially helpful in enhancing student learning from the exercise. Those questions are:

- (1) Why do you think such a large percentage of the garments being worn here today are made in places other than the United States?*
- (2) What has happened to jobs in the textile industry in the United States? Is this result a good thing or bad thing?*

Several web resources exist (i.e. The National Textile Association at: [www.nationaltextile.org](http://www.nationaltextile.org)) which allow instructors to provide data and statistics which elucidate the methods, rationale, and effects of increased textile importation into the United States. The final question is perhaps the most fruitful. It invariably generates considerable student input and some degree of debate. Students hold widely divergent thoughts and opinions concerning globalization, and freely espouse the same during this exercise. The majority of students' initial responses to the issue of job loss in the textile industry is that the jobs should be protected. Yet textile production can be difficult work (Byerly, 1986). Cotton mills in the U.S. Southeast were loud, dirty, hot, and often dangerous,

an environment one current author is quite familiar with through personal experience. Providing students insight into the difficulty of textile production frequently leads to reconsideration of their initial position, which can often be enhanced by the instructor posing the questions: “Would you be willing to do this type of work? Well, why not?” The essential learning outcome here, however, which is illustrated through the students’ dialogue, is that whether globalization is a good or bad thing is chiefly dependent on the ability of a firm, community, or nation to adapt and adjust to ever-changing conditions.

In a research project exploring the consequences of globalization for local regions in the U.S., Kanter (1997) found that visionary leadership, the creation of a hospitable business climate and the systematic retraining of workers in the Piedmont region of the Carolinas enabled a declining textile center to transform itself into a world-class center of manufacturing. As a consequence of the combination and application of these agents, many of the low wage, low skills jobs of the Southeastern U.S. textile industry have now been replaced with higher wage, highly skilled manufacturing employment with such notable global companies as BMW and Michelin, who have manufacturing facilities as well as their U.S. headquarters located in this area.

## CONCLUSION

As globalization and technological inter-connectivity lead to constant change in the global environment as well as continual restructuring of the global economy, business students in the 21<sup>st</sup> century will be required to increase their ability to both think and act globally. Far too few of them, however, currently have the wherewithal to understand, work with, and effectively interact with people who are unlike them. In this paper, the current authors have detailed two experiential exercises that can be used to enhance student global awareness. Results from the on-line world geography game, *Traveler IQ Challenge*, indicate an interactive map location game is especially effective in challenging students to improve their ability to identify world locations. The second exercise, *Where in the World am I Wearing*, was a simple but powerful way to demonstrate how truly globalized textile production has become. Instructors who use the exercises in their own classes should find them an important part of a systematic approach towards helping business students develop the mind-sets needed to be most effective in an increasingly “flat” world.

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# **Tweaking the Paper Planes Exercise: Using CVP Analysis to Enhance Student Understanding of Production Costs and Projected Profits**

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## **ABSTRACT**

The paper planes exercise is a fairly well-known and often-used classroom activity in management education, and it has been employed to demonstrate such general management topics as planning and control, production technology and work center design, lean manufacturing and push vs. pull production systems. This teaching note demonstrates the use and application of Cost-Volume-Profit (CVP) analysis to the paper planes exercise as a way to help students better understand and forecast production costs and projected profits for a paper plane production run. As such, it provides another way to integrate interdisciplinary thinking in business education.

**Keywords:** paper planes exercise, cost-volume-profit analysis, interdisciplinary business education

## **INTRODUCTION**

There is no shortage of critiques damning business education (e.g., Bennis and O’Toole, 2005; Pfeffer and Fong, 2002), nor is the occurrence of dissent and disappointment a new phenomenon (e.g., Porter and McKibbin, 1988). One might think that critiques such as these, from highly-respected business education luminaries, would cause rank-and-file business educators to become discouraged. The evidence, however, suggests that business educators have met these calls by devoting increased effort and attention to curricular and programmatic innovation (Salas, Wildman and Piccolo, 2009; Weldy and Turnipseed, 2010). A theme common to several recent business education improvement initiatives has been the drive to make business education more systemic (Atwater, Kannan and Stephens, 2008), more interdisciplinary (Athavale, Davis and Myring, 2008), and more in-step with real-world practice (Hamilton, McFarland, & Mirchandani, 2000). It may be argued that most rank-and-file business educators have taken the continuous improvement philosophy of AACSB to heart, and are less concerned with large scale change than they are with improving the smaller scale tools and methods of business education. This teaching note is one such example.

## **DISCUSSION**

I have used the paper planes exercise (e.g., Heineke and Meile, 1995) in class for a number of years to demonstrate general management principles (e.g., planning and control). Others have modified the basic exercise to emphasize specific business subject matter, such as product development issues, work center design, lean manufacturing and push vs. pull production systems (Billington, 2004). Over time, the basic exercise that I use has grown to include a more interdisciplinary perspective on business operations. As such, I use the exercise to check the level of understanding of the integrated nature of the business disciplines with my business undergraduates. While an exhaustive explanation of all of the elements discussed is beyond the scope of the present paper, one element lends itself to this short explication – the use of cost-volume-profit (CVP) analysis to forecast production costs and expected profits (losses).

The exercise I use is included as Appendix 1. I will assume that the reader is familiar with the general objectives and operation of the exercise, and that the students are business majors with some understanding of, or introduction to, basic managerial accounting; therefore, I will restrict my discussion to the elements of Stage 2 of the exercise (“Design Engineering and Sales Forecasting”). I provide “relevant data” about production costs and rates and require the students (assembled into production teams) to complete a pro forma income statement. In order to do this, the students must forecast likely production volume for the three minute production run.

Most of the students engage in “back-of-the-envelope” calculations to forecast production rates (“Let’s see, everyone can probably make 2 planes in a minute. So 2 planes per minute, times 3 minutes, times 4 people on the team equals 24 planes in the 3 minute production run...”). Some students actually try to time how long a team member takes to make a plane, and then use that “standard labor metric” to calculate the production volume. In any

case, these calculations are suitable as a general forecasting method, but their effect on projected profits (or losses) most often remains unexamined, and the completion of the pro forma income statement contains a discrete “answer” instead of a range of possible production volumes and profits. While it would be useful (and illuminating) to require the teams to calculate a breakeven volume, I find that waiting until the exercise debrief to suggest this “simple” tool provides greater learning impact. Therefore, I let the exercise run to completion where the students are required to calculate a final income statement based on their actual production results.

Table 1 provides a range of CVP values for various production volumes. Figure 1 provides a graphical depiction of generic CVP values. I use each of these tools during the debrief to discuss production planning and revenue/profit projections (among other elements of the exercise). Notice that the pro forma calculation of cost of goods sold (COGS = 1\$ per plane direct labor + 1\$ per plane direct material + 12\$ manufacturing overhead) is based on the *projection* that all of the raw materials will be used/work-in-process completed, and that all completed planes will be sold. This rarely happens. Some of the completed planes don’t fly the required distance during the “testing and acceptance” phase (these planes were invariably rushed to completion and their aerodynamic qualities are proven suspect). Following the flight tests, I have the teams complete an actual income statement based on their production/sales results (Stage 6). The many differences between the projected results and the actual results lead to multiple opportunities for discussion. In my experience, these discrepancies create an “aha moment” for the students, and, at the very least, they recall how to use a tool from managerial accounting to inform a wide range of business processes.

## CONCLUSION

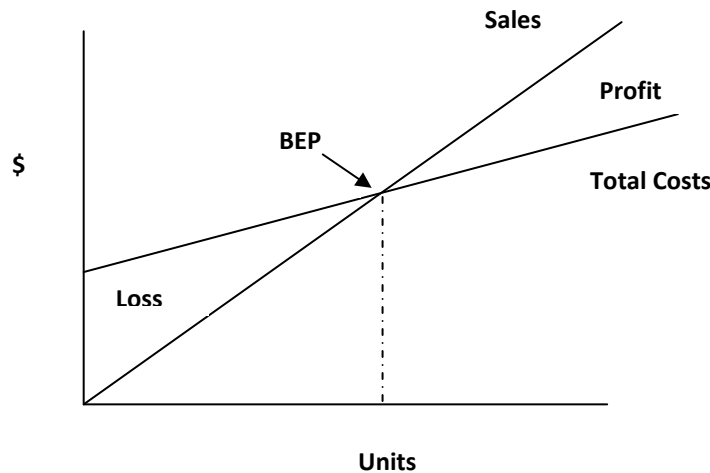
I realize that this is a very simplified approach to the discussion of a very complicated subject (CVP analysis), but my goals for the inclusion of this information are modest: I want the students to start thinking (regardless of the functional subject matter) of the integrated nature of business problems, and the many tools available to help them make better business decisions. My purpose here has been to offer this modest “tweak” to the generic paper planes exercise as an example of how course and class activities can be modified to enhance student understanding of the integrated nature of business operations, and of the need for students to embrace the complex and interrelated nature of “business”.

**Table 1: Range of CVP Values**

Income Statement					
UAI Commercial Airplane Group					
For the Year Ending December 31, 2010					
<i>INCOME STATEMENT FIGURES</i>	<i>000,000</i>	Range of CVP Values			
<i>STATEMENT DATE</i>	<i>12.31.10</i>				
	<i>Projected</i>	3	6*	10	15
Net Revenue	15	30	50	75	
Cost of Goods Sold	18	24	32	42	
Gross Margin	-3	6	18	33	
SG&A Expenses	6	6	6	6	
Operating Income	-9	0	12	27	
Taxes			4.8	10.8	
Net income	-9	0	7.2	16.2	

\* BE Volume

**Figure 1: Graphical Depiction of Generic CVP Values**



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## APPENDIX 1



### University Aerospace, Inc.

**Background:** UAI has a long tradition of aerospace leadership and innovation. The company continues to expand its product line and services to meet emerging customer needs. The broad range of capabilities includes creating new, more efficient members of its medium-range commercial airplane family; integrating military platforms, defense systems and other aerospace platforms through network-centric operations; creating advanced technology solutions; and arranging innovative customer-financing solutions.

As a member of the commercial aircraft division, you know that opportunities for competitive advantage can be delivered by the operations function – the individuals responsible for managing productive systems that transform resources into finished products, goods, and services for customers. Operations is part of the value chain, and as such, contributes substantially to product/service *quality*, product/service *cost*, and product/service *availability*.

**Your task:** You will participate as a team in the development and production of new commercial **Propulsion Augmented Platform – Extended Range (PAPER)** planes. Designate one member of your team to serve as an observer for one of the other teams. A maximum of four remaining team members will accomplish R&D, production, flight test, and aircraft sales. Any additional members of your team may advise participating team members, but may not physically assist in any way with prototype development and/or production.

At this time, observers will be assigned to competing groups.

**Stage 1: Research and Prototype Development** – Each team will be given 5 sheets of paper (raw material) for prototype development (the cost of these materials is accounted for under a separate budget – they are *free* for the purposes of this exercise). Teams may test fly prototypes at the test facility to insure they will be able to meet the specifications desired by the customer. Market research has determined that the targeted customer segment is looking for an extended-range, medium payload, low-cost, fuel-efficient aerospace vehicle for multiple uses (a wadded up ball of paper uses too much fuel, and the landings are too abrupt, as well – your objective is to make a suitable paper airplane that glides the required distance with a modest “push”...). You may begin after you receive your raw materials. You have **8** minutes for this stage.

**Stage 2: Design Engineering and Sales Forecasting** – During this stage, teams will decide on the prototype design that will be forwarded for production. Production will consist of manufacturing paper planes to meet the design prototype specifications. In addition, the teams will need to forecast production rates, production costs, and expected profits (gross margin and net income) for the **3 minute production run**. Relevant data about production costs is provided below – use the data to complete the pro forma income statement (provided on a separate page). You have **8** minutes for this stage.

Note: All figures are in *millions*

Direct Materials & Direct Labor - \$2 *for each sheet* (includes \$1 per sheet for materials + \$1 for direct labor)

Manufacturing Overhead - \$12 for the **3 minute** production run

Selling, General and Administrative Expenses - \$6

Income tax rate – 40%

Sales Price - \$5

\* DM & DL are variable costs; MOH and SG&A are fixed costs.

Rev = # planes forecast/produced x sales price.



**Stage 3: Production Planning** – During this stage, teams will plan the manufacturing/production processes. Develop processes to insure product quality/cost control. Insure that the products are ready for delivery to the test facility at the completion of the production run – the production run will last for **3 minutes**. Assume that your team has not yet instituted JIT processes, so there is a 10-second lead time for raw material delivery (every time you ask for raw material from the observer – who will act as your supplier – he/she will count to 10 before delivering the requested number of raw materials to you. The observer will count “*one thousand one, one thousand two, one thousand three,*”...and deliver the requested number of sheets after “*one thousand ten*”). In order to insure the efficient use of resources, you must order with sufficient lead time so that your production workers are not idle. Also, remember that holding too much inventory may hurt you (excess costs) if the order to CEASE PRODUCTION comes before you have completed your entire work-in-process inventory (each sheet ordered/delivered incurs a \$1 direct material cost and a \$1 direct labor cost). You have **8 minutes** for this stage.

**Stage 4: Production** – Your observer will maintain adequate supplies of raw materials, and will dispense them to you as requested. The observer will also keep track (as should you) of the number of sheets requested/used. You have pre-ordered 5 sheets – the observer will distribute them to you now. When you complete a plane, place it in post-production so that the observer knows it is a completed plane. The observer will keep track of the number of completed planes, as well as the number of planes still in-process. Following production, the planes will be taken to the test facility for testing and acceptance.

When the instructor says “BEGIN PRODUCTION”, you may begin producing your planes. Cease all work, including work-in-process, when the instructor says “CEASE PRODUCTION.” Remember, you will have **3 minutes for production**.

**Stage 5: Testing and Acceptance** – At this time, observers will count and record the number of completed planes and the number of work-in-process planes (# of sheets ordered = W-I-P planes + completed planes). Teams will designate a test pilot who will “fly” the completed planes at the test facility. The test pilot will bring the completed planes to the test facility when directed. Planes will not be certified for sale unless they complete flight testing, to include flying the required test distance under the designed load and configuration profiles, and with the required fuel consumption targets met. Each team will be advised concerning the number of completed planes which pass flight certification.

**Stage 6: Final Stage** – At this time, the team will prepare its results for presentation to the CEO of UAI. Complete the “actual” Income Statement (provided on the separate page). Multiply the number of (accepted) planes sold x the \$5 sales price. Calculate COGS, GM, SG&A Expenses, OI, Taxes and Net Income. Be prepared to discuss ways to increase revenue and margins – your CEO is not interested in running a charity!

Income Statement  
 UAI Commercial Airplane Group  
 For the Year Ending December 31, 2010

<i>INCOME STATEMENT FIGURES</i>	<i>000,000</i>
<i>STATEMENT DATE</i>	<i>12.31.10</i>

*Projected*

Net Revenue	
Cost of Goods Sold	
Gross Margin	
SG&A Expenses	
Operating Income	
Taxes	
Net income	

Income Statement  
 UAI Commercial Airplane Group  
 For the Year Ending December 31, 2010

<i>INCOME STATEMENT FIGURES</i>	<i>000,000</i>
<i>STATEMENT DATE</i>	<i>12.31.10</i>

*Actual*

Net Revenue	
Cost of Goods Sold	
Gross Margin	
SG&A Expenses	
Operating Income	
Taxes	
Net income	

# Teaching Multiple Skills with a Short Writing Assignment: Using Legal Case Briefs in Business Classes

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## ABSTRACT

Most business faculty are painfully aware of the disparate preparation levels of incoming college freshmen. Two areas in particular stand out: writing proficiency and technical skills such as mathematics. Exacerbating the problem is the inevitable adjustment process from a highly structured high school experience to the greater autonomy and expectations that students be responsible for their own academic destinies of a university setting. This collision of expectations and background often leaves both sides frustrated with the other. The necessary skills can be developed through writing assignments, but these can be time consuming and often difficult to administer and grade. We discuss a short and easy to prepare and grade writing assignment that can be used to evaluate multiple skills. It has been used successfully for 15 years in an Introduction to Business/University Experience course.

**Keywords:** case assignments; writing skills; freshman seminar; business ethics

## INTRODUCTION

Introducing incoming freshmen to college academics is often an exercise in frustration for both parties. Faculty members often see levels of academic preparation that vary widely across the student population. This often times becomes apparent in evaluating writing assignments, where grammatical or organizational skills may vary widely. In addition, students often struggle with the adjustment from a more structured high school experience to the collegiate model, which places more emphasis on student autonomy. Students often struggle adapting their study skills to those that are necessary to be academically successful in college. These skills include the ability to quickly and accurately organize and summarize information and effectively communicate it back via exams or term papers. The level of academic preparation can significantly affect the likelihood that a student will successfully complete a four-year college degree. These facts were highlighted in Tinto (2002):

- 77.7 percent of well prepared students who entered a four-year college were able to obtain a bachelor's degree
- 10.1 percent of the poorly prepared four-year college entrants were able to obtain a bachelor's degree
- well qualified high school graduates were roughly 4 times more likely to enter a four-year college and over seven times more likely to finish when they did so

The results of his research mirror recent reports regarding high school students' performance on the ACT, a widely used college entrance examination. In results reported in the Wall Street Journal (August 18, 2010), only 24% of the graduating class of 2010 taking the ACT exam scored high enough on the ACT in math, reading, English, and science to successfully complete entry-level college courses. This was from a sample of 1.6 million US students. Additionally, the article reported that even if a student took a "core" curriculum defined as four years of English, three years of science, three years of math, and three years of social studies, it did not dramatically improve performance. Of the students taking the core curriculum, only 29% of them met college readiness standards in all four subjects.

In response to these types of issues, institutions have established support mechanisms ranging from preliminary screenings to academic support offices that can help bring students up to speed as quickly as possible. The best-known of these is probably the National Resource Center for the First-Year Experience and Students in Transition at the University of South Carolina (<http://sc.edu/fye>). What about in the classroom, however? How do instructors deal with differing levels of preparation without having to devote a large amount of class time to writing instruction? One solution we found for our incoming freshmen was a relatively simple writing exercise utilizing legal case briefs

that can be used to test a number of skills all at once. The cases cover legal issues relating to business, such as product liability, sexual harassment, financial fraud, and socially controversial products such as tobacco. The briefing assignment can be used to teach and assess basic grammar, information capture and organization, as well as the ability to follow a specific writing format. These are more process-oriented skills. Moreover, the cases can then be used as a springboard into discussions of basic business disciplines and current topics in business ethics and decision-making. These are more content-related skills. Best of all, the assignments are easy to complete and grade, so they can be used frequently during a semester without bogging down students or faculty. Another advantage is that it introduces freshmen to case methodology as a pedagogical device that is used frequently in business schools. Although the briefs are not full-blown case write ups, they familiarize students with the pedagogy in a simpler format.

## ACADEMIC SKILLS AND CASE BRIEFING

There are a number of basic skills that are taught in business schools and continually reinforced throughout the curriculum. These include written and oral communication skills, team building and teamwork, and the ability to efficiently organize information, enhancing critical thinking. The first and last skills are ones that can be honed through writing assignments. Moreover, learning theory indicates that the ability to effectively organize information and present it in a well written form results in greater learning comprehension. Bixby (2000) discusses early skill development and summarizes how note-taking and writing are a part of the learning and development process. Note-taking promotes comprehension and increases the amount of material that students remember, while writing to learn also aids comprehension and increases student memory.

The skill set we are trying to develop involves both note taking and writing to learn features. For a number of years, we have utilized a short writing assignment that develops both skills at once. The student is required to take a written case, which is generally 7-10 pages long, and produce a written summary of it following a specific format. The grade is based on how well the student follows instructions by adhering to the format, the ability to summarize the information presented in the case, and how well written the final product is. One of the most attractive features of the assignment is that the brief is limited to one page, making it both easy for the student to write and for the instructor to grade. It also allows multiple cases to be covered in a single semester. Typically, we employ this assignment 6-7 times over the course of a 14 week semester along with exams and other assignments. More importantly, the assignment puts the student in what Bixby calls “active learning mode”, utilizing note-taking skills (although they often don’t realize it) and producing a written document that is graded for both content and technique.

## THE CASE BRIEFING RUBRIC

The assignment is administered with the following rubric, which is given with the first case at the beginning of the semester (via personal communication from Dr. Greg McCann, Professor of Business Law):

### Figure 1: How to Brief a Case: A Student Rubric

**Purpose** – The purpose of briefing a case is to enable you to move from a passive mode of learning to a more active mode. When you brief, you have to process information succinctly: summarize the facts, analyze the issues, and convey the court’s reasoning in your own words. This process is not “just for lawyers.” As a professional, a client will come to you with a seeming garble of facts and you will have to decide what the (marketing, accounting, management, or financial) issues are and analyze them and come to a conclusion/holding. Thus, this is a useful skill for all business people.

**Sections of the Brief** - Do not copy the court’s words; if you quote, then use quotations.

- A. Title** – These are the parties in the case, the court or location if given, and date. (e.g., *Roe v. Wade* USSC 1979). Thus, this is one short line.
- B. Facts** – This should be, in your own words, a summary of the key or relevant facts. One way to do this is to determine the issue and see if changing a fact would affect the analysis. Another approach is to answer these questions: Who is doing what to whom and why/where are they doing it?

- C. **Issue(s)** – This is the heart of the brief. State this as a question starting with the word “whether” (e.g., whether a minor can get out of contracts for necessities). Think of this as the question(s) the court is being asked to answer. Usually one sentence per issue.
- D. **Analysis/Reasoning** – This is how the court answers the question. Typically it is where the court applies the law to the facts. Often the court will mention prior cases. This is called citing precedent. This will often state a broad rule of law and any relevant exceptions. This will often mention any caveats; places where the law does not apply or facts that if changed would change the holding.
- E. **Holding/ Rule of Law** – The holding is simply who won (e.g., Roe). The rule of law is usually a one sentence statement describing what the case added to the law. (Hint: it often can be written as a statement.)

The important procedural elements of the brief are following the rubric, limiting it to a single page, and turning in a product that is free from grammatical errors. The rubric is designed to test both of the abilities we mentioned earlier (i.e., note taking and writing to learn). The rubric is structured such that there are several significant pieces of information that the student must identify in the brief. These are the issue, facts, holding and analysis/reasoning. The title and holding are very straightforward and are usually just single lines. The real meat of the brief lies in its other components.

For example, reading through the events of the case to determine what the it is really all about (the issue) and what facts are relevant to the outcome of the case develops the student’s note taking skills. As a practical matter, initially students usually do not do well on the assignment. They often have a difficult time identifying the core issue of the case, with a tendency to include all the information presented rather than distilling it down to just the key facts. But we do see improvement as other assigned cases are completed throughout the semester. The students get much better at identifying the key issue, cutting out extraneous information and becoming more discriminating as they go along. The in-class discussions help by identifying what is important and what is not.

The writing to learn skills are tested not only in the actual technical writing aspect of the brief but also in the analysis/reasoning required by the assignment. As Bixby discusses, writing to learn involves the process of condensing in your own words what is in the text. The assignment instructs the students to take the court’s reasoning and explain it in their own words. Once again, this is a learned skill and we see progress in the students’ ability to do so over the course of the semester and over repeated assignments. In the beginning, students often have difficulty coming up with a coherent explanation of how the court tied the facts of the case to the holding. Again, discussing how the court answers the important questions of the case helps the students learn how to do this on their own. This skill then can be generalized to other lectures or reading assignments. By strictly enforcing the one page rule, the students must be both discriminatory in their fact selection, but also able to describe the reasoning in an efficient manner. This is not always as easy as it sounds, and requires the students to carefully read and analyze the contents of the case.

## CASE CONTENT AND ETHICS DISCUSSIONS

Another major component in using the case briefing pedagogy comes not just from its technical skill development, but also the content of the cases themselves. The course has a number of objectives. Skill development is one, but we also introduce students to the study of business as well as business as a career. We cover disciplinary material in the course from the traditional business areas, but also discuss how business impacts society and try to prepare the students for their eventual transition to a career. The cases we employ are from business ethics readings texts. Almost all involve issues of business decision-making, usually with ethical considerations. Examples we utilize concern fraudulent investments, sexual harassment in the workplace, the sale of mislabeled baby food products, the sale of tobacco products in foreign countries, and the Enron accounting scandal. Each case involves a significant issue involving management and the legal outcome of their decisions. Depending on the case, this can be directly applied to them in specific terms as well as discussing the overall role of ethics in business decisions. For example, in the securities fraud case we covered, the issue involved the sale of unregistered securities by two Florida businessmen. The issue, which some students were not familiar with, was running a “Ponzi” scheme. The discussion revolved around what a Ponzi scheme was, how it differs from something like a multi-level marketing business, and the necessity of dealing with licensed brokers of financial products. In the case involving sexual harassment, we covered the idea of a “hostile work environment” and discussed things like workplace romance and the University’s

consensual relations policy. Many students were not aware that some employers prohibited such workplace relationships and that they could be grounds for termination. In all of the cases, the brief serves to develop note-taking and writing skills while the contents are used to discuss business topics and issues.

## OUTCOMES FROM THE EXERCISE

The purpose of the case briefs was to hone students' writing skills, promote the effective distillation and use of information, and illustrate issues related to business ethics and ethical decision-making. Over the course of the 15 years of using the exercise with our freshmen university experience business students, the following results have been noted:

- 1) Their writing skills improve. Sentence structure and grammar become more precise and succinct and the number of routine grammatical errors (spelling, improper word usage, etc.) decreases.
- 2) Their writing focus improves. By this, we mean that they are better able to identify the key elements in the arguments presented in the case and weed out less important facts. Their ability to follow the logic of the outcomes in the cases improves.
- 3) Their awareness of ethical issues in business increases. This is less process oriented but gives them exposure to important ethical issues framed in a business context. Ethics in the curriculum is important for AACSB accreditation purposes, and this starts that discussion at an early time in their academic experience.
- 4) They understand the use of different pedagogical devices in the business school relative to other places like the liberal arts. They become familiar with case methods (albeit at a simpler level) at an early time in their academic experience.
- 5) The briefs are easy to administer and grade from the instructor's point of view, and yet they yield valuable skill development and content exposure to students..

## CONCLUSION

Dealing with different preparation levels of incoming college freshmen often can be a frustrating exercise. We find that students vary widely in their ability to write clearly and effectively and that they have varying abilities to synthesize important material. In a freshman Introduction to Business/University Experience course, we utilize a simple pedagogical device that addresses these varying levels of preparation as well as helping students to develop note-taking and writing to learn skills. The case brief does this in a short assignment that is easy to administer and grade. In addition, the cases involve business ethics and decision-making. This gives freshmen exposure to business-specific ethical issues as well as disciplinary material as well as exposing them to the case pedagogy, which they see in greater detail in later classes. The methodology has been utilized for over fifteen years and has been shown to improve students' capabilities in writing, note-taking skills and analysis as well as their general business acumen.

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## Enriching Student Annual Report Analysis: A “Good to Great” Approach

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### ABSTRACT

This paper describes an Annual Report Project that can be employed in an undergraduate accounting course to strengthen students’ understanding of financial statement concepts and related analytical skills. The project provides students with the opportunity to analyze the most recent annual report issued by a company of their choosing. The goal of the analysis is to determine whether students would be willing to invest their own money in the company that they have analyzed. Since the report represents a discrete data point, students are asked to extend their analysis beyond the report by considering the major tenets of the book *Good to Great*. Great companies outperform the market and students assess the extent to which their company approaches or achieves greatness.

**Keywords:** annual report analysis, financial statements, great companies, interdisciplinary business education

### INTRODUCTION

Financial statement analysis is done for various reasons. Internally and externally these statements help to assess and control operations, assess the financial stability of business partners dealing with the firm, and show how the firm appears to creditors and investors (Jiambalvo, 2010; Weygandt, Kimmel, & Kieso, 2008). Corporate annual reports offer financial statements for consumption by the interested public and students. Annual report analysis can be a viable part of many business courses, as well as accounting courses and the accompanying textbooks (cf., Needles & Crosson, 2008; Needles & Powers, 2010).

The objective of the Annual Report Project (ARP) is to develop students’ analytical skills through an exercise aimed at better understanding financial statement components and related concepts. The project provides the opportunity for students to analyze the current annual report of a real company. Along with his or her team, the student chooses the company that they wish to analyze. This approach offers students a greater level of commitment to that choice since they participate in the decision-making process (Hellriegel & Slocum, 2009). While annual report analysis is nothing new, this approach adds the component of decision-making. Students are required to state whether they would invest their own money into the company after considering the results of their analysis. In order to explain their decision they must apply the textbook theory and course concepts to justify their choice.

In addition to analyzing the numbers, students are required to extend their analysis beyond accounting concepts into the qualitative realm of leadership and management. This complementary task is structured according to the concepts found in the popular business book *Good to Great* by Jim Collins (2001). While the traditional financial statement analysis process serves managers in assessing internal operations and external relationships according to familiar benchmarks (Thompson, Strickland, & Gamble, 2008), the good-to-great approach yields a cross-sectional method for comparison. Not only do students consider horizontal (year-to-year), vertical (within period), ratio comparison, and competitor analysis, they must consider how their firm compares to standards set by other firms, which might not be comparable to traditional industry benchmarks.

### THE ANNUAL REPORT PROJECT

The ARP consists of a team project reporting all the required financial information accompanied by a paper that each member accomplishes individually. The individual paper answers the question, would you invest in this company and why? The paper is expected to show a detailed assessment and analysis of the company, its environment, and its relative status among great companies according to the good-to-great concepts. Although teams have multiple members, a separate paper is written by each person in order to ensure the individual student attains the objectives.

## Team Project

In order to keep the level of interaction meaningful, as well as manageable, the recommended number of team members is three. The paper assessing the investment worthiness of the company must be accomplished by each student individually. All team members receive the same project grade; however, each team member receives individual grades for their portion of the oral presentation and for their paper. Students working as a team are not permitted to apportion the analysis amongst team members, but must work on it together. Working together means that students should not arrive at their conclusions independently, but should engage in discussion with group members and achieve consensus in their analysis and interpretation. They indicate their compliance with this criterion by making a corresponding statement which is included in the project summary. Teamwork is important in the business and accounting world (DuBrin, 2010), so each team member must be contributing in a meaningful way to the project.

Teams must prepare and submit a 15 to 20 minute presentation on the company they selected. They must also present the overall rationale to support the team's recommendation for investing or not investing in the company that they have chosen. The rationale must be based upon the analysis of the company's financial information, other external information, and the good-to-great concepts. Because these are undergraduate accounting students, the project is structured in a very systematic way, with itemized requirements are (see Appendix). The templates referred to in the Appendix as C1, C2, C3, and D1 are MS-Excel spreadsheets available upon request from the first author via e-mail (liz.arnold@citadel.edu).

The less systematic components of the analysis are the explanations of particular numbers, the interpretation of significant increases or decreases, the choice of competitors for analysis, and portions of the good-to-great analysis. Otherwise, students must follow specific directions in their pursuit of understanding financial statement concepts and developing particular analytical skills. The subjective portion of the analysis is intended to add a realistic dimension to the process. In addition to the items specified in the Appendix, students are given the instructions listed in Table 1.

**Table 1**  
***Team ARP Guidance and Instructions***

- 
1. Use these recommended Internet resources: <http://finance.yahoo.com> and [www.irin.com](http://www.irin.com).
  2. Find industry comparison and competitor information through Internet and library research.
  3. Answer all questions in Section B with one or two clearly stated sentences and all items in Sections C, D, and E with a minimum of 3 to 4 clearly stated, concise, and grammatically correct sentences. Spelling and grammar are part of the grade for short answers.
  4. Submit completed work with a cover page containing company name, company symbol and team member names followed by the organized team responses to the analysis criteria. Use a 3-hole flat folder and tabs between sections.
  5. Place the financial statements, audit report, and other information cited in the analysis at the end of the folder.
  6. Include the industry, competitor comparison, and "great company" information cited in your analysis.
  7. Ensure that all work is original and that you follow the rules to avoid plagiarism.
  8. Provide the following statement, with signatures, on a sheet following the cover page: *We have worked as a team and have not divided this work into components done by only one individual.*
  9. Review all ratios to ensure they make sense.
  10. ***Ensure that all of the questions and items listed on the ARP Analysis Requirements sheet are answered and included in your project report.***
-



## Individual Paper

Each student must submit his or her own individual paper summarizing the analysis of the team's company. The analysis must address the financial statements, ratio analysis, trends, current events, industry comparisons, and a defensible assessment of the extent to which his or her company approaches or achieves greatness. Ultimately, the student must commit to whether or not they would invest their own money into the company that they analyzed.

The paper should indicate the individual's knowledge of the company. Teams may gather information together, but each individual person must work alone on his or her paper. The paper must use professional, clear business language as though it were being written for a newspaper article about the company. It should be between two and four full pages of text and formatted according to APA style. Appendices may include graphs, charts, tables, and any other supplementary information. The paper should also include a title page. The title page and appendices are not counted in the page length. Plagiarism is a serious offense and must be avoided. Students must properly document their sources including corporate websites, all reports, and other resources used. Students must avoid the use of extensive quotations; quotes constituting more than 5% of the paper will result in a lower grade.

## THE GOOD TO GREAT ASSESSMENT

The unique aspect of this ARP analysis is the application of concepts from *Good to Great* (Collins, 2001). The basic components of the book appear in Table 2.

**Table 2**  
***Good to Great Principles (Collins, 2001)***

- 
1. Good is the enemy of great
  2. Level 5 leadership
  3. First who . . . then what
  4. Confront the brutal facts (yet never lose faith)
  5. The Hedgehog concept
  6. A culture of discipline
  7. Technology accelerators
  8. The Flywheel and the doom loop
- 

The essence of *Good to Great* (Collins, 2001) is a set of companies that not only performed well, but over a 15-year period outperformed the stock market with returns from 4 to 8 times that of other good companies. In one case, a company outperformed the market by 18.5 times. Because of the way Collins and his researchers approached their project, the application of good-to-great principles is most appropriate to the ARP. Their method was to analyze market data in order to find companies whose cumulative returns were at least three times the market over a 15-year period. Since students are analyzing financial statements in the ARP, it makes sense to have them consider how investors would view those statements in relationship to their willingness to invest, and thus signal the potential greatness of a company. By asking students to extend their analysis to consider the principles that Collins and company found operating among the good-to-great companies, they are assessing important dimensions that go beyond traditional financial statement analysis.

Collins' (2001) thesis is that good is the enemy of great. Since maintaining the status quo requires energy, it can take just as much work to sustain the status quo, as it does to be great. One of the features of great companies is Level 5 leaders. These leaders avoid celebrity status, embody personal humility, declare a fierce resolve to do the job, and seek excellence for the sake of excellence (Collins, 2001). In the ARP, students are asked to look for evidence of the character of the company's CEO, as well as evidence of great companies and how their company compares. Evidence of Level 5 leadership might point toward a great company. The other evidence that students must look for is the company's efforts to get the right employees on the job, thus following the principle that only the right people are true assets to a company.

Another important principle is that a company must confront the brutal facts of its situation and should not be led by those who spout false bravado (Collins, 2001). Next, the hedgehog principle indicates that the company must have a unifying concept supporting its existence, accompanied by passion, ability, and economic contributions (Collins). The members of that company must have a culture of discipline, so that people act within the bounds of that unifying concept. Further, these types of companies do not thoughtlessly rely upon technology, but use it wisely as a means to achieving their goals. Finally, the great companies realize that success comes gradually and is rarely attributable to a single event (Collins).

## CONCLUSION

Although the analysis of financial statements and annual reports is nothing new for business or accounting students, the good-to-great perspective adds a new dimension. This paper proposes a project to systematically guide undergraduate students through this process in order to achieve an understanding of the concepts and develop their analytical skills. In addition, students are asked to consider each of the good-to-great principles in an attempt to uncover evidence of their operation within their own company, within a competitor's company, and within companies achieving extraordinary returns in the market. This is a challenging task because the data for this part of the exercise can be anecdotal, qualitative, and difficult to find; however, in cases where such data exists, students should be taught to recognize it. Such capability provides one more dimension to their analytical skill base aimed at answering questions about the investment worthiness of companies. While a thorough financial analysis can reveal good investments, the additional analysis explained here contributes to decision efficiency. Investment decisions regarding great companies are less challenging, if not given.

Not only does this exercise enrich students' particular skill sets, the anecdotal evidence collected thus far suggests that students adopt a different perspective on the process when they have a vested interest. Students take the project seriously because the decision to invest their own money, as the result of their own analysis, must be defended in each individual's paper. Although student comments often affirm the excessive workload and amount of time required to produce the ARP, the feedback themes offered by the more reflective students include the accumulation of both skills and understanding. Some search skills appear in the following student statements: "We learned where to get financial information," "We contacted the company for their annual report," and "Now I know how to look for stock prices." But even more encouraging are the comments that both evince understanding and extend to the realm of enjoyment. Statements like, "I understand the reason for some of the ratios now," "This pulled accounting together for me," and "Now accounting makes sense" were accompanied by, "It was fun comparing the companies," "I never thought I would enjoy analyzing a company," and "This is really good stuff." If there is any regret, it is that the last comment states "good stuff," as opposed to "great stuff." As educators, we, too, seek to make the leap from good to great.

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## APPENDIX

### ARP ANALYSIS REQUIREMENTS For Company You Selected Due Date: Month Day, Year

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#### A. COMPANY AND OFFICER INFORMATION - Select a Public Company and provide:

- A-1. A printout of your company's financial statements (FS), audit report and relevant notes.
  - A-2. The company name, stock symbol, and fiscal year end date.
  - A-3. The company headquarters address.
  - A-4. The type of business, primary products and primary markets (selling areas).
  - A-5. The stock closing price for Month-Day-Year (*instructors inserts the dates for the 5 prior quarters*).
  - A-6. Notes about any event(s) that significantly affected stock prices since the last annual report.
  - A-7. The company's Standard Industry Code (SIC) or North American Industry Classification System (NAICS) code.
  - A-8. Officer information: brief background/bio (paragraph) on both the CEO and/or President & CFO; include current salary, if available, for each.
  - A-9. The company's auditors.
  - A-10. The signer of the company's internal control report (report required by SOX).
- 

#### B. FINANCIAL STATEMENT INFORMATION – accomplish/answer the following for your company:

- B-1. List the names with page numbers for the four basic financial statements (FS) in the annual report. If printing the report from an electronic source, include only the financial statements and appropriate footnotes.

##### *For B2 through B4 use the common size and horizontal analysis worksheet (C1) and FS:*

- B-2. Was there a significant change in total assets? If so, why?
- B-3. Was there a significant change in total liabilities? If so, why?
- B-4. Was there a significant change in total stockholders' equity? If so, why?

##### **Long Term Assets:**

- B-5. What depreciation method does the company use?
- B-6. Does the company show depreciation or amortization expense on its income statement?
- B-7. What intangible assets does the company have?
- B-8. Statement of Cash Flows: How much did the company spend on new property, plant and equipment (capital expenditures)?

##### **Stockholders' Equity:**

- B-9. What is the par value of common stock and the number of shares authorized, issued, and outstanding?
- B-10. Does the company have treasury stock, if so, give amount in dollars?
- B-11. Does the company have preferred stock, if so, give amount in dollars?

##### **Income Reporting:**

##### *For B12 use the common size and horizontal analysis worksheet (C1) and FS:*

- B-12. Explain any significant increase or decrease in revenues, expenses or net income.
  - B-13. If your company reports comprehensive income answer questions a through d below:
    - a. On which financial statement is comprehensive income reported?
    - b. Is comprehensive income greater or less than net income?
    - c. What items create a difference between net income and comprehensive income?
    - d. Is basic earnings per share computed on comprehensive income or net income?
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**C. FINANCIAL ANALYSIS – HORIZONTAL, COMMON SIZE & COMPREHENSIVE RATIO ANALYSIS (use templates\*) :**

- C-1. Use template C1 to perform a horizontal balance sheet and income statement analysis and briefly summarize the results of the analysis in 2 to 3 sentences.
- C-2. Use template C2 to conduct a common size balance sheet and income statement analysis and briefly summarize the results of the analysis in 2 to 3 sentences.
- C-3. Use template C3 to conduct a comprehensive ratio analysis for your company's performance providing the liquidity, profitability, solvency, cash flow and P/E ratio calculations for the current and previous year. Complete all ratios if the information is available; if the information is unavailable, then discuss this with the professor before submitting your report.

After each category of ratios (liquidity, profitability, solvency, cash flow and P/E) prepare a 3 to 4 short-sentence assessment commenting upon or explaining the ratio changes between the 2 years; you do not need to do this for each ratio, just each category. Explanations should be provided for material changes of 15% or greater. These comments should note any information provided by management in the Management Discussion and Analysis (MD&A) section and/or notes to the financial statements. Please label the respective sections of the ratio calculations and comments as follow:

- C-1. Liquidity Ratios and comments**
- C-2. Profitability ratios and comments**
- C-3. Solvency Ratios**
- C-4. Cash Flow Adequacy Ratios and comments**
- C-5. Market Strength Ratios and comments**

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**D. COMPETITOR/INDUSTRY COMPARISON:**

Compare your company's ratios to the industry or one of its competitors for the current or latest year for which both sets of data are available. Use template D1\* to conduct a ratio analysis for your company and the industry or competitor's performance for the current (latest) year, providing the liquidity, profitability, solvency, cash flow and P/E ratio calculations. The information should contain your company (include year) and the industry or competitor in the other column. You can also do a horizontal and common size analysis of your competitor; although this task is optional. You are required to provide a 3 to 4 sentence assessment comparing your company to the industry or its competitor, by ratio category and your overall competitor assessment.

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**E. GOOD TO GREAT ANALYSIS – Answer the following questions in order to determine whether your company or its competitors is great or seeking greatness according to the good-to-great principles (in all cases, provide evidence for your assertions):**

- E-1. What is the evidence that the company has a vision to be great?
- E-2. What is the evidence that the company is merely maintaining the status quo?
- E-3. Is the CEO considered a celebrity or does he or she avoid celebrity status?
- E-4. Does the CEO seem humble?
- E-5. Does the CEO have a fierce resolve to do the job?
- E-6. Does the CEO seek excellence for the sake of excellence?
- E-7. Does the company have the right people in the right positions?
- E-8. Does the company have the wrong people in important positions?
- E-9. Based upon what you know about the company, does it confront the brutal facts about its situation or does it seem to paint an unjustifiably rosy picture?
- E-10. What is the single unifying idea that drives the company based upon its passion, its abilities, and what it does to make an economic contribution?
- E-11. What is the evidence that the company has a culture of discipline to accomplish the unifying idea?
- E-12. Does the company engage in thoughtless reliance upon technology or is technology used effectively as the means to achieving the main goal in this company?
- E-13. Does the company seem to rely upon single events to create success or does it take a gradual approach toward achieving success?

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**F. OVERALL ASSESSMENT:**

Based upon the results of your analysis, state whether your team would invest in this company and why? Provide your team's 3 to 4 sentence response using your ratio analysis and assessments in C and D above. The team answer for the project does not have to be unanimous, just a majority.

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**G. INDIVIDUAL PAPER:**

Answer the question: “**Would you invest your own money in this company? And why or why not?**” Your 2 to 4 page paper should provide your detailed assessment and analysis of the company, its environment (the economy, competitors, etc.) and other external sources of information regarding your company. Appendices may include graphs, charts, tables, and any other supplementary information. The paper should also include a title page. The title page and appendices are not counted in the page length.

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All portions of this project are due **Month Day, Year**, including the paper (The paper for each team member should be turned in with the team project.) Late submission of any portion will be penalized. Time management is extremely important for this project.

\*These MS-Excel spreadsheet templates are available upon request from the first author via e-mail (liz.arnold@citadel.edu).

# More Than a Sight-Seeing Trip: Enhancing the Value in Short-Term Study Abroad

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## ABSTRACT

Educators are called to deliver an international curriculum that not only develops students' global understanding, but also develops a skill set to allow students to succeed in the global marketplace. Study abroad programs are one way of developing students' knowledge, skills, and abilities by providing an experiential learning process. This paper discusses and measures the impact of a short-term study abroad program delivered through a partnership between visiting and hosting universities in the United States and Russia. The survey research illustrates how the partnership provided peer-to-peer student interaction to enhance the value of short-term travel that expands beyond sight-seeing excursions.

**Keywords:** globalization, study abroad, international curriculum, emerging markets

## INTRODUCTION

The globalization of the economy has no intention of slowing. In 1977, Harry Triandis stated a socialization of cultures is needed in a shrinking, interdependent world. This is still true thirty-three years later. Educators are called to deliver international pedagogy that develops students with an understanding of the cultural, social, economic, and political systems throughout the world. Students need knowledge, skills, and abilities that will allow them to succeed in the global marketplace. Current undergraduate curriculum attempts to achieve this by providing international course offerings, study abroad programs, and service learning trips (Smith-Pariola & Goke-Pariola, 2006). But given the ever changing economic and political conditions and the emergence of new market economies, pedagogical innovations to the international business curriculum are appropriate.

While innovation of international curriculum can occur in many ways, study abroad programs warrant evaluation because of its growth over the past five years. The Institute of International Education (2007) has reported an 8-10% growth rate in US students studying abroad. While it is encouraging student interest in travel is growing, there are two important points to understand within this trend. First, there are still approximately 96.8% of US students that are unable to go abroad for a variety of reasons, including course schedules, programs of study, financial limitations, stay durations, or lack of interest (Albers-Miller, 1999). Second, short-term travel (defined as summer, a January term, or less than eight weeks) has seen an increase in popularity, while mid and long-term study abroad programs (defined as one quarter, one semester, or an academic year) have seen declines over the past ten years that can be attributed to the academic and financial barriers of extended, international travel (Institute of International Education, 2007). The trends encourage educators to develop innovative international pedagogy to help capture the large number of students not engaged in study abroad programs and to remain academically competitive by integrating the globalization trends into the curriculum. Short-term study abroad programs are a viable option to get more students abroad and to explore non-western, emerging markets.

While the majority of US students travel to Western civilizations, trends show increasing interest in non-Western countries and a need for educators to develop programs in these emerging markets (Koernig, 2007). Many terms have been given to these emerging economies. In 2003, BRIC became a well know acronym for the four emerging economies of Brazil, Russia, India, and China. These four countries represent 43% of the world's population and they have the potential to be the four most dominant economies in the world by 2050. In 2006, 'E7' was the popular term to represent the BRIC countries plus Mexico, Indonesia, and Turkey. The most recent term is 'PwC 30' consisting of 30 countries that represent 85% of the world economic output (PricewaterhouseCoopers, 2008). Regardless of what we call these emerging markets, they are important countries to study in the international business curriculum because of their future economic potential and because of the growing student interest in these countries. For example, China has experienced the largest study abroad growth of 34.9% from 2003/04 – 2004/05

and is the eighth study abroad destination. Russia, Brazil, and India continued to move on and off the list of top 20 study abroad destinations from 2004–2007 (Institute of International Education, 2007).

Short term study abroad programs can also benefit from a concentrated approach that focuses on a specific town or host university to provide academic and cultural immersion in a short time period (Brokaw, 1996; Lewis & Niesenbaum, 2005). Despite the potential benefits, few studies have assessed the impact of short-term study abroad programs at the undergraduate level and few studies have examined how short-term study abroad programs can expand the trip beyond just a sight-seeing excursion (Anderson, Lawton, Rexeisen & Hubbard, 2006; Fugate & Jefferson, 2001). This paper presents an international course with short-term travel as a way to engage more students, focus on non-western emerging markets, and enhance the international business curriculum through a foreign university partnership. The university partnership provided peer-to-peer student interaction and the ability to integrate academic and cultural activities to enhance the value of short-term study abroad. The authors enhance the international pedagogy literature by presenting the course development process and assessment results from the short-term study abroad trip that took place in the emerging market of Russia.

## **REVIEW OF THE LITERATURE: STUDY ABROAD PROGRAMS**

Short-term study abroad programs have been discussed in the literature with regard to both graduate and undergraduate students. However, the articles primarily focus on the execution and planning of a study abroad program and potential student issues that may occur during the trip (Duke, 2000; Gordon & Smith, 1992; Koernig, 2007). This focus takes a professor-oriented approach and is about what needs to happen before the trip occurs. While this is very important for a successful trip, the literature has limited publications on undergraduate student assessment from short-term study abroad programs. Student assessments that have been published focus on graduate and executive MBA programs, leaving an opportunity for assessment at the undergraduate level (Paul & Mukhopadhyay, 2003; Schuster, 1993; Schuster, Zimmerman, Schertzer, & Beamish, 1998).

The benefits of a study abroad program fit the experiential learning process by observing, discussing, questioning, and practicing principles of international business in its natural setting (Duke, 2000; Myers & Jones, 1993; Schuster, 1998). The learning experience is transformed through active participation of the students. However, the literature discusses if this active learning can occur in a short-period of time or only during long-term study abroad. Duke (2000) stated academic integration is difficult to achieve in short-term trips, but he did recognize the attractiveness of a lower cost to the student. Brokaw (1996) favored short-term trips only with immersion defined as experiences with the location, such as getting around with a map or using public transportation. The short-term trip discussed in this paper attempted to move immersion beyond a passive interaction with the geographical area and towards an academic integration experience that occurred through peer-to-peer foreign student interactions. The purpose is to illustrate that active learning can occur not only in long-term study abroad but also in a short-term trip.

In addition to short-term programs as a conduit of active learning, short-term trips also have the ability to provide interdisciplinary learning experiences that long-term programs may not offer (Albers-Miller, 1999; Lewis & Niesenbaum, 2005; Martinez, Padmanabhan, & Toyne, 2007). Cann (2000) recognized such a short-term, interdisciplinary study abroad program as unique. Part of the uniqueness with an interdisciplinary learning experience is that it allows students to learn from each other and it provides for more than just a culturally focused trip. Lewis and Niesenbaum (2005) empirically showed interdisciplinary course connections are beneficial and this can be a result of short-term flexibility versus long-term programs that require students to take multiple credit courses in their field of study to meet graduation requirements. Also by offering short-term trips as part of an academic credit course, the academic integration, as Duke (2000) recommended, can be fulfilled throughout the semester and not only during travel. The classroom interaction, as a supplement before and after the trip, can lead to better retention and richer classroom discussions as a result of the interdisciplinary perspectives. Lastly, the integration of interdisciplinary team projects and service learning activities further enriches the benefits that can come from short-term, interdisciplinary study abroad opportunities because the learning is not only individual, but also group-oriented (Cann, 2000; DeLoach, Saliba, Smith, Tiemann, 2003; Duke, 2000; Smith-Pariola & Goke-Pariola, 2006).

Regardless of the study abroad duration or destination, the challenge is to design an international experience that maximizes student learning outcomes. One such program could include peer-to-peer student interaction through a visiting and hosting university partnership. This type of partnership opens new opportunities for cultural immersion,

improves global curriculum, and provides interdisciplinary student interaction, service learning opportunities, and collaborative research opportunities. The following highlights a 15-week semester course that included 12 days of travel from the US to the emerging market of Russia. A partnership between a US and a Russian university expanded the travel beyond sight-seeing and included peer-to-peer foreign student interaction during the visit.

## **COURSE DEVELOPMENT AND PURPOSE**

The ability to develop a university partnership requires access to resources. Some ways of developing a university partnership can include sister school arrangement, alumni connections in other countries (Koernig, 2007), and international student organizations. The option of an international student organization is how this university partnership was developed. The student organization that was the catalyst for the partnership was Students in Free Enterprise, also known as SIFE. SIFE is a global organization with over 1,146 student teams in 48 countries (Students in Free Enterprise, 2007). The goal of SIFE teams is to develop educational outreach projects related to market economics, financial literacy, personal success skills, business ethics, and entrepreneurship. The US SIFE team initiated the interest in working with an international SIFE team and the team's faculty advisor began contacting Russian SIFE teams to generate similar interest and to determine a match in program goals. Over a nine-month process, and through email discussions with eight Russian SIFE teams that expressed interest, the US school discussed program objectives that resulted in developing a partnership with one university that best matched program goals, desired assessment outcomes, and resource availability.

The specific purpose of this course was to develop an educationally and culturally diverse experiential learning experience that went beyond location immersion and sight-seeing. This course was designed to provide a participatory approach that includes peer-to-peer student interaction, academic classroom activities, and location immersion; it was to be more than a sight-seeing trip. The US University was primarily interested in developing a class that was interdisciplinary, included a service learning component, and partnered with a university for foreign student interaction. The course design was driven by both schools mission statements (Institution of International Education, 2008; Schuster, 1993). The US University is a catholic, liberal arts institution emphasizing the interdisciplinary design and service learning component. The Russian university was also interested in experiential learning as supported by its Deputy Dean in Innovate Development position that assisted in developing the partnership and designing the learning experience that included classroom activities, cultural excursions, and working with a Russian orphanage to integrate service learning components into the trip. The result was a 15-week, three-credit course offered to undergraduate students at the US school. The class was designed as an interdisciplinary offering consisting of students from business, political science, history, and psychology. Twelve days of travel to Russia was a course requirement that occurred over the US fall break, with traditional classroom instruction conducted before and after the travel. The use of the weekends before and after fall break allowed for longer travel. Student departed two days before break and returned one day after fall break to provide for the long travel to Russia and to minimize other classes missed, resulting in a 12 day trip over a fall break (Appendix A).

## **COURSE ASSIGNMENTS**

The grading criteria of the course needed to engage all disciplines because the class consisted of a group of interdisciplinary students. The two primary grading assignments were individual journaling for students to reflect on the learning experience and a team project. The individual journaling approach is a favored study abroad assessment measure (DeLoach, Saliba, Smith, & Tiemann, 2003; Duke, 2000). However, despite Duke's (2000) assessment that projects are not as appealing as other activities in study abroad programs, the peer-to-peer student interaction from the university partnership transformed the projects into an effective experiential learning process (Appendix B).

The project assignments consisted of both the development and the delivery of student-led lectures about various international topics. US students formed small teams and self-selected a topic of interest to research and present to the Russian students during the visit. The US student teams conducted research prior to the trip on global marketing, political systems, legal issues, and cultural interests. The students shared their research findings with their Russian counterparts during the visit. The students were able to discuss their research, share experiences on the topic, and compare and contrast their findings with foreign students. The project assignment met the varied interest of the interdisciplinary class roster, it developed student research skills, it provided an opportunity to present



in a culturally diverse situation, and it was an opportunity for students to validate research findings with an authentic audience.

While projects may not be appropriate in trips without foreign student interaction, projects are appropriate in peer-to-peer learning situations. The projects create structure, provide comfort to students in knowing how they will engage with each other, provide an engaging and diverse learning environment for all students, and assist in managing pre-anxiety related issues caused by the students' lack of experience with the travel destination. Another benefit of the project assignment was that students were placed in a linguistically challenging setting that comes with traveling to a non-English speaking country. Students learned how to communicate with each other and they learned how to use a translator when appropriate. The projects were a means for students to gain confidence in their ability to interact with others in a global setting. Another benefit of this project approach is that it created course structure before, during, and after the travel occurred (Appendix C). Thus, the projects aided in developing students' knowledge, skills, and abilities within a global setting to create global awareness and competence.

The international student organization was an additional conduit for student interaction and learning. Both the US and Russian SIFE teams shared their team activities and they identified future team interaction possibilities leading to a sustainable partnership and future opportunities between the two universities. The benefit of connecting through a student organization is that it is more than a one-time experience because the student organization goals include sustainability and continual learning opportunities. The student organization also provides the opportunity for faculty interaction as best practices can be shared about advising a student organization and engaging students. As a result, the student organization provided a common platform to begin the partnership and it opened additional opportunities for integration not only with the curriculum, but also with co-curriculum activities.

## **COURSE ASSESSMENT**

Given the innovative nature of this course's development and purpose, and the limited undergraduate, short-term study abroad assessment, it is important to understand the impact of the course design and university partnership on student learning. Triandis (1977) identified three aspects of cross-cultural learning as cognitive, affective, and behavior. The peer-to-peer student interaction could have a significant impact on the affective and behavior skills of the students, while the cognitive skills could be developed both in the classroom and during the travel. A cross-cultural measurement instrument was developed to assess the affective and behavioral skills developed from the trip and the peer-to-peer student interaction. Prior study abroad programs have also used cross-cultural surveys, but they have been limited to EMBA programs (Schuster, Zimmerman, Schertzer, & Beamish, 1998; Paul & Mukhopadhyay, 2003). The assessment of this course used a similar survey instrument that was modified for application to undergraduate curriculum and travel to Russia. The survey results were analyzed from 32 students consisting of 12 US students enrolled in the class and 20 Russian students that participated throughout the US visit to their campus. A pair-difference t-test on the pre- and post-survey results of the US students and between the post-survey results of the US and Russian students was conducted.

Overall, student learning did occur as a result of the short-term study abroad trip and the peer-to-peer student interaction. Students were able to learn in the natural setting and overcome the challenges of interacting with foreign students. The students gained global skills and increased global preparedness as shown in the behavioral learning results. The US students experienced the greatest impact on perceptual difference that can be contributed to the peer-to-peer interaction and their travel to a foreign country. This provides a significant point of difference from international classes that only offer course lectures in a domestic location. The students' increased global knowledge, developed abilities, and gained cross-cultural skills through the active participation with foreign students. The affective and behavioral learning outcomes assessed through the survey research, along with perceptual differences, are discussed below.

### **Affective learning**

Affective learning is associated with attitude changes as a result of the travel program (Schuster, 1993) and the specific peer-to-peer interaction in this program. Table 1 shows the affective learning results. The survey questions were designed to integrate with the project topics prepared by the student and the activities organized during the trip (e.g., visit to a Russian business).

**Table 1: Affective Learning for US Students and between Russian Students**

Question	Dimension	US Pre <sup>1</sup>	US Post <sup>1</sup>	Russia Post <sup>1</sup>	US <sup>2</sup>	Russia <sup>2</sup>
Entering a foreign market like Russia to do business is very difficult	Doing Business	3.67	3.36	2.65		p<.05
Speaking the official language of Russia is important for conducting a successful business there	Language skills	4.17	4.25	3.10		p<.05
The economic growth rate potential of Russia is much higher than the USA	Economic growth	4.08	4.17	3.75		
Trade barriers make it almost impossible to do business with Russia	More trade barriers	3.00	4.25	2.00	p<.05	
Management practices are fundamentally the same around the world	Similar practices	2.75	2.83	2.70		
Reading books is an appropriate way to learn how to do business in Russia	Reading	2.67	2.42	2.05		

*Note.* <sup>1</sup> Mean responses from 5-point likert scale, where 1=strongly disagree and 5=strongly agree;

<sup>2</sup> Significance levels of US pre and post and Russia of US post and Russia Post

Language was a significant aspect of affective learning. In the post-trip results, the US students saw it more important to speak the official language after visiting the country and interacting with the Russian students. This is further supported as the US students expressed a greater interest in learning another language as a result of the trip. Language is a concern when traveling to non-western countries as there is a greater language barrier than study abroad programs to Western destinations for the US students. For example, without a basic knowledge of the Cyrillic alphabet independent travel on public transportation is difficult for non-Russian speaking students. Thus, there is a greater learning opportunity in non-English speaking countries. Eighty percent of the Russian SIFE team students engaged in the student activities and 40% of the Russian university students speak English as a second language. The peer-to-peer interaction was an opportunity for the Russian students to practice their language skills, providing language benefits for both the US and Russian students. The US students had the opportunity to present to English and non-English speaking audiences. This provided them with an opportunity to learn how to use a translator and to learn how to best communicate with a foreign audience. The project assignment provided a way for the student to gain cross-cultural communication skills.

Overall, the Russian students expressed lower affective learning scores. A potential reason for this could be the unilateral travel experience that was only experienced by the US students. Students' attitudes also changed about doing business internationally. Trade barriers add to the complexity of doing business internationally and this dimension showed statistical significance between the US and Russian students. US students visited a Russian business and were able to discuss international business and study the international trade laws through the project developed by one student team. These experiences could contribute to the US students expressing greater difficulty in doing business after visiting a Russian business and discussing business practices with the Russians. Both US and Russian students believe the most appropriate way to learn about doing business internationally is through experiencing it and not reading about it in a book. This shows the value of this study abroad program and reinforces the need to engage more students to study abroad.

### **Behavioral learning**

The US students exhibited greater confidence with global business issues as a result of the trip. It can be observed that traveling to another country provides new experiences and allows students to acquire new knowledge and skills. This is supported by the comments that the trip provided "personal growth and was a life altering experience".

Students changed not only behavioral attributes but also affective attributes with the frequent comments of a “different outlook on people, culture, and the world” as shown in the qualitative comments in Tables 2 and 3.

**Table 2: Qualitative Comments of US Students**

Common Themes (n=12)		
In your own words, how did this trip to Russia impact you?	Frequency	% US Students
Personal growth / Life altering experience	7	58.3%
Different outlook on people, culture, and world	5	41.6%
Better understanding of different cultures	5	41.6%
Better understanding of international relations / business	5	41.6%
Greater interest in travel / would go back to Russia	3	25.0%
Greater desire to learn language(s)	2	8.0%

**Table 3: Qualitative Comments of Russian Students**

Common Themes (n=20)		
In your own words, how did the American student visit impact you?	Frequency	% Russian Students
Improved political, economic, and cultural understanding between two countries	6	30.0%
Improved language skills	5	25.0%
Objective point of views about country and politics (not from media)	4	20.0%
Better understanding of American life	4	20.0%
Social / Emotional experience	4	20.0%
Better understanding of how Americans act in informal situations	2	10.0%
Changed stereotypes	2	10.0%

The peer-to-peer interaction also provided for interaction that supports active learning and not passive observations during sight-seeing tours. The personal student connections influenced behavioral changes and supported an international group learning process that could not be achieved in a domestic classroom. The US and Russian paired results showed both sets of students are more comfortable with facing global business issues and feel more internationally prepared as a result of the peer-to-peer student interaction shown in the behavioral learning assessment in Table 4.

**Table 4: Behavioral Learning for US Students and between Russian Students**

Question	Dimension	US Pre <sup>1</sup>	US Post <sup>1</sup>	Russia Post <sup>1</sup>	US <sup>2</sup>	Russia <sup>2</sup>
I would feel comfortable developing a business strategy for a company competing with Russian companies in Russia	Developing strategy	2.83	3.45	N/A	p<.05	N/A
I would feel comfortable being part of a team sent by a company to set up and conduct business in Russia	Part of team	3.50	4.25	N/A	p<.05	N/A
I would feel comfortable facing global business issues in the workplace	Internationally prepared	4.00	4.17	4.65		p<.05

*Note.* <sup>1</sup> Mean responses from 5-point likert scale, where 1=strongly disagree and 5=strongly agree;

<sup>2</sup> Significance levels of US pre and post and Russia of US post and Russia Post

### Perceptual differences

Another finding through the peer-to-peer student interaction is that students found they are more alike than they originally thought. The US students perceived greater cultural, social, and political differences before the trip. The post-survey results of the students were similar in cultural and social perceptions supporting the undergraduate students felt a connection through the peer-to-peer interaction. They realized more similarities than differences.

One interesting results is that the Russian students perceived a greater political difference than the US students. This perception may have been developed in the classroom based on increased knowledge of the US political process as US students presented a project providing knowledge and information about the US political system. The trip occurred during the Obama and McCain US political election and the students engaged in dialogue about the US political process, the Electoral College, and each presidential candidate's position on future relations with Russia. The ability to integrate a significant political event into the classroom learning, as a result of the interdisciplinary group of students and the project assignment, contributed to the perceptual differences between the students and greater knowledge of the political systems. The perceptual differences between the students are show in Table 5.

**Table 5: Perceptual Differences for US Students and between Russian Students**

Question	Dimension	US Pre <sup>1</sup>	US Post <sup>1</sup>	Russia Post <sup>1</sup>	US <sup>2</sup>	Russia <sup>2</sup>
As per my perceptions, the cultural differences between the USA and Russia are immense	Cultural	3.92	2.92	2.75	p<.05	
As per my perceptions, the social differences between the USA and Russia are immense	Social	3.75	2.92	2.85	p<.05	
As per my perceptions, the political differences between the USA and Russia are immense	Political	4.67	3.92	4.15	p<.05	
As per my perceptions, the legal differences between the USA and Russia are immense	Legal	3.67	4.00	4.20		
As per my perceptions, the economic differences between the USA and Russia are immense	Economic	3.83	3.92	3.90		

*Note.* <sup>1</sup> Mean responses from 5-point Likert scale, where 1=strongly disagree and 5=strongly agree;

<sup>2</sup> Significance levels of US pre and post and Russia of US post and Russia Post

### FUTURE CONSIDERATIONS

University relationships create reciprocal program opportunities and this is especially true with international partnerships. The international relationships developed are a source of program innovation that is important for meeting accreditation requirements, creating a competitive advantage in educational curriculum, and in fostering professional scholarship activities (Albers-Miller, Straughan, & Prenshaw, 2001). The challenge is finding a partnership school and overcoming language barriers in non-western countries. International student organizations can be a viable source for developing university partnerships. Once the partnership is agreed upon, faculty need to consider translation needs and recruit other faculty members involvement with the bi-lingual language skills needed. This provides an opportunity for interdisciplinary team teaching (McCabe & Grant, 2007) and involves others to build the sustainability of the partnership. In the US course, a team-teaching approach was used and one faculty member was Russian speaking. In the Russian university, a team approach was also used with bi-lingual faculty members involved in hosting the visit. The use of technology and translation software is another means of overcoming the language barriers. This can be used in long-distance communication and it can be used in face-to-face communication that is aided by translation software. Current technological advances reduce the language barrier of interacting with non-western countries.

Future program innovations are not limited to alternating short-term study abroad trips between the two schools. Other international curriculum innovations are possible through the partnership with web classes, joint research, and faculty exchanges. For example, a semester after the visit a joint International Marketing class was conducted between the two universities to simulate global business teams by having student interact through the use of technology. The classes were conducted simultaneously in both countries and did not require international travel as part of the class. Rather, the use of technology was used to bring both classes together to illustrate how global business teams work together. Joint research provides another opportunity as demonstrated by this article. All these outcomes support the motivating factors for international partnership programs that improve global curriculum and enhance collaboration for both student and faculty (Institute of International Education, 2008).

The authors would be remiss not to comment on the student opportunities that have also developed through the peer-to-peer interaction. The students continue personal dialogue through social networking sites (e.g. Facebook) and internet connections (e.g. Skype's). Both international student organizations, the SIFE teams, are developing joint projects such as product importing from the host country. The sustainability of the student organizations provides project opportunities and learning experiences for both US and Russian students after the visit. Thus, long-term relationships and many opportunities have been developed at all levels for the students, faculty, and the two universities.

Another future consideration, and interesting research opportunity, is to compare this short-term assessment against long-term study abroad experiences. A comparison of the two types of programs could provide value and aid business programs to evaluate the number and type of international programs they can and should offer. The assessment would also aid in future course designs and it could evaluate the type of assignments used in the design of study abroad programs. All of these assessment areas can assist international business curriculums to develop students' knowledge, skills, and abilities and to create a competitive advantage for its business programs.

## CONCLUSION

The review of the course design and student assessment results show variations to short-term study abroad programs can be a way to enhance student learning outcomes. Short-term programs can also overcome the barriers limiting student participation in study abroad programs. Educators need to evolve short-term study abroad programs beyond a sight-seeing experience in order to engage more students, provide competitive offerings, and reflect globalization trends. Ongoing assessment of the learning experience should also be an area of focus as study abroad assessment has been limited, specifically at the undergraduate level (Gillespie, 2002; Black & Duhon, 2006). Educators need to show the value of the learning experience to attract more students and to develop their knowledge, skills, and abilities to succeed in the global marketplace.

This paper provides one example of an interdisciplinary, participatory learning experience developed through a partnership between two universities in the US and Russia. While these partnerships take time and patience to find and develop, one recommendation is to look towards nontraditional sources for a relationship. This program was developed through an international student organization at both schools. The outcomes from the peer-to-peer student interaction, coordinated through the partnership, showed favorable impact in affective and behavioral learning in both the visiting and host students. The favorable outcomes show that innovation in short-term travel can enhance the international curriculum beyond textbook learning and sight-seeing excursions.

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#### APPENDIX A: TRAVEL ITINERARY

Date	Activity	Location
Day 1 - 2	Flight: US to Moscow	United States
Day 3 – 4	Cultural Activity: independent and group excursions to historical locations of interest to integrate all academic disciplines (Politics/History: visit to Kremlin; Marketing: visit to GUM shopping center; Theology: St. Basil's Cathedral)	Moscow
Day 5	Flight: Moscow to Chelyabinsk Classroom Activity: South Ural State University Tour Service Learning: Visit to Orphanage Home No. 7 Student Activity: Bowling	Chelyabinsk
Day 6	Classroom Activities: - Culture: Life as American Student - Global Marketing Activity: Marketing a new product in Russia Student Activity: Ice Skating	Chelyabinsk
Day 7	Classroom Activities: - Political Differences Presentation - Emerging Economies Roundtable - Culture and Art of the US and Russia	Chelyabinsk

	Student Activity: Russian Ballet	
Day 8	Cultural Activity: Ural Mountains Excursion; visit to the Asia / Europe divide	Chelyabinsk
Day 9	Cultural Activity: Chelyabinsk Historical City Excursion Classroom Activities: - Global Marketing Activity: Advertising Difference between US and Russia - SIFE Project Ideas: US and Russian team project development	Chelyabinsk
Day 10	Flight: Chelyabinsk to Moscow	
Day 11	Cultural Activity: independent and group excursions to historical points of interest to integrate all academic disciplines	Moscow
Day 12	Flight: Moscow to US	United States

## APPENDIX B: PROJECT ASSIGNMENT - PURPOSE, OBJECTIVES, AND REQUIREMENTS

### I. Purpose:

The class will include an application project about global business topics. During travel to Russia, the class will meet with Russian students to participate in peer-to-peer learning experience. This project assignment will occur before, during, and after the visit. Before the trip your team will come up with the project idea and the project structure. The project presentation will occur during the trip to the Russian students. A post-evaluation will occur in the classroom when you return home. The project will provide an exchange of knowledge and cultural understanding through peer-to-peer student interaction in Russia.

### II. Objectives:

- Gain knowledge and comprehension of Russia culture and environment
- Understand role of business in global market place and differences between US and Russian business dynamics in creating a global economy and markets
- Understand the environmental forces that influence global business including competition, economic and regulatory forces, and social responsibilities
- Learn strategies for the analysis and development of world markets; understand the US and Russian relationship
- Experience in conducting research, developing a project, and delivering it to a culturally-diverse audience
- Expressing ideas precisely, persuasively, and effectively in both written and oral form

### III. Project Requirements:

1. Teamwork: Students will form teams to complete the project (approved by 2<sup>nd</sup> week of class)
2. Project scope: The purpose, goals, and objectives of the project must be clearly defined
3. Project development: The use of secondary research is required to support your project scope
  4. In-class project development session: Students are to bring project agenda, outline, and approach that will be used with Russian students. A clear understanding of how the project will be presented must be demonstrated and how the project topic will be discussed with the Russian students
  5. Project draft presentation: Student teams practice the project presentation during a class session. Presentations will be to fellow students, faculty, and business executives.
  6. Final project presentation: Student teams will conduct project sessions to Russian students.
- Project Assessment: Student teams will assess the effectiveness of the project presentations and the learning results after the return home.

### IV. Project Ideas: (Your team and topic must be approved by 2nd week of class)

1. Global Marketing Experience: a workshop on global marketing where student select a product(s) and explain how it would be marketed in the US and in Russia. The advertising would be the main focus of discussion to understand how laws, regulations, language barriers, cultural differences and values can impact advertising strategies.
2. Global Investment Experience: a workshop on the law and mechanics of American financing for Russian businesses. Students would provide information about the Export-Import Bank and other financing sources to educate about the services provided and the process to secure funding.

## APPENDIX C: COURSE SYLLABUS

### BUS 395 – Global Business Experience: Russia

A study and application of global business in Russia. The class will include an introduction to the global business environment focusing on economic, legal, and cultural impacts on global management and marketing. A class project will be conducted on global business topics and will be executed through a cross-cultural learning experience with students from the South Rural State University in Chelyabinsk, Russia. A course requirement is the travel to Russia over the fall break to participate in the educational outreach project. Travel will include visits to the cities of Moscow and Chelyabinsk.

#### Course Materials

Course readings, articles, and assignments will be posted on Blackboard. Students are responsible for downloading and printing the class material. All reading assignments will be posted one week before the class assigned.

#### Course Learning Objectives

The course learning objectives support the department's mission to graduate responsible, competent, and ethical business professionals and also support the overall Undergraduate Program goals and objectives. At the completion of the course each student should achieve:

1. Knowledge, Comprehension, and Application of:
    - Role of business in the global market
    - Russian business environment and culture
    - Understanding of US and Russian business dynamics in creating a global economy
    - Understanding the environmental forces that influence global business including competition, economic, political and regulatory, and socio-cultural forces
    - Awareness of global social responsibilities in business environments
  2. Experience in:
    - Developing strategies for the analysis and development of global markets
    - Conducting research to understand the USA and Russian business and economic relationship
    - Developing projects for culturally-diverse audiences
    - Effectively presenting and interacting with a culturally-diverse audience of Russian students
  3. Support of the University & Department Learning Objectives
    - Faith
      - Ethics: adherence to University ethical standards; understanding of the role of enterprise in the broader society through travel to Russia and interaction with Russian students
    - Discovery
      - Technical Skills: use of Blackboard, library research skills, translation technologies
      - Problem Solving: use of library research skills, global travel and field studies, class project development; foster life-long learning and personal development through international travel
      - Data Analysis: class project development
      - Administrative, Planning, and Judgment: managing and completing multiple assignments, global travel
      - Communication: written assignments, oral presentation, and class participation, effective team and individual communication skills; interaction with students at South Ural State University in Russia
    - Leadership
      - Maturity and Responsibility: timely and professional completion of assignments, respect for others, and appreciation for global diversity, global travel and representation of Mount St. Mary's University to the South Ural State University in Russia
      - Team Skills: projects and class activities; global travel
    - Community
      - Professional Responsibility: personal conduct and ethical behavior
      - Social Responsibility: understanding of role of global business for completion of class assignments and global travel
  4. Support of the Undergraduate Program Goals & Objectives
    - The skills of analysis, communication, and problem solving that enable appreciation, critique, and contribution to that tradition
-



- Course readings, research skills, written assignments, and cross-cultural project assignment; interaction with Russian speaking students
- An understanding of the purposes, methods, and substance of a particular intellectual discipline
  - Understanding of global business integrating learning and decision making skills across an organization with understanding of the impact to a global society
  - Inter-cultural experience through travel to Russia and interaction with students at Russian university
- The personal synthesis of learning and the capacity for life-long inquiry that constitute the ultimate goal of a liberal education
  - Integrative global learning and decision making across an organization with understanding of the impact to society

**Cross-Cultural Learning: Project Assignment**

The class assignments will include projects about global business that will be presented to Russian students from the South Ural State University. The projects will consist of idea formation, development, execution, and evaluation. The projects will provide an exchange of knowledge about global issues and a cultural understanding through Russian student interaction to provide a peer-to-peer learning experience.

Students will work together as a team to develop the project(s). Students will present a project idea for approval by the faculty the second week of class. The use of secondary research is required for this project and to support your project idea and the presentation materials. The project will be developed before the travel to Russia occurs and a draft presentation will be made to an audience of other students, faculty members, and business professionals prior to presenting the project to Russian students. The team will prepare an oral and written report on the project lessons learned and the exchange with the Russian students. See the course schedule for due dates.

To receive credit for the team assignments you must equally and fairly contribute to the project. All team members will receive the same grade for team assignments. Each student must take full responsibility for the effective management of the team and its work. See additional handouts for project objectives and requirements.

**Grading Criteria and Assignments**

The course grade consists of both group and individual assignments. The following is a summary of the assignments and the respective point values:

Assignments	Points
Cross-cultural learning: Project assignment (development and execution)	450 points
Project assignment: Team lessons learned	200 points
Individual experience: Reflection paper	150 points
Class assignments and participation (including appropriate travel conduct)	200 points
<b>Total Points Available</b>	<b>1,000 points</b>

**Course Schedule and Content**

The following provides an overview of the course schedule and content. The schedule is subject to change based on availability of business professionals that will be interacting throughout the semester and providing your team with feedback on the cross-cultural learning project.

Week	Class Content	Assignments
1	<ul style="list-style-type: none"> <li>• Syllabus review, class introductions</li> <li>• Travel itinerary</li> </ul>	Review Syllabus and assignment rubrics on Blackboard
2	<ul style="list-style-type: none"> <li>• Global business environment</li> <li>• Project: idea presentations</li> </ul>	Assigned readings Due: Team project idea Due: Travel payment, Visa application, photo, liability and insurance forms
3	<ul style="list-style-type: none"> <li>• Russian capitalism</li> </ul>	Assigned readings Due: Project scope forms
4	<ul style="list-style-type: none"> <li>• International business and marketing</li> <li>• Project: status reports</li> </ul>	Assigned readings Due: Project outlines

5	<ul style="list-style-type: none"> <li>• Project: draft project</li> <li>• Team presentations to faculty and business professionals</li> </ul>	Due: Draft project presentation
6	<ul style="list-style-type: none"> <li>• Project: development and review</li> <li>• Guest speaker: International Business consultant</li> </ul>	Due: Revised project presentation
7	<ul style="list-style-type: none"> <li>• Project: status report</li> <li>• Travel discussion and details</li> <li>• Student ambassador role (Guest Speaker: Vice President Academic Affairs)</li> </ul>	Due: Final project presentation
8	<ul style="list-style-type: none"> <li>• Travel to Moscow and Chelyabinsk (October 9 – 20, 2008)</li> </ul>	
9	<ul style="list-style-type: none"> <li>• Travel debrief and discussion (external audiences of faculty, administration, and business professionals)</li> <li>• Projects: post-analysis discussion</li> </ul>	Due: Project lessons learned
10	<ul style="list-style-type: none"> <li>• Religions of the world</li> <li>• Guest speaker: Orthodox clergy, Theology faculty</li> </ul>	Assigned readings
11	<ul style="list-style-type: none"> <li>• Russian leadership: biographies</li> </ul>	Assigned readings
12	<ul style="list-style-type: none"> <li>• Current foreign policy issues</li> </ul>	Assigned readings
13	<ul style="list-style-type: none"> <li>• Russian economic history (1917-1991)</li> </ul>	Assigned readings
14	<ul style="list-style-type: none"> <li>• Russian economic history (1991-Present)</li> </ul>	Assigned readings
15	<ul style="list-style-type: none"> <li>• Russian socio-cultural elements</li> <li>• Class review and reflection</li> </ul>	Due: Individual reflection paper

# Using Playing Cards to Facilitate Dynamic Interaction and Control the Composition of Classroom Groups

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## ABSTRACT

Many business programs require group projects and break into groups during their class sessions. The increased use of teams is being driven by potential employers and accrediting agencies (Colbeck, Campbell, & Bjorklund, 2000). Group assignments help link the classroom experience to the work environment (Schultz, Wilson & Hess, 2010). Some employers rank the ability to work in groups to be the most important skill that they look for in business school graduates (Chapman, Meuter, Toy, & Wright, 2006). Business school faculty need to develop skills and techniques for forming and managing groups in the classroom. Using a common deck of playing cards and inexpensive stickers a faculty member can manage the composition and rapid reshuffling of teams in a classroom setting. A properly prepared and utilized card deck can enable a class to be broken into groups repeatedly throughout a class period with new students each time. Using group discussions and group assignments can help faculty teach 21<sup>st</sup> century students.

**Keywords:** pedagogy, group assignments, managing classroom groups, playing cards

## INTRODUCTION

The workplace demand for ‘knowledge workers’ has driven the need for a new system of education. This new system of learning, however, is one that becomes difficult to employ when it is understood that the structures, processes and objectives within higher education today have changed little since their inception in the Middle Ages. Though the foundations of the American system of education reflect a reliance on the principles of scientific management, it is clear that an ‘assembly line’ mentality will no longer define success in the Information Age (Goroff, 2008). Successful education in the 21<sup>st</sup> century therefore will be generated by an accurate blending of pedagogical approaches and the characteristics that define the student population.

## CHARACTERISTICS OF 21<sup>st</sup> CENTURY STUDENTS

Though the Information Age has led to an increased awareness that learning must become a life-long process, the majority of college students today belong to the Generation Y or Millennial cohort. The characteristics of this generation are significantly different from the Veterans, Boomers and Gen Xers that came before them, and as such, they need to be understood for the unique qualities that influence the effectiveness of their education style. According to Coates (2007), Generation Y “combines the can-do attitude of Veterans, the teamwork ethic of Boomers and the technological savvy of Generation X.” This unique mix of characteristics means that the processes and procedures used to educate the majority of today’s college students are vastly different from those that have been used successfully to educate their predecessors.

The early childhood experiences of today’s Generation Y college student majority are unique in many ways. The Boomer parents of many Gen Y students created a very structured, scheduled, organized and competitive yet child-focused environment in response to the genuine external dangers they have been exposed to during their lifetime, including the World Trade Center bombings, 9/11, and Desert Storm (Coates, 2007). As a result, many in Generation Y are not only used to highly structured and adult-supervised environments but may also lack the interactional and conflict resolution skills possessed by the other generational group (Coates, 2007). In addition, having grown up in a truly digital age, members of Generation Y have been exposed to far more media influence than their predecessors, and the impact of this increased exposure has been a link to an increased likelihood of “impulsive and restless behavior” (Yan, 2006).

These characteristics are reflected in the classroom preferences of Generation Y students, who generally prefer a more team based environment with structure and the opportunity for interaction (Coates, 2007). “This generation likes learning to be entertaining and fun, and become quickly bored in a learning environment that is not highly active and interactive” (Coates, 2007). This interactive, multi-media, group-based preference is a significant departure from both the Boomers, whose preference is to direct their own learning, and Generation Xers, who prefer self-directed projects where they can work independently (Coates, 2007). Additionally, since the Gen Y college student likely has been exposed to the most advanced technologies throughout their lifetimes, they are less interested in “a rehearsed talk or a manufactured spiel,” but rather are drawn to interactive participation and a better quality of learning through more relaxed and spontaneous experiences (Felder & Brent, 1996; McCrindle, 2001). This is important information for an educator. For institutions such as Walsh College, where courses are three hours and 50 minutes long, it can be a challenge to keep students engaged and head off boredom, a critical concern for Gen Y learning majority (McCrindle, 2001). The use of playing cards to rapidly reshuffle groups can prevent students from becoming bored and sedentary.

MBA programs have long relied on the use of group assignments and projects (Gabriel & MacDonald, 2002). These assignments not only encourage students to think about and apply what they have learned, but further allow students the ability to develop and enhance the “professional and 'social' skills which will be essential for their future careers” (Newman, Daniels, & Faulkner, 2002). Teamwork is additionally considered an important value at many business schools. Teamwork can be defined as the willingness and ability of students to work together to accomplish a goal (Williams & Duray, 2008). As a result, in many business schools on-ground class sessions include some time where the students are broken into groups.

Using team-based formats, instructors can meet the preferences of Gen Y majority, creating projects, discussions, presentations, debates, simulations, and case studies that create experiential learning (Coates, 2007). These small ‘learning communities’ within the classroom mirror the trend toward learning communities within the overall higher education environment, and represents “an intentional structuring of the students’ time, credit, and learning experiences to build community, and foster more explicit connections among students, faculty, and disciplines” (Gabelnick, MacGregor, Mathews, and Smith, in Smith, 2001). Further, studies have shown that students learning in groups will receive higher grades and learn more than students covering the same material individually (Felder & Brent, 1996; Williams & Duray, 2008). Other benefits associated with the use of the group or team-based format include decreased feelings of isolation, a sense of real-world learning, and the development of social bonds (Gabriel & MacDonald, 2002). Group activities also can be an effective method for breaking up long lectures.

There are several schools of thought on the composition of student groups. Allowing students to self-select their group may produce extremes within and across the groups. Randomization is the most common method of constructing classroom groups (Valente, Hoffman, Ritt-Olson, Lichtman, and Anderson, 2003). Random group assignment by passing out playing cards is objective and eliminates charges of discrimination and/or favoritism in the classroom. However, random assignment does not address spreading the diversity and ability levels of a class across different groups (Baker & Powell, 2000).

Shuffling groups early in the semester enables the students to get to know each other. At commuter and large schools, it may be difficult for students to get to know each other. Group assignments can help overcome social barriers, however, there can be other problems associated with using classroom and group assignments. Students with high levels of commitment and motivation may have conflict with less motivated and committed students (Gabriel et al., 2002). Practical experience has shown that highly motivated students resent students who they perceive do not have the same levels of motivation and abilities.

Randomly assigning students into different groups that change with each classroom discussion can help stimulate the poorly motivated students while not allowing the highly motivated to feel manipulated or discriminated against. Assigning group membership by passing out playing cards that are shuffled in front of the students demonstrates the randomness of group assignment. Changing the group composition on a regular basis keeps the groups fresh and minimizes some students consistently sitting back and allowing highly motivated students or leaders to constantly carry the workload for a group. This teaching technique requires planning and the advance construction of a customized deck of playing cards.

## DECK CONSTRUCTION

Constructing a customized deck of cards is fairly simple. All you need are decks of playing cards and stickers. Cards and stickers can be obtained very inexpensively at most dollar stores. The best decks of playing cards are either the jumbo sized cards or used cards from a casino. The jumbo sized cards are large enough to handle almost any stickers and the casino cards are very high quality cards that will last a very long time. Some time and thought spent on sticker selection will go a long way to prevent distraction. The ideal sticker would be small, relevant to the class topic, and possibly humorous. Stickers must be non-controversial, non-offensive, and not create distractions. The religious and cultural sensitivities of all students must be considered. For example, stickers that resemble pigs or religious symbols should not be used to avoid offending some students.

The first barrier to be overcome is the paradigm that a deck of cards consists of 52 cards spread across 4 suits. A classroom management deck should only contain as many cards as there are students in the class. At Walsh College, many of our on-ground classes are capped at 28 students. Using a deck of 28 cards, it works out well to break the class into seven groups of four students. The first split is simple, assign all of the two's to a group, all of the three to another group, etc. Breaking the class into new groups can be managed by attaching stickers to the front of the cards. The sticker assignment can be managed by building a table of the appropriate number of cards, the number of discussion groupings that you will need and the number of members desired in each group. Each grouping should be assigned one corner of the playing card. For example, the second grouping could be designated by robot stickers in the top right corner of the card. Group "A" would get red robot stickers, group "B" would get blue robot stickers, etc. The third grouping might be bird stickers in the lower left corner of the card with the fourth grouping being fish stickers in the lower left corner, and the fifth grouping might be animal stickers in the middle of the card. Table 1 shows a sample table for a deck of 28 cards.

**Table 1: Sample Sticker Assignment Table for a Deck of 28 Playing Cards**

Student	Card	Second Grouping	Third Grouping	Fourth Grouping	Fifth Grouping
1	2 Clubs	A – 1, 8, 15, 22	B – 1, 9, 16, 23	C – 1, 10, 17, 24	D – 1, 11, 18, 25
2	2 Diamonds	B – 2, 9, 16, 23	C – 2, 10, 17, 24	D – 2, 11, 18, 25	E – 2, 12, 19, 26
3	2 Hearts	C – 3, 10, 17, 24	D – 3, 11, 18, 25	E – 3, 12, 19, 26	F – 3, 13, 20, 27
4	2 Spades	D – 4, 11, 18, 25	E – 4, 12, 19, 26	F – 4, 13, 20, 27	G – 4, 14, 21, 28
5	3 Clubs	E – 5, 12, 19, 26	F – 5, 13, 20, 27	G – 5, 14, 21, 28	A – 5, 15, 22, 8
6	3 Diamonds	F – 6, 13, 20, 27	G – 6, 14, 21, 28	A – 6, 15, 22, 8	B – 6, 16, 23, 9
7	3 Hearts	G – 7, 14, 21, 28	A – 7, 15, 22, 8	B – 7, 16, 23, 9	C – 7, 17, 24, 10
8	3 Spades	A – 1, 8, 15, 22	B – 1, 9, 16, 23	C – 1, 10, 17, 24	D – 1, 11, 18, 25
9	4 Clubs	B – 2, 9, 16, 23	C – 2, 10, 17, 24	D – 2, 11, 18, 25	E – 2, 12, 19, 26
10	4 Diamonds	C – 3, 10, 17, 24	D – 3, 11, 18, 25	E – 3, 12, 19, 26	F – 3, 13, 20, 27
11	4 Hearts	D – 4, 11, 18, 25	E – 4, 12, 19, 26	F – 4, 13, 20, 27	G – 4, 14, 21, 28
12	4 Spades	E – 5, 12, 19, 26	F – 5, 13, 20, 27	G – 5, 14, 21, 28	A – 5, 15, 22, 8
13	5 Clubs	F – 6, 13, 20, 27	G – 6, 14, 21, 28	A – 6, 15, 22, 8	B – 6, 16, 23, 9
14	5 Diamonds	G – 7, 14, 21, 28	A – 7, 15, 22, 8	B – 7, 16, 23, 9	C – 7, 17, 24, 10
15	5 Hearts	A – 1, 8, 15, 22	B – 1, 9, 16, 23	C – 1, 10, 17, 24	D – 1, 11, 18, 25
16	5 Spades	B – 2, 9, 16, 23	C – 2, 10, 17, 24	D – 2, 11, 18, 25	E – 2, 12, 19, 26
17	6 Clubs	C – 3, 10, 17, 24	D – 3, 11, 18, 25	E – 3, 12, 19, 26	F – 3, 13, 20, 27
18	6 Diamonds	D – 4, 11, 18, 25	E – 4, 12, 19, 26	F – 4, 13, 20, 27	G – 4, 14, 21, 28
19	6 Hearts	E – 5, 12, 19, 26	F – 5, 13, 20, 27	G – 5, 14, 21, 28	A – 5, 15, 22, 8
20	6 Spades	F – 6, 13, 20, 27	G – 6, 14, 21, 28	A – 6, 15, 22, 8	B – 6, 16, 23, 9
21	7 Clubs	G – 7, 14, 21, 28	A – 7, 15, 22, 8	B – 7, 16, 23, 9	C – 7, 17, 24, 10
22	7 Diamonds	A – 1, 8, 15, 22	B – 1, 9, 16, 23	C – 1, 10, 17, 24	D – 1, 11, 18, 25
23	7 Hearts	B – 2, 9, 16, 23	C – 2, 10, 17, 24	D – 2, 11, 18, 25	E – 2, 12, 19, 26
24	7 Spades	C – 3, 10, 17, 24	D – 3, 11, 18, 25	E – 3, 12, 19, 26	F – 3, 13, 20, 27
25	8 Clubs	D – 4, 11, 18, 25	E – 4, 12, 19, 26	F – 4, 13, 20, 27	G – 4, 14, 21, 28
26	8 Diamonds	E – 5, 12, 19, 26	F – 5, 13, 20, 27	G – 5, 14, 21, 28	A – 5, 15, 22, 8
27	8 hearts	F – 6, 13, 20, 27	G – 6, 14, 21, 28	A – 6, 15, 22, 8	B – 6, 16, 23, 9
28	8 spades	G – 7, 14, 21, 28	A – 7, 15, 22, 8	B – 7, 16, 23, 9	C – 7, 17, 24, 10

In some courses, students are asked to bring their card to class every week for group activities and assignments. To make the card stand out, labels with the course name and faculty contact information can be applied to the back of the card. Business cards are the perfect size and can serve the same purpose. Advertising on playing cards is not a new concept and has been used heavily by cigarette companies to servicemen (Smith & Malone, 2009). Labels and business cards on the back of playing cards advertise your program and/or faculty. Figure 1 shows a scan of the front and back of some customized cards

**Figure 1: Playing Card Deck with Stickers Applied**



## PRACTICAL TIPS

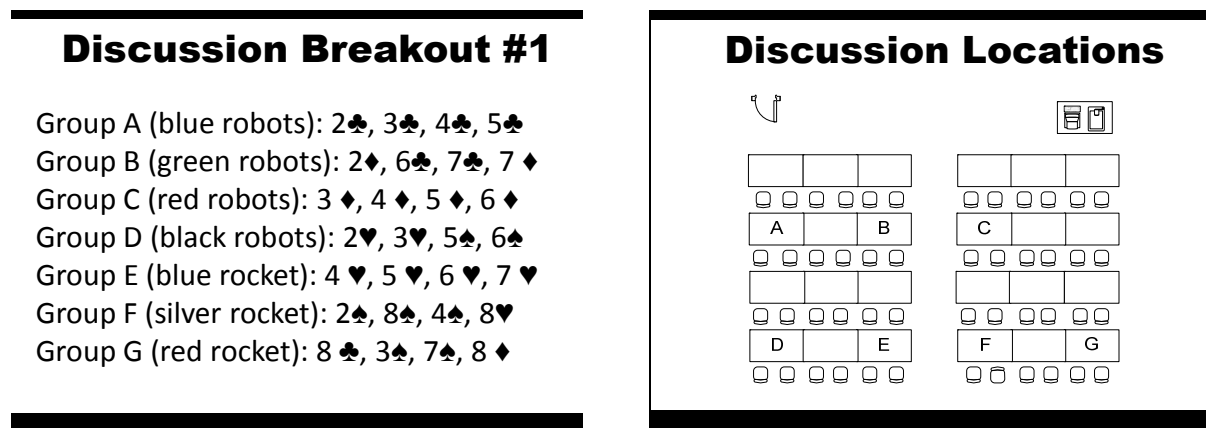
Sometimes class sizes do not exactly match the number of cards that we have prepared. The best solution is to use jokers as wild cards. The students who receive a joker can select any group that they want to join. Every course has the occasional visitor or observer. This is another excellent use of the joker card. This enables a visitor to pick a new group every time you “shuffle” up the groups and enables them to observe specific students or classroom situations.

In some classes, the students can waste a lot of time and create confusion while trying to move across the room and find their assigned group. The first and most obvious way to help this is to print up signs on colored paper that lists the team name and associated sticker. Another effective method is to incorporate PowerPoint slides that contain both a list of which playing cards belong to which classroom group. The slides shown in Figure 2 shows the group name, identifying sticker design, and the cards that sticker should be found on.

Including a diagram of the classroom layout and makeup of each group in your PowerPoint presentation can be very helpful and is easy to do. The classroom layout diagram in Figure 2 is from a PowerPoint slide that was created with Microsoft Visio in less than five minutes and represents 95% of the classrooms at Walsh College and no doubt other schools. Maintaining a library of PPT slides with the various room designs at a college is not much work and is well worth the payback received.

There will be a certain loss of cards to vandalism, theft, and forgetfulness once they are distributed to students. Some students will immediately begin peeling the stickers off the cards and others will fold or crease them. One method of protecting your cards is to laminate them.

Figure 2: PowerPoint Slides Showing Group Composition and Classroom Location



Students can be quite ingenious when it comes to manipulating the system. Group assignments are often “forgotten” or students will trade teams with other students. This can be controlled by having the students “sign in” on the first day of class and write down the card that they were assigned. If you have kept track of the deck construction, you can recreate any lost card in a matter of minutes.

## CONCLUSIONS

Group discussions and group assignments hold clear value as a teaching technique for the vast majority of students attending college today. Given the benefit that can be achieved by integrating group work into the classroom setting, it is important to have a mechanism for assigning students to groups that is free of bias and manipulation. The use of a deck of playing cards can be an inexpensive and innovative method of assigning students to groups. A little bit of planning and customization can greatly increase the flexibility and effectiveness of the cards and turn them into a powerful classroom management tool that students will remember long after the class.

Although this technique has worked well at Walsh College, it may not work as well in your educational community. Different schools have different policies and different “rules of engagement” associated with student interaction. Each school and each individual instructor, using the knowledge of their unique class composition, must decide how much group work will be assigned and which methods are most applicable and best utilized for assigning their students to classroom groups.

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# Ethics and Social Responsibility: Not Just For Chapter Six Anymore

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## ABSTRACT

Are ethics and social responsibility (EaSR) more than a catch phrase or a theoretical pyramid? Until business programs broaden EaSR to all management functions and to all business processes and levels, it just remains a mild diversion for business students and organizations. Having the management functions not connected to EaSR is like managers who might read a “Management Bible” every night but do whatever they want to do in practice during the day. Without clearly connecting EaSR within business education, it will not reach a threshold in organizational culture beyond something “nice to do when you have some extra time and money.” In other words, it’s not just for Chapter Six anymore.

**Keywords:** ethics, social responsibility, management fundamentals

## INTRODUCTION

Ever since Enron and Arthur Anderson collapsed, US colleges and schools of Business Administration have been encouraged—if not required—to emphasize the role of ethics and social responsibility (EaSR) in their various curricula. Simply making profits, it would seem, may no longer be enough, and businesses should be encouraged to “give back” to their respective communities especially when profit margins allow. Perhaps the stakeholder model is overtaking the shareholder model of social responsibility. The general approach of US business colleges and schools has been to add a specific “ethics course” to their programs, and textbooks have added or emphasized a chapter on ethics or social responsibility. But, EaSR will not impact practice unless those concepts are built into each dimension or function of management. Different texts may address EaSR in different chapters, but we simply say here, that approach is not sufficient and that EaSR are “not just for Chapter Six anymore.

## PREVIOUS RESEARCH

Tim Sanders, in his book *Saving the World at Work*, makes the argument that new millennials or younger people entering the work force will be much more focused on social responsibility and will be more demanding of it in deciding which organizations will benefit from their career efforts. In short, if Sanders is correct, those organizations that will be more successful in attracting and retaining the most talented employees in the future will be those emphasizing social responsibility as an integral part of their missions. To accomplish that end, EaSR cannot just be an afterthought to making significant material gains. Instead, ethics and social responsibility needs to be incorporated into all of the organization’s management functions. Here, we discuss what that may mean for the treatment of the traditional management functions of planning, organizing, leading and controlling (POLC).

There has been an increased emphasis on corporate social responsibility (Vogel, 2005), although there has been some debate over when that emphasis was first initiated, in the 60s or in the 90s. The approach by Campbell well illustrates the themes of that approach by organizing different dimensions into a pyramid (Campbell, 1991; Campbell, 2004). Basic to this model is its emphasis on a stakeholder versus a shareholder model. Thus, non-financial goals are recognized as legitimate. The pyramid of corporate social responsibility is very similar to Maslow’s hierarchy of needs. Economic and legal responsibilities are the bottom two levels meaning that the business must make a profit and obey the law in doing so to survive. While the model implies a distinction between economic and legal responsibilities, Campbell recognizes that the two must co-exist. The third level—ethical responsibilities—refers to cultural norms and expectations not codified into law. Businesses should conform to expectations with regard to limits a culture might impose on profit making such as not implying product benefits beyond what is specifically known. For example, *caveat emptor* (i.e., let the buyer beware) may be an accepted business maxim, but businesses that repeatedly operate beyond what a community might accept will likely lose

support from that segment of stakeholders. Finally, the highest level of social responsibility is *philanthropic*. This is where a business contributes some of its resources for the good of the community and to improve the quality of life. When a business is committed to supporting schools or re-developing blighted areas, it is operating at the philanthropic level. The basic point of the ethical and philanthropic levels is that they exist beyond the benefits limited to shareholders.

To have an impact, EaSR must be more than a catch phrase or a theoretical pyramid. Until business programs broaden ethics and social responsibility to all management functions and to all business processes and levels, it will just be a mild diversion for business students and organizations. It will be like managers who could read some “Management Bible” at night but behave any way they want to in practice. It will never reach a threshold of organizational culture beyond something “nice to do when you have some extra time and money.” In other words, it’s not just for Chapter Six anymore.

## PLANNING

Planning is a logical process that follows a series of steps to accomplish objectives (Koontz & O’Donnell, 1974). The process, either formal through written instructions and plans or informal via verbal directions, establishes coordinated effort giving direction to managers & non-managers. Planning forces managers to look ahead in order to anticipate change in order to minimize uncertainty. Good planning helps to avoid operational redundancy by reducing overlapping and wasteful activities. With a plan, managers can assess if organizational goals are being achieved and what to do if they are not. Managers must be able to make sound decisions to keep organizations moving forward. As Koontz & O’Donnell (1974, p: 51) state, “planning is the basis of all management functions since it involves selection from among alternative courses of action.”

Planning involves selecting a goal and then developing strategies to accomplish it. Goals should be specific and challenging in order to direct organizational effort and worker behavior. Often proper goal setting is described as using a S.M.A.R.T. development approach with goals needing to be Specific, Measurable, Attainable, Realistic, and Timely (Williams, 2010). As managers develop plans, strategies are formulated identifying the who’s, what’s, when’s, and how’s necessary for objective accomplishment. These processes are tracked while managers’ work continuously to garner worker cooperation and commitment through participation and worker involvement.

Planning efforts include organizations developing mission statements to describe their present business, why it exists and vision statements describing where it is going in the future. Here, linking both statements with organizational values including beliefs, traits, and behavioral norms (Thompson, Strickland, & Gamble, 2009) is critical to establishing roles of Ethics and Social Responsibility (EaSR) within the organization. By doing so, the complete cast of stakeholders that includes managers, employees, Boards of Directors, investors, customers, community, etc. can develop and to integrate awareness of EaSR and its importance to the organization.

If done well, planning improves both individual and organizational performance. However, it can also create rigid organizations that force a particular course of action. When the environment is turbulent and changing, managers need to remain flexible. Robbins and DeCenzo (2008) remind managers that intuition and creativity are important because programmed or stagnant planning and vision can cripple the organization long-term.

Why is planning important to an organization? First, it makes a difference in how well an organization performs. Research shows a positive relationship between strategic planning and performance (Miller & Cardinal, 1994; Bowman & Helfat, 2001). By planning, objective setting, and tracking performance, all reflect a call for managers to remember: what gets measured gets done. Planning develops by setting S.M.A.R.T. objectives and then guides organizational performance toward their accomplishment. Secondly, managers, in all organizations, continually face changing situations. Organizations are able cope with uncertainty because planning allows the examination of relevant performance factors. Finally, planning is a critical tool because organizations are complex because managers need the means to understand their particular situations.

Textual treatments of planning may mention that ethics is an important concept but they do not go into any level of detail on why “being ethical” is a cornerstone of good planning. Ethics in business is the application of ethical

principles, values, rules, and standards in business activities. Unfortunately, formalized ethical value statements may seem to be unimportant to new business students especially since even Enron, like most organizations, had a formal code of ethics.

The effectiveness of an ethics code depends on whether management supports and engrains it into the corporate culture. If codes are important, management must reaffirm the content, follow the rules themselves, and sanction rule violations. Only then can a code of ethics be a strong foundation for effective ethics programs. Moving up or introducing the role of ethics and social responsibility (EaSR) earlier into discussions of each management function could begin to change the impression of its being merely an afterthought. Perhaps there is need for S.M.A.R.T.E.R. goals and objectives where the ER stands for “ethical” and “responsible.” Adding those stakeholder criteria would be very important in a world where “what gets measured gets done.”

## ORGANIZING

Koontz & O’Donnell (1974) introduce the function of management, “organizing,” as a process, which includes several components. First, the organization’s structure must match its established plans and objectives because organization activities flow from these. Secondly, organizing must show where authority is dispersed so managers can develop and use appropriate managerial discretion. In any plan, organizing structure needs to mirror the environment where it exists as the third component. The fourth organizing component is the people necessary to staff the organization’s operations. People need to be grouped into activities with the required authority to accomplish work tasks. In summary, Koontz & O’Donnell (1974, p.28) summarize the organizing function as the “totality of such activities and authority relationships.”

Nearly fifty years ago, Burns and Stalker (1961) introduced two organizational designs that fit different organizational environments. Mechanistic organization designs have environments showing specialized jobs & tasks, have tightly defined, unchanging roles, and rigid chains of command to be used in stable non-changing environments. On the other hand, organic organization designs have open, broadly defined jobs and tasks, changing organizational roles, and decentralized authority for use in dynamic and changing environments. Since Burns and Stalker, organizing and organizational structure continues to undergo huge shifts in practice. Recently, virtual (networking between organizations), learning (capacity to learn/adapt) and modular (outsourcing functions) organizations are being introduced to explain how organizations continue to operate today. For most of the twentieth century, it was believed that “bigger was better,” but outsourcing and virtual organization maintain a smaller core.

However, organizing work maintains its basic elements over time: specialization (composed of small parts of larger task), span of control (number of employees reporting to one manager can control), departmentalization (structure based on function, product, customer, region, or matrix), authority (based on authority relationships in organization), centralization (decision-making authority at the top), decentralization (location of authority in lower organizational levels), and power (ability to influence decision) still ring true even today. As organizations get bigger, they almost invariably get more mechanistic and bureaucratic. This was often called the “science” of administration, even though there was very little real “science” to corroborate it.

What are the organizing areas that managers need to focus on today? Can organizing areas be developed to influence EaSR? Are there organizational designs supporting and facilitating an employee to work efficiently and effectively while maintaining an EaSR perspective? Emerging organizing issues can be found in four areas—technology, globalization, development, and change.

**Technology** The basic structures of organizations changing with telecommuting and work at home programs; EaSR must be developed within this function. Workers are becoming physically detached and separated from managers and management directions due advances in technology (computer networks), demographics (more single parents and “millennials” entering workforce), and economics (downsizing of organizations). It is becoming more difficult for organizations to stay connected to employees as work and work tasks change from full-time and “in-office” to “work-at home.” Breeding good ethics with “virtual” workers can be included when discussing the ethical dimensions of organizing. Managers may only be able get the organization connected to dispersed employees if they have developed strong value systems of honesty and integrity.

**Globalization** As organizations go global, global differences affect how the organization is structured and operated as well. Research shows strategies and structures of organizations worldwide are similar, while the internal behaviors maintain cultural uniqueness (Alder, 2008). This means managers must consider cultural dimension implications on organizational design elements. Obviously, different cultures mean different ethics. Thus, global organizations must review their environmental situations as they form and structure themselves.

**Development** As organizations build themselves into learning organizations, it acquires and shares knowledge across all functions and all levels. Organizational designs used must allow for unhindered workflows between its members. Again EaSR can be emphasized to unburden the key players in this relationship, and in this sense, organizing and structure can be viewed as a means to an end.

**Change** The organizational culture affects how EaSR impacts organizations. For example, building strong cultures with deeply held and widely shared values within virtual and globally dispersed organizations can substitute for the rules and regulations that formally guide employees and impact the organization structure. In other words, strong cultures can affect the management functions.

Organizing as a management function may not formally mention ethics as an important area in its development. It is, however, obvious that how organizations are structured will affect workers and their EaSR behaviors.

## **LEADERSHIP**

Leadership is the third of the four management functions, but it may be considered the newest in practice. The discipline of management has always maintained an uneasy relationship to leadership since early in the twentieth century. Is leadership a sub-component of management or is management merely a part of leadership?

Management's uneasy relationship with leadership was spawned, at least formally, by Max Weber who tried to develop a rational and objective approach to management. He discussed four bases of authority—legal, rational (expertise), tradition, and charisma. It became a basic tenant of bureaucratic management theory that charisma was a dangerous approach to legitimating managerial authority because of its foundation on the more personal aspects that brought more attention to the person as manager opposed to the position. While Weber's theories may actually have preceded WWII, the rise of Nazism, Fascism, and Communism certainly reinforced his concerns.

Early leadership theorists emphasized behavioral styles that produced greater levels of productivity and performance by the organization's employees and workers. First, they emphasized more democratic and participative styles as appropriate to generate the greatest levels of employee output (McGregor, 1960). Whether managers were more "considerate" or "employee-centered" versus "initiating" or "production-centered" was still considered a management style rather than a leadership style. Remember as well that Blake and Mouton (1985) actually first developed a "managerial" grid long before their "leadership" grid became popular.

Research that tested the "democratic style→happy worker→productive worker" links were mixed. Happy and satisfied workers did not consistently produce greater results. Thus situational or contingency approaches to management were considered, but they were still not labeled leadership. One management style could not consistently produce better results; managers needed the skill to adjust and to adapt to their employees and their situations. Management theory now shifted to discovering a "rational" basis for understanding when managers should be task or productivity centered and when they should be employee centered to generate the highest levels of productivity or profits.

Many contingency/situational approaches to management style were produced, all in the name of increasing results—especially, financial results. Feidler's (1967) approach was based on an analysis of the manager's relationship with employees, his level of managerial power, his expertise in completing the group's task. House (1971) emphasized the degree to which the manager's style contributed to employee goal satisfaction. Hersey and Blanchard (1988) offered an assessment of the group's readiness in terms of ability to perform and willingness to perform. The careful recitation of these situational approaches is highlighted in managerial textual renderings about leadership and all these approaches were designed to produce greater financial returns for the business organization.

Later approaches to leadership have been called *visionary*, *strategic* or *contemporary*, but they are usually treated as an introduction to some mixture of lesser theories that are currently vying for more consideration in the field, even though these newer theories began to emerge nearly half a century ago.

Conger and Kanungo's (1987 and 1998) approach to "charismatic" theory ran totally counter to basic Weberian principles of rationality and objectivity. Conger and Kanungo posited after all that leadership was, indeed, highly personal and that those leaders who had the skills and traits to motivate and to "inspire" their workers would get even higher levels of return. In this case, the organization might not need to rely on distributing its scarce resources in terms of incentives and pay as much as it did on finding those managers who could appeal to employees on a personal basis.

James McGregor Burns (1978) began analyzing political leadership, especially that of Franklin D. Roosevelt. Not only was FDR inspirational, he was able to appeal to Americans to support programs that were in the best interest of the country, but not necessarily in their personal self-interest. Burns called this "transformational" leadership—leadership that was not based on tangible transactions of incentives and power.

Another theme that gained prominence at this time was the *Servant Leadership* developed by Robert Greenleaf (1977). A key to Greenleaf's approach was that the leader was actually a servant or guide for the followers and the true test of leadership was not how productive those followers became but how well they developed to become servants and leaders themselves. This, as with transformational leadership, was a heavily value-centered approach to leadership that was not based on worker performance, productivity or profits.

Leadership theory has enjoyed a rather uneasy relationship within business management, and that is especially true for charismatic, transformational, and servant leadership. Initially, it was not desirable to have inspirational and personal leadership within the organization, because after all, if managers actually gained a "following" they could lead those followers in ways that might be detrimental to the organization or to society. Many treatments of charismatic leadership have documented the "dark side" of charisma in the personage of Hitler or Jim Jones.

Leadership theorists began to observe a relationship between the leader's style of managing and worker performance, but this relationship was inconsistent. So, contingency or situational approaches emerged as better ways to insure performance and productivity if the manager had the ability to read the situation and to match his style to what was demanded. Up through this "either-or" approach, the goal was primarily organizational performance.

More recently, transformational and servant leadership approaches emerged as more value-based theories of leadership. As such, they are probably more appropriate for emphasizing the values of ethics and social responsibility. Therefore, these more modern theories probably deserve more emphasis to promote ethics and social responsibility, rather than a long recitation of the various contingency leadership approaches.

## **CONTROLLING**

The control process involves measuring what the organization accomplishes and using that information to guide and to correct desired organizational behavior and performance. It is the process of employing organizational sanctions to reinforce desired behavior. It is often said, what gets measured gets done, and that fits well with the control function of management.

Most treatments of organizational control focus on the financial side of the equation. Profits are measured in the business world as the residual of outputs minus inputs (Profits = sales – costs). Productivity is defined in business as outputs divided by inputs (Productivity = sales/costs). It goes without saying that from a business perspective, profits and productivity will be perfectly correlated. Similarly, efficiency is defined as outputs/inputs, and thus, in the business world, efficiency = productivity. The interrelationship of these three concepts presents a rather simple task for monitoring control within an organization. But, perhaps, it is too simple. What gets measured not only gets done, but what is easiest to measure enjoys a natural advantage over what is hardest to measure.

In the business world, benefits or needs are typically defined as sales demand. A financial perspective is necessary for a business organization to survive, but it ignores other strategic objectives the organization might adopt from a social responsibility perspective. Indeed, the usual treatment of controls will focus on various types of financial reports, like cash flow, break-even, cost-benefit, budgets or balance sheets, but these all beg the question of other indicators or organizational success or effectiveness.

Balanced scorecards attempt to broaden this financial perspective (Kaplan and Norton, 2007). They also provide a longer term, more strategic, orientation to organization planning. Focusing totally on financial goals and objectives tends to promote a short-term time perspective over other long-term, strategic goals. Balanced scorecards add customer loyalty, internal development, and innovation perspectives to the equation. Organizations may be making profits in the short term, but losing customers by not improving their internal processes and their people, and/or failing to adapt or to develop new products and services that could be critical to long-term profits and survivability. In other words, balanced scorecards add longer-term measures of business sustainability, which is good, but they are all designed to promote business profits and success over time. In order for ethics and social responsibility to be added there needs to be specific measures of these concepts. In essence, balanced scorecards may need a fifth dimension.

The triple bottom line approach (TBL or 3BL) provides more emphasis on social and ecological dimensions as well as economics or profits (Elkington, 1994, 2004). TBL has been popularized for its three foci—people, planet and profits. TBL has gained some traction in the U.S. in the states of Minnesota and Oregon as well as in other countries like Ireland and Australia. Moreover, TBL places more emphasis on ecological sustainability. TBL is not simply a matter of “good corporate citizenship,” but rather, a fundamental principle of smart management. These are activities that organizations can engage in which not only positively “affect the natural environment and society,” but which also result in long-term economic benefits and competitive advantage for the firm (Carter and Rogers, 2008).

Balanced scorecards, corporate social responsibility, and triple bottom line transition controlling beyond mere profits and economic returns. As such, they deserve more attention if one wants to emphasize ethics and social responsibility. What gets measured, gets done, and what is easy to measure trumps what is hard. And, that is the rub. Profits are fairly easily measured and businesses will eventually know if they are making money or not by ledger balances, at least in the long run.

Schneiderman (1999) conducted a study of “Why Balanced Scorecards Fail,” and he predicted that they would fall on the “scrap heap” of other business fads. He concluded that non-financial metrics are poorly defined, the non-financial variables on the scorecard are incorrectly identified as primary drivers of future stakeholder satisfaction (customers, for example, may not really be more satisfied), and there can never be a quantitative linkage between non-financial and expected financial results. In other words, it is not really clear that satisfying customers and developing employees and processes will indeed enhance profits. The same concerns could be applied to the triple-bottom line.

Bourne, et al., (2002) conducted a broader range study of performance measurement that succeeds and fails. They found four blockers of performance measurement systems. These were: 1) the amount of extra effort required to develop and implement such a system, 2) the ease with which IT can access and analyze the data, 3) the consequences of the measurement—will it predict organizational success, and 4) parent company support.

Overall, ethics or corporate social responsibility must be measured to be incorporated into organizational action. Balanced scorecards and triple bottom lines are approaches to developing and adopting measures beyond mere financial returns. They suffer similar disadvantages. Non-financial goals are more difficult to measure and they may not be as critical to organizational survival as financial returns are. What gets measured gets done, but what is easiest to measure will dominate what is hard to measure, especially when there is a lack of consensus about those metrics that are more difficult anyway. But for ethics and social responsibility to impact organizations, feasible, acceptable measures of them must be developed.

## CONCLUSIONS

Although mentioned for some time, current events have led to a renewed emphasis on ethics and social responsibility in business organizations. We contend that those recent efforts are somewhat limited by relegating EaSR to a single course or even to a single chapter in a text--like chapter six. For EaSR to have an impact within organizations, however, it must be emphasized in all management functions—planning, organizing, leading and controlling. Figure 1 begins to show how ethics and social responsibility can start to be integrated in the management function discussion.

**Figure 1: Integrating EaSR with the Traditional POLC Textbook Approach**

Approach	A	B	C	D
Traditional POLC Textbook Approach	<u>Planning:</u> S.M.A.R.T. Objectives	<u>Organizing:</u> Direct Supervision	<u>Leading:</u> Contingency Leadership	<u>Controlling:</u> Financial
Integrating EaSR with the Traditional Textbook Approach	<u>Planning:</u> S.M.A.R.T.E. R. Objectives	<u>Organizing:</u> Select /Develop EaSR employee values	<u>Leading:</u> Servant or Transformational Leadership	<u>Controlling:</u> Triple Bottom Line

Elements of each of those functions deserve increased emphasis to promote EaSR. Planning should assess how social responsibility must be incorporated into organization decisions, perhaps by adopting SMARTER objectives (adding Ethics and social Responsibility to SMART objectives. With organizations becoming more organic or even virtual, inculcating EaSR values by employee selection or development becomes more important. Leadership should move beyond recitations of contingency approaches to more value-based—perhaps, “visionary,” approaches like transformational or servant leadership. Finally, the control processes in organizations should broadened beyond financial controls, and more emphasis may be desired on balanced scorecards and triple bottom lines. Feasible and appropriate measures of EaSR will need to be developed. For Ethics and Social Responsibility to impact organization values, cultures and practice-- it’s not just for Chapter Six anymore.

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# Components that Affect Success in Distance Learning as Perceived by Career and Technical Educators

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## ABSTRACT

Regardless of whether students prefer distance learning or traditional learning, teachers should strive to build quality relationships with learners. It is the duty of educators to make sure learning is taking place whether the student is physically in the classroom or online. This study analyzed data regarding career and technical educators' perceptions of student behaviors needed to be successful when taking online courses. According to the data, career and technical educators believe that students being self-motivated and being able to work independently are the two most important factors for success in online learning. Evaluation of the data further concluded that regardless of age, level of education, gender, race/ethnicity, or number of years teaching, the educators surveyed were willing to teach distance learning courses.

**Keywords:** distance learning, e-learning, hybrid, online learning, perception, web-based learning, willingness

## PURPOSE OF THE STUDY

There are several key issues facing distance education programs. One common area of interest in web-based distance education is the investigation of the effectiveness of online delivery methods of course materials. Learner characteristics, the needs of the learner, student access to interactive delivery systems, the new role of educators, site facilitators, and the student's ability to focus in the distance learning process are also areas for concern. These are all important problems that surround distance education. Failure to understand these issues could obstruct the development of distance learning in the future. The central purpose of this study is to gain an understanding of teachers' perceptions of factors that affect success in distance learning and their willingness to teach online courses.

## INTRODUCTION

Distance learning is defined as a form of education in which learners and instructors are separated during the majority of the instruction; furthermore, learners have the opportunity to learn whenever a computer is accessible to them (Johnson, 2003; Andrade, 2005, Anderson, 2008). The National Business Education Association (NBEA) believes that "an effective and coordinated distance learning program is a valuable component of the business education curriculum" (PCBEE Statement No. 65). The NBEA also believes that career and technical educators should take advantage of professional development and training opportunities offered in the uses and applications of distance learning (PCBEE Statement No. 65).

Belanger and Jordan (1999) stated that distance learning opens up endless opportunities for students that might otherwise be excluded from participating in the learning process. Mark (2009) concurred and reported that the advent of the Internet combined with the declining prices for technology in the 21<sup>st</sup> century has brought education to the fingertips to millions of people who in the past would not have had the opportunity or the means to achieve a degree. Pritchett (2010) agreed and added that increasing web-based technologies have significantly influenced the dynamics of teaching and learning. The online format has lead distance learners and their instructors into new possibilities for interaction and information access (Johnson, 2003; Pritchett 2010).

Distance learning is no longer a novel idea. According to Pritchett (2010), distance learning supplies the means to support the diverse needs of learners and educators via technology. Most of the American higher education institutions and a growing number of high schools offer some form of online courses (Donnelly, 2006). Alexander, Zhao, Perreault, Waldman, and Truell (2009) assented and conveyed that the student enrollment in distance learning is continuously increasing in academic establishments across the country.

Public school students are quickly learning what working adults have known for years: distance education can open up many possibilities (MacDonald, 2009). With e-learning, learners have the opportunity to pursue lifelong learning after graduation regardless of lifestyle or locations.

## **LITERATURE REVIEW**

### **The Evolution of Distance Learning**

Historically, distance learning was once limited to correspondence courses, radio, and broadcast television (Miller & Miller, 2000). Potashnik & Capper (1998) reported that the use of technology for distance learning is not new (radio and television have effectively been used for more than forty years). Satellites and the Internet are transforming the world into a borderless educational arena, benefiting education entrepreneurs. Technology is a major contributor to the dramatic transformation of distance learning. The growth of the Internet was so explosive, that it changed the character of delivering educational content to remote students. The Internet has become the choice for educators because it provides all the elements vital for distance learning programs (Christopher & Jaderstrom, 2004). Distance learning has on-demand delivery of video, audio text, and graphics; immediate online access to vast libraries of research materials; and real-time or near real-time interaction among instructors and students. Potashnik & Capper (1998) added that although many developing countries still have limited access to these new technologies, major new investments in telecommunications and information systems are going to dramatically improve their access.

Advancement of distance education requires far more than applications of information and communication technologies (Cookson, 2001). Berge (1997) cited that the use of computer-mediated communication in distance learning to create online classrooms has become a popular trend in distance learning; both in mixed mode with face-to-face instruction or as a sole channel of education at a distance. Technology policies and practices contain activity in three separate categories: access, use, and capacity. The most recent data suggests that access to such now-basic forms of technology, like computers connected to the Internet, has broadened significantly over the past decade (Hightower, 2009). Researchers (Remp, 2002; Alexander, Zhao, Perreault, Waldman, and Truell, 2009) over the years have examined Internet-delivery of instruction, finding that most students display positive attitudes toward using technology for learning.

### **Fostering Successful Distance Learning**

According to the NBEA, educational environments should strive to accommodate learners in the acquisition of knowledge needed to function as successful individuals (PCBEE, 2009). The ideal distance learning environment supports multi-directional communication; further, virtual learning environments can consist of mobile, electronic, distance, hybrid, and web-based instruction. Depending on the structure of the instructional program, distance learning can be a synchronous program or an asynchronous program where students work with a teacher and possibly other students in “real time,” or asynchronous where students work at their own pace on their own time (Miller & Miller, 2000; Andrade, 2005; PCBEE, 2009). Nipper (1989) discussed the need to create a sense of synchronous presence and reduce the social distance between all participants. According to Miller & Miller, synchronous programs more closely represent traditional instructor-led instruction than asynchronous programs because of the spontaneous interaction that can occur. Communication is vital to create a learning environment in which the learners can easily interact with the instructor. The instructor must create the atmosphere that fosters the necessary interaction with students. These special requirements for web-based learning environments must be considered by educators when developing instructional, communication, and assessment methods (PCBEE, 2009).

### **The Future of Distance Learning**

Online enrollment is not slowing down nor has it reached a plateau. Online education is one of the fastest growing enterprises in the United States (Luce, 2002). Christopher & Jaderstrom (2004) added that the increase in distance learning courses is both a response to student demand and a reaction to the technology that makes the delivery possible. This increase will continue as distance learning becomes more and more visible (Christopher & Jaderstrom). Allen & Seaman, (2007) agreed that with the proliferation of new online degrees and certificate programs, online enrollment is on the rise.

Pritchett (2010) stated that students and educators alike have increased accessibility to technology; however, educators are continuously challenged with the task of creating authentic, engaging learning activities for students. According to Davis and Smith (2010) educators who are aware of Internet tools and how to use them will

successfully create active learning environments. The NBEA believes that virtual learning environments should be an integral part of the education process; furthermore, educators should incorporate blogs, wikis, texts, social networks, and web conferencing into the courses taught (PCBEE, 2009). Mark (2009) concurred and added that the integration of these Internet tools are effective for traditional learning and distance learning environments. Pritchett (2010) concluded that distance learning and Internet tools should not replace traditional educational methods; in addition, contextual applications should be combined with lifelong learning.

The literature supported the conclusion that proficiency in distance learning techniques is critical for educators' and students' success in the 21<sup>st</sup> century. However, many educators and students are resistant to learn these skills. Furthermore, the literature revealed that research is needed in the area of distance learning so that improved instructional methodology may be developed and applied by business educators; consequently, making it easier for students to succeed in taking distance learning courses.

## **RESEARCH METHODS AND PROCEDURES**

### **Participants**

The population of this study consisted of career and technical educators in one region of the south-eastern United States. The researchers obtained ninety-four viable email addresses from the school system's websites. The survey was mailed to all viable email addresses.

### **Instrument Development**

The researchers developed a survey that was used to collect data. The survey instrument was a short, focused, Likert-type scale survey. The survey consisted of questions evaluating student behaviors, technology, delivering online courses, and demographics. Rating scale questions were consistent throughout the survey. The instrument was emailed through SurveyMonkey to the educators.

SurveyMonkey is the leading survey tool on the web. It allows ease of use and data resides behind the latest in firewall and intrusion prevention technology. Data was collected in a totally encrypted environment. The survey was emailed out to a sampling of career and technical educators. The survey stated the participants would remain anonymous. The participants were able to remain anonymous by accessing an attached link directly to SurveyMonkey. Therefore, respondents submitted their survey to SurveyMonkey rather than replying to the email address from which the survey was sent. Participants were also informed that the information provided would be used in a research study and would be shared. Respondents were asked to return the online survey through SurveyMonkey within two weeks. One reminder was sent to those who had not responded within the two-week time period.

### **Validity and Reliability**

The items on the researcher developed survey were derived from the research objectives of this study and the review of literature. The areas included in the review of literature focused on distance learning. A panel of experts that included educators who are currently teaching online courses were used to check the validity of the survey. The content of the survey instrument was validated by the panel. The most prominent internal validity concern in designing the survey was the presence and degree of measurement error. Developing instructions and questions that were worded clearly in the survey instrument will control the degree and presence of measurement error. Directions were used in all related correspondence to facilitate response.

Rating scales can assume different formats; however, they share a common approach because respondents are instructed to indicate their position or attitude. The reliability of any measurement instrument needs to be assessed (Pedhazur and Schmelkin, 1991). According to Shannon & Davenport (2001), the more consistent the results from a measurement instrument are, the more reliable they will be. Cronbach's Alpha was used to estimate the internal consistency of the survey.

## **RESULTS/FINDINGS**

Descriptive statistics, including frequencies and percentages, were run in SPSS to summarize, analyze, organize, and describe the data and to provide an indication of the relationships between variables. The survey instrument was

designed to collect demographic information from the respondents. Fifty-eight (58) survey instruments were used to compile data in this study. Table 1 represents the demographic information related to number of years teaching, subjects taught, race, and degrees of the respondents. The largest percent of respondents had never taught an online course (89.7%), had been teaching less than ten years (48.2%), were business and career and technical educators (73.7%), were African or Black American (74.1%), and held a master's degree (65.5%).

**Table 1: Demographic Data of Respondents**

Categories	n	Percent
<b>Online Teaching Experience</b>		
Have Taught an Online Course	6	10.3
Have not Taught an Online Course	52	89.7
<b>Number of Years Teaching</b>		
1 – 5 years	14	24.1
6 – 10 years	14	24.1
11 – 15 years	12	20.7
16 – 20 years	7	12.1
21 – 29 years	3	5.2
Over 30	8	13.8
<b>Subject Taught</b>		
Agriculture Education	3	5.3
Business Education	41	71.1
Career Technologies	1	2.6
Cooperative Education	1	2.6
Family and Consumer Sciences	6	10.5
Health Science	1	2.6
Technical Education	3	5.3
<b>Race of Educator</b>		
American Indian	1	1.7
Asian	0	0.00
Black	43	74.1
Hispanic	0	0.00
White	14	24.1
<b>Highest Degree</b>		
Bachelor	7	12.1
Master	38	65.5
Specialist	11	19.0
Doctorate	2	3.4

*Research question 1:* In the perception of career and technical educators, how important are the following factors to student success in taking online courses: (a) learning environment, (b) self-motivation, (c) organization skills, (d) communication skills, (e) computer literacy, (f) willingness to learn, (g) cooperative learning, and (h) time-management? The majority of respondents (72.9%) believe that being self-motivated is an extremely important factor to student success while taking online courses. Many respondents (62.7%) reported that computer literacy and the learning environment are extremely important for student success while taking online courses. Table 2 details the respondents' perceived degree of importance about factors that affect student success in taking online courses.

**Table 2: Factors that Affect Student Success in Online Courses**

Categories	<i>n</i>	Percent
<b>An Interruption-free Learning Environment</b>		
Not Important	0	00.0
Somewhat Important	2	3.4
Important	8	13.6
Very Important	12	20.3
Extremely Important	37	62.7
<b>Self-Motivation and Able to Work Independently</b>		
Not Important	0	00.0
Somewhat Important	1	1.7
Important	5	8.5
Very Important	10	16.9
Extremely Important	43	72.9
<b>Ability to Communicate with the Instructor</b>		
Not Important	0	00.0
Somewhat Important	0	00.0
Important	13	22.0
Very Important	16	27.1
Extremely Important	30	50.8
<b>Technologically Savvy or Computer Literate</b>		
Not Important	0	00.0
Somewhat Important	2	3.4
Important	5	8.5
Very Important	15	25.4
Extremely Important	37	62.7
<b>Comfortable Learning New Computer Skills</b>		
Not Important	0	00.0
Somewhat Important	1	1.7
Important	9	15.3
Very Important	24	40.7
Extremely Important	25	42.4
<b>Able to Work Cooperatively with other Classmates</b>		
Not Important	1	1.7
Somewhat Important	5	8.5
Important	14	23.7
Very Important	19	32.2
Extremely Important	20	33.9

Likert-type scale for each category under degree of importance: (1) = Not Important (5) = Extremely Important

**Note:** Data and information obtained from question 1 under the Student Behavior section of the survey instrument.

*Research question 2:* Do the following demographics affect whether or not career and technical educators are willing to teach online courses: (a) number of years teaching, (b) subject taught, (c) race/ethnicity of the educator, and (d) highest degree held? Survey questions 2, 4, 6, and 7 from the Demographic section on survey instrument were compared with question 2 from the Distance Learning section on the survey instrument to address this research question.

An ANOVA design was used to determine if demographic factors affected the educator's willingness to teach online courses. With an alpha level of .05, statistical significance was not reached on any of the comparisons, indicating that (a) number of years teaching, (b) subject taught, (c) race/ethnicity of the educator, and (d) highest degree held does not affect the respondents' willingness to teach online courses. Therefore, the demographic factors of the

respondent did not affect their willingness to teach online courses. No further tests were necessary. Table 3 details the findings on the willingness of the educator to teach online courses.

**Table 3: Willingness of the Educator to Teach Online Courses**

Category	df	F	$\eta^2$	p
Number of Years Teaching	5, 52	.308	.029	.906
Subject Taught	6, 51	1.032	.108	.416
Race/Ethnicity of the Educator	2, 55	.510	.018	.603
Highest Degree Held	3, 54	2.088	.104	.113

\*Statistically Significant ( $p < .05$ )

## CONCLUSIONS AND RECOMMENDATIONS

### Conclusions

The following conclusions were based on the findings of the study:

1. When asked about factors that affect student success in distance learning environments, the research revealed that educators place more emphasis on these top three factors: students should be self-motivated and able to work independently, students need a learning environment that's relatively free from interruptions, and students should possess computer literacy.
2. The data concluded that regardless of age, race, level of education, gender, race/ethnicity, or number of years of teaching experience, educators are willing to teach distance learning courses.

### Recommendations

Based on the conclusions, the following recommendations are made:

1. Student success is the primary focus of today's educational institutions. Success is not only the responsibility of the student, but rather a shared responsibility between the student, the instructor, and the school. A student can possess all the qualities of a successful distance learner, however, if there is not constant collaboration between the three, the student will not be successful. The instructor needs to make sure this collaboration takes place.
2. Since educators are willing to teach distance learning courses, they should be given every opportunity to do so. There needs to be highly qualified distance education and e-learning staff. Obtaining these highly qualified staffers requires providing resources for training, and upgrading equipment.
3. Introducing new techniques, technologies, and methodologies in distance education should be discussed between teachers and leaders. Teacher education programs should ensure that educators-to-be are well equipped to teach distance learning classes by exposing them to online teaching tools, such as Blackboard or Skill Soft e-learning software and ensuring that they know how to effectively use these tools.
4. Older teachers may be willing to teach distance learning courses; however, they may not have had the training or possess the resources necessary to do so. If current educators are willing to teach distance learning courses, they should be offered professional development training in this area along with the technological recourses that they need to be successful in instructing online courses.

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# A Redemption Strategy for Students Caught Cheating

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## ABSTRACT

This paper represents a case study into a wide spread phenomena on college campuses, students caught cheating on an exam. Three students were found to have cheated on an audit exam. An independent accounting professor was selected to enforce a redemption exercise. Each student was required to write an essay on why the experience may have negative consequences for their future careers. Based on a review of the submitted papers and follow up interviews, evidence suggests the process became a learning experience for the students and approached the highest levels of Bloom's Taxonomy.

**Keywords:** redemption policy, cheating

## INTRODUCTION

Research has indicated that academic cheating has increased at least three fold over the last 65 years, and the numbers have more or less stabilized over the past 25 years at 70% to 75% (Graves, 2008). Based on this information, instructors should recognize that cheating likely will occur in their class. Therefore, the purpose of this paper is to describe a redemption principle for cheating students and to discuss how the experience became a learning experience for the students.

The cheating incident occurred prior to the 2009-2010 academic year on a mid-size Mid-western college campus. Three students were found to have submitted the exact same answer on an audit exam when questions were scrambled. After the professor discovered the behavior, the students were reported to the administration. Further investigation by the administration, confirmed the students' unacceptable behavior. Each student was required to write a five page essay describing why their behavior was not acceptable based on ethical considerations in the accounting profession by responding to questions relevant to how their behavior would be viewed in a professional setting.

The nature of the questions revolved around the idea that there is a pandemic of cheating in educational institutions and evidence suggests that cheating in college is associated with unethical behavior in the workplace. Students were asked to explain their position and describe the severity of their actions in light of the American Institute of Certified Public Accountants Code of Professional Conduct.

The findings of this paper were based on the students' essays and follow up discussions that took place after the essays were submitted. The students were given an opportunity to discuss their experiences with an independent accounting professor, after informed consent was obtained. The reflections represent the learning that occurred.

## LITERATURE REVIEW

The literature review in this study represents publications the students were required to read and incorporate into their essays. The readings were intended to confront each student with information on how their behavior could have implications for their future careers in the accounting field. Writing the essays was described beforehand as a discovery process for students as they were confronted with evidence that their behavior had potential adverse implications for their careers.

A second literature review was performed after student reflections were collected to organize the review into implications for accounting curriculum. Thus, the literature review is organized into the following sections: (1) Why students cheat, (2) Why academic dishonesty is a bad omen, (3) A review of the AICPA Professional Code of Conduct, (4) information on curriculum deficiencies in teaching ethical behavior.



### **Why Students Cheat**

Unethical behavior seems to be increasing exponentially in every facet of today's business environment. Today's college students are growing up in a society where ethical values are declining and scandals involving dishonesty in government and business are frequent occurrences. Cheating has also increased among students with the current generation of high school students showing little sense of indignation about cheating. When the students transition to college, they already have an attitude that cheating is acceptable (Graves, 2008).

The primary reason students cheat is because of perceived pressure. Student pressure is divided into six broad categories: (1) performance concerns (failing a course, grade pressure), (2) external pressure (academic pressure, such as course load), (3) unfair professors, (4) lack of effort, (5) loyalties (helping a friend), and (6) other factors (viewing cheating as a game). Typically, students cheat to obtain a better grade and eventually to secure a job (Whitley, Keith-Spiegel, 2002, p. 23).

### **Why Academic Dishonesty is a Bad Omen**

There is a high correlation between cheating and workplace deviance, and it has tremendous implications for both employers and academicians and states that students who cultivate a cheating mentality in the academic area are more likely to exhibit the unethical behavior in the workplace (Graves, 2008, p. 21). There is strong evidence that "cheaters" engage in a higher percentage of deviant behavior in the workplace. There are numerous articles that address cheating and other forms of workplace dishonesty. A study by Sims (1993) with 60 MBA students found those that admitted to having engaged in a wide range of academic dishonesty also admitted to a wide range of work-related dishonesty. A separate study involving over a 1,000 students on six different college campuses found students that engaged in dishonest acts in college were more likely to engage in dishonest acts in the workplace (Nonis and Swift, 2001). Another study found that cheaters scored higher than "non cheaters" on measures of unreliability and risky driving behaviors (Blankenship and Whitley, 2000).

Cheating on college coursework is associated with unethical behavior in the workplace because of the relationship between academic dishonesty and unethical business practices. Sharron Graves' research sought to find if today's business and non-business students have the same tendency toward unethical behavior in the workplace as they do in the classroom. This study addressed the level of cheating among business and non-business students in high school and college and documented the students' involvement in property- and production-deviant activities. Property deviant behavior includes theft of assets belonging to the company while production deviant behavior regards the misuse of time or compromised quality of work done by the employee.

Graves' work continued the benchmark work of Hollinger and Clark (1983) who surveyed college students on deviant activities in the retail-sector survey. Graves' results were similar in property deviant behavior but more discouraging in production deviant behavior with Graves' study showing students 2-13 times more likely to engage in property deviant behavior than the earlier Hollinger and Clark study.

Harding et al (2006) have reported that there is a correlation between engagement in unethical behavior in college and engagement in unethical behavior in graduate school and professional practice, and the correlation indicates there is a relationships between college cheating and professional dishonesty and that person who engages in academic dishonesty develops less resistance to later engaging in professional dishonesty. In their study, they concluded that the perception that peers were often engaged in unethical behavior was strongly associated with cheating in college than it was to the decision to violate workplace policies. They also concluded that frequent prior cheating in high school and strong temptation to behave unethically were strongly correlated to behaving in the workplace than in the college environment.

### **The AICPA Code of Professional Conduct**

The AICPA Professional Code of Conduct is set of rules and/or bylaws outlining ethical standards that are designed to govern, monitor, and regulate accountants practicing accountancy. The Code of Professional Conduct was adopted by the AICPA membership to provide guidance and rules to all members – those in public practice, in industry, in government, and in education – in the performance of their professional responsibilities.

The Professional Code of Conduct consists of two sections: (1) the principles and (2) the rules. The principles provide the framework for the rules, which govern the performance of professional services by members. The principles speak to the public interest requirement that CPAs' work must reflect high ideals about moral judgment, commitment to the public interest, and skillful performance. The scope and nature of services refers to the issue of balancing public accounting firm's commitment to clients (giving business advice and consulting) and commitment to the public (giving opinions on financial statements) while the first section embodies principles that CPAs should adhere to, they are very general in nature, and thus not enforceable.

One of the major criticisms of the accounting profession in the United States is that it is rule-based system. The rules governing the profession can only address certain limited aspects of ethical behavior. It is impossible for them to cover all of the dilemmas that a professional will face in his or her career. Rules are insufficient because they state only necessary not sufficient conditions; their terms are ambiguous; they must be interpreted according to idealizations; they require correct motivation; they are often unmanageable; and they require us to recognize we are actually following the rule (Love, 2008).

The accounting profession in particular has significant challenges in promoting ethical behavior. While the art of accounting is ancient, the accounting profession is relatively young approximately 150 years. Certified Public Accountants need an inner orientation to the truth and some detachment from the immediate environment from ambition, money, power, fame, comfort, security, and ease. CPAs must especially be able to resist greed. The lawyer's duty is first of all to his client, but the Public Accountant has only one duty to his client and the Public and that is to disclose to him or for him the truth, the whole truth, and nothing but the truth. The inherent character of the profession is ethics. Ethics is a necessity to the professional existence not an adjunct to it (Cheffers and Pakaluk, 2005).

If the accounting profession is to fulfill its public interest responsibilities, it must restore credibility for the survival of the profession and for free enterprise itself. Part of this evolution includes the need to address the ability to teach and learn ethics, and to grow in ethics beyond the basic level of understanding and implementing principles and concepts. A large accounting firm is cited for their code of conduct that contains among others the following questions to apply to avoid a poor course of action: Does it feel right? What would a reasonable person think? Can you sleep at night? These ideas can be reinforced with accounting education that follows the framework recommended by the International Federation of Accountants: (1) gaining knowledge, (2) acquiring perceptiveness, (3) exercising judgment, and (4) planning for continued growth in professionalism (Love, 2008).

## **METHODS**

This research is based on a descriptive case study. Yin (2003) recommended the case study approach when attempting to answer a "how" or "why" question about a contemporary set of events over which the investigator has little or no control. This study was designed to gain a greater understanding of how instructors can handle cheating students. This study applied a single case design because it was used to capture the circumstances of an everyday situation, as suggested by Yin (2003).

### **Developing the Case**

The key to this study was designing relevant questions for students to respond to with written essays. Essays were designed to reflect current ethical considerations in the academic environment and current considerations in the accounting profession. The instructor needs to be aware of these conditions and a literature review can be used to help develop relevant questions. A current debate in the academic setting revolves around the question how much should academics promote ethical behavior in a business school curriculum, as some critics of business school education believe the curriculum focuses too heavily on technical training at the expense of ethical behavior. A current professional debate is whether the current code of professional conduct serves the accounting profession well as it faces new challenging behaviors in the profession.

### **Outcomes**

In 1956, Benjamin Bloom headed a group of educational psychologists who developed a classification of levels of intellectual behavior important in learning. Bloom found that over 95% of the test questions students encounter require them to think only at the lowest possible level - the recall of information.

Bloom identified six levels within the cognitive domain, from the simple recall or recognition of facts, as the lowest level, through increasingly more complex and abstract mental levels, to the highest order which is classified as evaluation.

Examples that represent intellectual activity on each level are listed here.

1. Knowledge: arrange, define, duplicate, label, list, memorize, name, order, recognize, relate, recall, repeat, reproduce state.
2. Comprehension: classify, describe, discuss, explain, express, identify, indicate, locate, recognize, report, restate, review, select, translate.
3. Application: apply, choose, demonstrate, dramatize, employ, illustrate, interpret, operate, practice, schedule, sketch, solve, use, write.
4. Analysis: analyze, appraise, calculate, categorize, compare, contrast, criticize, differentiate, discriminate, distinguish, examine, experiment, question, test.
5. Synthesis: arrange, assemble, collect, compose, construct, create, design, develop, formulate, manage, organize, plan, prepare, propose, set up, write.
6. Evaluation: appraise, argue, assess, attach, choose compare, defend estimate, judge, predict, rate, core, select, support, value, evaluate.

The goal of the student’s essays reached the evaluation phase of Bloom’s Taxonomy as they were required to evaluate their behavior in light of academic and professional standards they aspired to achieve. The primary objective of handling cheating students was to create a learning experience for students to help them better understand the ethical standards of the profession. This included readings related to current issues in academics and the profession to help them recognize that their behavior was unacceptable and could have future consequences in their professional careers.

Jui-Hung Ven and Chien-Pen Chuang (2005) developed a lexicon of action verbs related to Bloom’s six levels of cognitive behavior by analyzing job descriptions for information occupations in USA, Australia and Taiwan. In Table 8 of their paper they list their findings in an Action Verbs Lexicon containing the following number of verbs:

<b>Bloom’s Categories</b>	<b>Number of Action Verbs Identified</b>	<b>Percentage of Total</b>
Knowledge	31	9%
Comprehension	30	9%
Application	70	21%
Analysis	60	18%
Synthesis	87	25%
Evaluation	63	18%
Total	341	100%

Of the 63 verbs available in the “evaluation” category 15 seem applicable to the responses made by the three students to the whole getting caught and redemption experience. Specifically, these verbs are:

- (1) Appraise,
- (2) Assess,
- (3) Compare,
- (4) Conclude,
- (5) Contrast,
- (6) Criticize,
- (7) Deduce,
- (8) Determine,
- (9) Evaluate,
- (10) Explain
- (11) Judge,
- (12) Justify,

- (13)Relate,
- (14)Review,
- (15)Verify

The following table relates these action verbs to the student comments about their experiences.

Student	Comments (Quotes)	Applicable Action Verbs
A	<ul style="list-style-type: none"> <li>• Initially it was exciting to skate through this tough class,</li> <li>• But then I realized cheating in this class can be very costly academically and professionally.</li> <li>• I knew it was wrong, and in the end I realize I was just cheating myself.</li> <li>• At first it felt good, it was all done. Cheating is a good way to relieve stress. I was stressed out over this class, and wanted to get over it. It was tempting, and I thought I'll move along, get it over and won't have to bother with it.</li> <li>• I was scared and panicking. I couldn't sleep for three days thinking about the consequences. Feeling like a phony. I wasn't proud of myself and it didn't seem that I worked hard towards my goal.</li> </ul>	Assess, Relate  Determine, Judge  Conclude, Deduce  Evaluate, Review, Explain  Verify, Criticize, Appraise
B	<ul style="list-style-type: none"> <li>• Good grades are like money....no, they are better than money.</li> <li>• (Like) a speeding ticket.</li> <li>• (Think) about ethical behavior as a Christian</li> </ul>	Assess,  Compare,  Contrast
C	<ul style="list-style-type: none"> <li>• I started down that path and then I just ended up doing it.</li> <li>• I see how this could cause problems in my career.</li> <li>• It was a hard class, and I didn't know if I would pass. I knew I needed a minimum grade of B or B- to get a good job.</li> <li>• This has become very painful and a big waste of my time and money.</li> <li>• (Behavior was) a major violation of accounting code of ethics.</li> </ul>	Explain,  Determine,  Relate, Justify,  Assess,  Judge, Deduce,  Evaluate

While the students did not use the exact verbs identified by Ven and Chuang (2005), these verbs appear to categorize the nature of the student responses to the redemption exercise.

## CONCLUSIONS

The purpose of this case study was not to find ways to stop students from cheating. There are some positive steps that educators can take to discourage cheating such as small class sizes, multiple test proctors, unique make up exams, exam study sheets, access to old exams and most importantly test question scrambling (Hollinger and Lanza-Kaduce, 1996). The purpose of this paper however is to describe how a learning opportunity was created when an instructor was confronted with cheating students. The positive outcome in this case was that faculty took action against suspected cheaters, and students were required to evaluate their own ethical behavior.

According to the Center of Academic Integrity, assessment surveys of 10,000 faculty members found that 44% acknowledge that students cheat in their courses and they never report them to campus administrators (McCabe, 1997). This lack of responsibility sends the message that cheating is acceptable. Educators at all academic levels must take responsibility for encouraging ethical behavior among students by explicitly stating that cheating is unacceptable and violators will be punished.

Another implication of this study is that, incorporating ethical messages in business school education revitalize their commitment to ethical responsibility. It appears that there is a strong need to make ethical messages part of the core curriculum. Many commentators think that our business school curriculum approach may be inadvertently overemphasizing technical training and ignoring ethical considerations. The debate on whether ethics can be taught or not does not excuse business schools' failure to provide guidance that can be followed or ignored.

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# Using Game-Based Learning to Raise the Ethical Awareness of Accounting Students

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## ABSTRACT

The accounting scandals of high profile companies such as Enron and Arthur Andersen have created a climate of distrust and loss of confidence in the governance process in corporate America. As a result, educators are being challenged to make concerted efforts to incorporate ethics in the professional development of accounting and other business students. This article supports Game-Based Learning (GBL) and describes the development and use of an ethical awareness board game called **Do the Right Thing!** to raise awareness and promote discussion of ethical issues among 160 accounting students in a series of professional development classes at a university in the southeast. Although this article is based on anecdotal evidence, the author concludes that games can be an effective pedagogical tool when they are based on specific learning goals rather than just the concept of winning.

**Keywords:** game-based learning, games, ethics, ethical issues, Do the Right Thing!

## INTRODUCTION

Accounting scandals such as Enron, WorldCom, and other major corporations, and the recent collapse of the financial markets, have resulted in a loss of public confidence and raised the ethical consciousness of corporate America on the importance of doing business ethically. This erosion in the moral character of Wall Street has renewed discussion among accounting professors on the need to incorporate ethics in the accounting curriculum. Many believe that accounting education has a responsibility not only to enhance the competency and skills of students, but also to instill in them a sense of ethics and moral obligation. In an interview with the Wall Street Journal (WSJ Online, August 20, 2009), Robert Bruner, dean of the University of Virginia's Darden School of Business, noted that one of the lessons business students should learn from the current financial crisis is that "ethics are always No. 1." He believes business schools must share in the responsibility for the financial crisis because the tools and concepts that caused the collapse on Wall Street are taught in the classroom. Thus, as reform in corporate governance based on ethical principles becomes a reality, faculty at many colleges and universities are once again exploring meaningful ways to integrate the coverage of ethics in the curriculum. This paper supports game-based learning (GBL) using an ethical awareness board game as a methodology to raise awareness and promote discussion of ethical issues among accounting students.

## GAME-BASED LEARNING (GBL) AS A PEDOGOGICAL TOOL

The Encyclopedia of Educational Technology (2003) defines a game as:

*"A competitive activity that involves certain skills and is played under a set of rules for the amusement of the players, which compete for points or other advancements that indicate that they are outperforming other players."*

Game-based learning may be defined in different ways since the word "game" has more than one connotation. Caillois (1961) describes a game as a voluntary and enjoyable activity governed by rules, but the outcome is uncertain and the activity does not produce any goods of external value. It may involve a simulation, video, computer, role playing, cards or board game. Carson Learning Services (2009), an instructional game designer, defines it as "the process of taking an idea and creating an activity to deliver that idea in a manner that is motivating, challenging, and fun, and has a measurable learning objective as a foundation." Starting Point (2009), an on-line resource that provides information about teaching methods in the geosciences area, defines GBL as "exercises pitting students against each other or getting them to challenge themselves in order to motivate them to learn better." They indicate that three elements define an activity as a game: competition, engagement, and immediate reward.

Although there is no consensus on a definition for games and game-based learning or which types of games are most effective as a pedagogical tool, there are opinions on what attributes a game should have to be effective. To be an effective and useful learning tool, Lepper and Cordova (1992) believe learning goals must be immersed into the game and be essential to winning. Since it is beyond the scope of this article to evaluate one type of game over another, in the context of this article, GBL is defined as ‘an interactive challenging and fun activity involving a board game with defined learning outcomes.’

Ethics may be taught using many different approaches, however, it is the contention of this paper that board games, as an experiential pedagogical tool, are effective because they: (1) provide an enjoyable learning environment that enable students to learn by doing, (2) are easy to implement, (3) require no homework or grading, and (4) engage students in active learning that is retained. Games have been played in most cultures throughout history and have long been used to teach.

## LITERATURE REVIEW

### Teaching Ethics in Accounting

The financial scandals of recent years have increased stakeholders’ expectation for corporations to conduct business in a transparent and ethical manner. This increased level of expectation places a higher level of responsibility on accounting professors to include teaching ethics in the accounting curriculum. While some schools have opted to integrate ethics throughout the curricula, others have developed stand-alone ethics courses. Over the years, however, there has been much discussion about whether business ethics should or could be taught (see for example, Sims and Sims 1991; Sims 2002; Trevino and Nelson 1999), and how it should be taught. Sims (2002) provides various viewpoints and insights on the challenges of teaching business ethics. He believes ethics should be taught and that schools must take more responsibility for teaching students how to recognize and respond to ethical situations. Although he examines various approaches that may be used, he believes an experiential learning pedagogy is most effective, and notes that the two most critical components of any effective strategy for teaching ethics are defining the goals to be accomplished and a well designed outcomes assessment process.

According to Alam (1999), the primary goals of teaching ethics to accounting students is to make them aware of ethical issues in accounting, and to develop a sense of moral obligation. Several studies support the premise that ethics education has a positive impact on the ethical awareness and moral reasoning of students. A more recent study to examine this issue was conducted by Lau (2009). Using a control group and a treatment group that was taught an ethics decision making technique called the JUSTICE model, he concluded that business ethics education does matter and has a significant impact on students’ overall ethical orientation.

### Pedagogical Approaches

Various pedagogical approaches to teaching ethics have been examined in the literature. Furman (1990) and Etzioni (1991) examined the principal-based (*philosophical*) approach, which introduce students to various ethical theories and their application in resolving an ethical dilemma. They concluded that this approach is too abstract and does not consider organizational factors.

The alternative to the philosophical approach in teaching ethics is use of practical approaches, which may include case analysis, role playing, simulations, storytelling, service and experiential learning activities, games, and other scenario based methods that involve active learning. The challenge, however, is to provide students with experiences that they are likely to incur in the workplace.

### Game-based Teaching

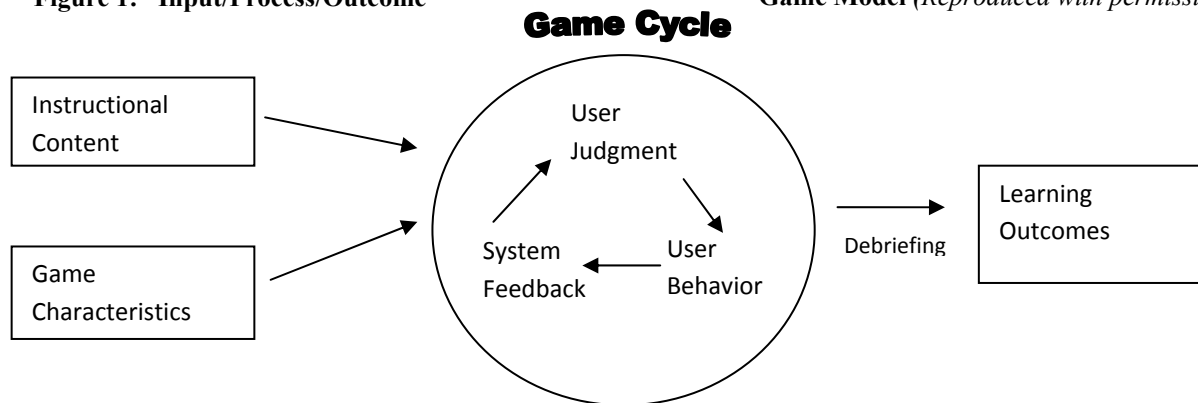
Although there is no empirical evidence on the preferred or most effective method for teaching business ethics, games may be an effective pedagogical tool. A game-based methodology using scenarios may be especially effective in teaching ethics, because it allows students to evaluate and respond to different types of ethical situations that they may be confronted with in the workplace. Ethics games also place students in a position to reflect on their own moral judgment.

The literature supports the use of games and other experiential methods to teach. For example, Garris, Ahlers and Driskell (2002) suggest that games are interactive, adaptive and have outcome and feedback value. Their game-

based input-process-output model indicates that instructional content and certain game features paired together successfully as input will create a game cycle that results in learning outcomes (See Figure 1). The model implies that people do learn from active engagement with the environment, and that learning outcomes will result when the experience is coupled with instructional support.

**Figure 1: Input/Process/Outcome**

**Game Model (Reproduced with permission)**



Reuss and Gardulski (2001) introduced an interactive game board in a historical geology and paleontology lab/course. They determined that the game reinforced learning and was effective in helping students identify and answer questions about fossils. Reese and Wells (2007) used a card game to teach academic discussion skills in an English class. They reported the game was positively received by students and effective in engaging students in conversations and in building their confidence to have conversations with others outside of the classroom. Lloyd and Poel (2008) concluded that games are effective in engaging students in ethical decision making in the engineering design process.

Prensky (2001) believe that games are effective in learning because they give us enjoyment and pleasure, intense involvement, structure, motivation, and ego gratification. They also allow the simulation of actual work environments. In addition to engaging students in the learning process, research indicates that students tend to retain what they learn if they are actively involved. Starcic (2008) reports that learning and knowledge retention is 10 times greater in game-based learning than with traditional methods.

Many major corporations, such as Lockheed Martin, Boeing, Proctor and Gamble, BellSouth, Honeywell, McDonald Douglas, General Electric, and others are using board games in their ethical training for employees. Lockheed developed the *Ethics Challenge* board game in 1997 as part of its ethics training program. The game, which is based on the cartoon character Dilbert, explores ethical case studies from real-life Lockheed Martin incidents. California State University Northridge and other engineering schools are now using this game as part of their classroom instruction (Bekir, et. al., 2001). Since 2006, Professor Alan Rolins at the University of Minnesota Duluth, has also been using the *Ethics Challenge* to teach students about ethical issues in accounting.

Haywood, et. al. (2004) experimented with an *Ethics Bingo* board game in several accounting courses. The objectives of the game included helping students to identify ethical and professional responsibilities, to enhance their critical thinking skills, and to engage them in the learning process. Although the impact of the game was not measured, feedback from students was very positive.

According to Edens and Gredler (1990), the outcome of academic games should depend on knowledge and skill, rather than luck or chance. They suggests that games may be effective in the classroom when used to achieve one of the following objectives: (1) to practice knowledge/skills already learned; (2) to identify gaps and weaknesses; (3) to review material, or (4) to develop new relationships between materials and principles. . Pivec and Dziabenko (2009) believe games are most effective where skills such as critical thinking, group communication, debate and decision making are of high importance.



Kolb's (2006) experiential learning model suggests that individuals have learned when they can demonstrate their ability to apply theories to real life situations. He purports that learning evolves in a cycle of four basic processes that includes experience (*concrete experience*), that is translated through reflections (*reflective observation*) into concepts (*abstract conceptualization*) and application (*active experimentation*). Games with learning outcomes can be designed to facilitate these processes.

## USING A BOARD GAME TO TEACH ETHICS

### Developing the Board Game

**DO THE RIGHT THING**, an ethical board game, is designed to generate discussions on ethical issues in the workplace. It is an educational tool that may be used to integrate discussion in a classroom setting or in an employee ethical training program. The game, including game board, rules for playing, playing cards and pieces were developed and constructed by the author as indicated in Exhibit B, however, a larger playing board was developed and placed on an easel for classroom use and colored stickpins were used to move around the board. The game was designed with input from students. Ethical issues were adapted from a discussion on ethics with students in an auditing course and refined by input from accounting professors. In developing the game, some basic principles were adhered to as follows:

- **Learning Outcomes** – The primary objectives of the game are to: (1) enhance awareness of workplace ethical issues; (2) enhance moral reasoning judgment; and (3) engage students in the learning process through a fun activity that provide consensus answers through discussion. Thus, after playing the game, it is expected that students will be able to: (1) recognize an ethical issue; (2) identify alternative actions, and (3) evaluate the potential out of each action.
- **Scenarios** – The game consists of ethical scenarios encountered in the workplace involving honesty, plagiarism, harassment, misappropriation of assets, use of the internet, etc. Students play in teams selected by the instructor. Each team must go around the board from start to finish collecting or paying tokens. Point values (tokens) are assigned for each response and are awarded to the team based on their responses.
- **Approach to the Game** – *Do the Right Thing* is designed to provide players with continuous challenges. As the team goes around the board, they may land on a *Take a Chance*, *Truth or Consequence*, or *Challenge square*. (See Exhibit B for example of *Take a Chance* and *Truth or Consequence* card). Scenarios on the *Take a Chance* card have four responses with varying degrees of what is “right.” The *Truth or Consequence* card has only two responses, ethical or unethical. If a team lands on a *Take a Chance* square, the team selects a scenario card and is given 5 minutes to discuss the scenario and then respond. Each scenario comes with 4 potential responses, which are read by the instructor. After the team selects an answer, the instructor engages students in a discussion on ethical-decision making using KPMG's (2007) CARE ethical decision making model. In the first step, students must *consider* all the facts and identify the ethical issue. Secondly, they *assess* all alternative actions by identifying all parties who may be affected by the situation and their rights. Third, they *review* the ethical issues and consequences of each alternative; and finally, they *evaluate* the potential outcomes of each alternative and decide on the appropriate course of action. Since there are four responses on the *Take a Chance* card with varying degrees of “right”, faculty teaching the courses were provided with instructions on how to play the game and teaching notes to enable them to discuss with students why one response is better than the other. A literature search and discussion among faculty was conducted prior to playing the game to arrive at a consensus on the responses and the points allocated to each response. The number of tokens awarded is based on the response.

When a team lands on a *Truth or Consequence* square, tokens are earned or paid based on the team's response to the situation that is ethical or unethical. After the team selects an answer, the instructor then discusses the situation using the four-step CARE ethics model referred to previously. If they answer correctly, they earn 2 tokens, however, if they answer incorrectly, they will encounter a consequence, which may require them to pay a fine, move back 2 spaces or go to jail. If a team lands on a square that is already occupied by another team, a *Challenge* is initiated. In a challenge, a *Take a Chance* card is drawn and read by the instructor. The team that responds with the best answer wins the challenge. If the challenger wins, the other team moves back to where the challenger was, but if the

defending team provides the best answer, they remain on their space and the challenger moves back to their previous space.

- **Design Rewards** – The object of the game is to learn ethical decision-making. Although extrinsic rewards are provided, students have to engage in discussion on the ethical issue and select the best answers. Awards are based on the number of tokens accumulated and may include grade points, food items, token gifts, etc. Thus, all teams may get some type of reward.

The *Do the Right Thing* ethics board game was initially used to teach the ethics module in three professional development one-hour credit courses that all accounting majors are required to complete. Although the curriculum in each course is different, they all include a module on ethics. The first course is taken during the sophomore year and emphasizes self-development. In addition to the ethics module, students work on their professional image and assess their personal interests, values, strengths and weaknesses. The second course is taken during the junior year and focuses on interpersonal development. In this course, students engage in assignments and projects to enhance their networking, teambuilding and business etiquette skills. The third course is taken during the senior year with an emphasis on leadership development.

During the first year the game was used, a total of 160 students participated that included 52 sophomores; 68 juniors, and 40 seniors. Each class divided students into teams. The number of teams in each class varied depending on the class size. Each course met for an hour each week and was taught by three different professors. Because the game does not end until each team has gone around the board from start to finish, it was played over a series of three one-hour class periods. The game has since been used in discussing ethics in the intermediate accounting and auditing courses with different scenarios.

#### **Observations on Game Use**

Prior to and after playing the game, pre and post tests were conducted to gauge the impact of the board game and the ethical sensitivity of students. Although the board game uses workplace scenarios, a questionnaire containing 12 ethical conduct issues related to academic situations that students face on a day to day basis and analogous to situations in the workplace was used. Students responded using a 7-point Likert scale. The results are indicated in Table 1.

As indicated from Table 1, it appears that students' perception of what is ethical or unethical did change as a result of playing the game. Students were also surveyed for feedback on their perception of the use of the game. Approximately 88% rate the game as a good or excellent learning tool and are eager to play it again. They provided comments, such as:

- *The game was a fun way to learn*
- *It made you think about situations*
- *Playing the game was an interesting and enjoyable experience*
- *I would like to play the game again*
- *It made me aware of situations I may face on the job*
- *I feel I'm better prepared to deal with some ethical situations after playing the game*
- *Although I didn't agree with some of the responses, I think I'm more aware now of certain ethical issues and how to deal with them*

Initially professors were somewhat skeptical about using the game, but noted afterwards that the game provided interaction and lively discussions on ethical issues. Through their discussions, they felt they were more effective in helping students understand the moral reasoning behind varying responses to some scenarios. On the negative side, some students think that it takes too long to play the game because they have to learn the rules and each team has to go around the board once before the game ends. Some also feel there should be a wider variety of situations, so each time the game is used, students are asked to submit scenarios that they would include in the game for future play. Many have been collected and are being compiled for future use.

**Table 1: Ethical Sensitivity of Students – Results of Pre- and Post Tests**

<b>Ethical Conduct</b>	<b>Ethical or Unethical? Pre- Game Mean Score</b>	<b>Ethical or Unethical Post – Game Mean Score</b>
1. Cheating on exam	6.78	7.00
2. Whistle blowing on a classmate	2.24	2.8
3. Signing class roll for absent student	2.78	5.87
4. Placing your name on a group assignment that you did not contribute to	4.12	6.74
5. Allowing another student to get credit for work they did not contribute to	5.67	6.69
6. Plagiarism	6.34	6.89
7. Allowing a student to copy your work	4.25	6.85
8. Telling a professor you are ill on day of exam because you are not prepared	2.65	5.54
9. “Kissing up” to a professor to get a better grade	3.97	5.28
10. Making personal long distance calls on office phone while at work	2.98	6.32

## **CONCLUSION AND POTENTIAL FOR FUTURE RESEARCH**

The ethical climate in corporate America today suggest that colleges and universities must do more to make students aware of potential conflicts that they may be confronted with in the workplace and provide a framework on how to deal with them effectively. Although this article is based on anecdotal evidence, it suggests that games may be an effective pedagogical tool to generate discussion of ethical issues in accounting. Although games will not resolve all of the problems and should not be used as the sole basis for teaching, there are various benefits to game-based-teaching. Games are interactive, adaptive to various environments, provide an enjoyable learning experience and can be designed to have learning outcomes.

Dr. Kurt Squire (2005) from the University of Wisconsin-Madison has been actively involved in research on games and learning for several years. His focus is on the use of digital games in K-12 schools and how they can be used to engage students in learning, how people learn from game play, and how they interpret their experience. There is a need for more research on the effectiveness of using games to teach accounting and other business subjects. Thus, it is hoped that this article will enlighten more accounting educators on the use of games, and encourage research to measure the effectiveness of using games and other experiential methods to teach ethics and other subjects in accounting.

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## APPENDIX A

### Example of TAKE A CHANCE CARD Scenario

You have been assigned to work with a colleague on a project that must be completed within three months. Your colleague has been slack in doing her share, so you have been stuck with doing most of the work. What do you do?

- a. Complain to your supervisor about the situation

- b. Do nothing. Let your colleague share credit for the project
- c. Use this as an opportunity to demonstrate your capabilities
- d. Try to solve the problem by talking to your colleague

In this case, answer ‘D’ is worth 3 points (tokens); answer ‘A’ is worth 2 points (tokens); answer ‘C’ is worth 1 point (token); and, answer ‘B’ is a penalty of 2 tokens to be paid.

**Example of a “TRUTH OR CONSEQUENCE CARD” Scenario**

You are an accountant at a major CPA firm that is assigned to the audit team for XYZ Co. You do not want to go over budget so you come in on Saturday to complete a schedule, but you don’t report the time on your time sheet.

Is this ethical or unethical?

In this case, an answer of ‘unethical’ is worth 2 tokens, while an answer of ‘ethical’ will result in paying a fine of 2 tokens.

**APPENDIX B**

**DO THE RIGHT THING! BOARD GAME\***



\*Although the game has not been commercially produced, the author will provide the board layout and instructions on playing the game to those interested in using it.

# Building Partnerships For Business Education: A New Faculty Perspective

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## ABSTRACT:

Expanding your academic boundaries from the campus to the broader community is an exciting, but somewhat daunting, prospect. The world beyond the text book is unpredictable, and involves all kinds of challenges not typically faced in the classroom. Yet it's exactly those challenges that make community engagement so rewarding. This paper is intended as a guide for business faculty members interested in exploring how to bring the community into the classroom, or vice versa. By combining literature review, reflection and self assessment, the author hopes to provide a 'starter guide' to help faculty take the engagement plunge. While business faculty often use case studies or projects that draw upon work from outside the classroom, a key point in the community engagement literature is that research questions need to be developed *with* the community. This can be particularly challenging for faculty without existing community ties. Particular emphasis is placed on determining how to *enter* local community, taking the first steps towards ongoing collaborative relationships. The paper is based on the author's experience creating a new course in community economic development over a three year period.

**Keywords:** Business Partnerships, Community Engagement, Partnership Building, Business Development, Faculty Development

## INTRODUCTION:

The study of many business disciplines is anything but theoretical. Textbook models present pieces of a much more complicated picture, yet to succeed in business students must appreciate the complex interrelationships between business concepts, people, and the political and community environments. This paper describes how a new business faculty member helped build a partnership between members of a college community and community members from a neighboring municipality, creating a junior-level course on community economic development. The primary goal of the paper is to help encourage young faculty members to explore the area of community-based business partnerships by providing an orientation to the growing literature on community research and to provide one example of how these partnerships can unfold.

The paper is organized as follows. The section "Community Based Research and Engagement: An Overview" helps orient business readers to the literature on community based partnerships. Because of the natural interaction between campus and community, knowledge of this growing literature is particularly important for people in business disciplines. The following section discusses the important differences between partnerships and projects in business education. While short community projects are easier to implement, ongoing partnerships are more difficult to develop. Then a specific partnership involving a business development course in Norristown PA is presented and described, followed by a discussion of class and community outcomes. The final section concludes and presents lessons that may be of interest to those considering this path.

## COMMUNITY BASED RESEARCH AND ENGAGEMENT<sup>1</sup>: AN OVERVIEW

While many business people take interaction with the community for granted, there is a large and growing academic literature that can be particularly helpful to business faculty. Much of the current literature on community engagement stems from the work of Ernest Boyer, long-time Chancellor of the State University of New York and president of the Carnegie Foundation. Boyer (1990, 1996) challenged the existing role of the university, charging that in order to be relevant in today's society the academy needed to become more fully engaged in the community. His call for the academy to "become a more vigorous partner in the search for answers to our most pressing social, civic, economic and moral problems" helped spawn a new "engagement" movement in higher education (Boyer 1996, p. 11). Boyer's article *The Scholarship of Engagement* helped define the field in the inaugural issue of *The*

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<sup>1</sup> While there are many similar terms, I will attempt to use the terms 'engagement research' or 'community engagement' when describing any joint work between academics and community members.

*Journal of Public Service and Outreach*, later renamed the *Journal of Higher Education Outreach and Engagement*. The movement has been chronicled in recent articles by Lorilee Sandman (2006, 2008).

As with any newer field of study, understanding and connecting terms can be a challenge. There is an overabundance of terms describing the linkage between the academy and community. Randy Stoecker lists seven similar (but differentiated) terms: action research, participatory research, participatory action research, collaborative research, community-based research, community-based participatory research, and popular education (Stoecker 2005, p. 30). In his view, all approaches focus on usefulness, the employment of diverse methods, and emphasize collaboration. Despite the similarities, Stoecker stresses that each school of thought comes from different philosophical place. For example, early action research practitioners were influenced by functional theory, which assumes that societal changes can happen gradually and that all people in a community have a voice. Practitioners of participatory research and popular education, in contrast, were rooted in conflict theory which assumes that fundamental change is needed to overcome inequities and power divides.

The deliberative democracy movement also found its roots in Boyer's challenge. Responding to the need to become engaged in the community, organizations like the Pew Foundation gathered academic leaders to discuss "how and why higher education must take a more active, engaged role in local communities." (Pew, 2004) Using the term civic engagement, members of the Pew Foundation's task force explored 'New Directions in Civic Engagement'. Similarly, Dedrick, Grattan and Dienstfrey (2008) document the results of a Kettering Foundation program focused on how to more effectively engage universities and students in issues affecting their local communities. This deliberative democracy movement stresses placing university and community on equal footings, encouraging both academic<sup>2</sup> and community members to listen, discuss and identify solutions to pressing problems *together*. Others (Ayers, 2008) discuss the role of academics as "democratic professionals" or "bridge agents" whose job is to link universities and communities.

Boyer's *Scholarship Reconsidered* (1990) helped bring the role of the community in the life—and evaluation—of faculty to the fore. Obvious roles for community engagement in the classroom involve research or case studies (i.e. academics can study a community), or as pedagogic tools that provide examples and context that make it easier for students to learn. While powerful, these approaches have been criticized as limiting. One common attack is that research should be done *with* the community, not *in* or *on* the community (Sandmann, 2006, p 81, for example) Faced with Boyer's challenge, academics have faced the question of how to position community engagement within the context of the traditional tripod of teaching, research and service. Moore and Ward (2008) document how faculty have documented and positioned engagement work during the promotion and tenure process.

Pew (2004) and Walters (2008) describe the importance of the institutional context and setting for promoting and evaluating community engagement. Pew stresses the institution's role in defining engagement. "We at the Pew Foundation think of civic engagement as the will and capacity to solve public problems. In particular, engagement is accomplished by applying faculty and student intellectual capital to address community problems; by fostering the skills and attitudes that will enable undergraduates to lead lives of civic responsibility; and by cultivating an action-oriented approach in which higher education institutions work to improve local conditions." Walters describes the importance of campus culture and pedagogic support in the success of community engagement programs. According to Walters key to the success was a "profound shift in the philosophy of the relationship between student and teacher. Put simply, this is a shift from an institution organized around the instructional paradigm to one organized around a learning paradigm." (Pew 2004, p. 195)

It is not uncommon for business faculty to follow the consulting model, where an expert is brought in to solve a particular problem. While this model fits in a corporate setting where the company has defined a research need and is paying the bill, the model is less appropriate in the community context. As academics, researchers typically have their own agenda (teaching, publishing, service) which may or may not coincide with those of the community. Academics looking for a paper to publish or subject to study may approach the community with little regard for whether they are, in fact, wanted or needed. Thus business faculty interested in pursuing opportunities in community based teaching and research should be conscious of this community context.

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<sup>2</sup> In this paper I use the term 'academic' to refer to anyone within the academy (teacher, researcher, etc.)

## PROJECTS AND PARTNERSHIPS: ESTABLISHING YOURSELF IN COMMUNITY

### Community Partnerships:

There are many excellent examples of community *projects* in business education. The VITA (Volunteer Income Tax Assistance program), for example, provides an excellent opportunity for business students to do community service and gain valuable experience. Students participating in project work go into the community and “do something”, with little knowledge or awareness of the context. Community *partnerships* are more difficult and time consuming, but have the potential for deeper and more meaningful work.

A central theme in the engagement research literature is that *the community needs to be involved in generating research questions*. If an academic is new to a community, he/she is unlikely to know what questions are truly of interest to the community, and (equally important) without participation in the question-generation process the community is unlikely to participate fully, or take ownership of the results. In short, without community involvement from the beginning a researcher may have trouble. This challenge becomes even more daunting if the academic isn't part of the community he/she wishes to study.

What does it mean to be part of a community? The idea of community is key to many literatures and traditions—from the Catholic notion of being ‘in community’ with others, to the social work notion of being in solidarity with others, to the political notion of community organizing and advocacy. Part of the academic's process must be to determine (or at least consider) what his/her relationship with, or role in, the community. The answer to this question may influence which communities an academic approaches, and how he/she approaches a community.

### Campus Resources:

Most institutions have existing relationships with a variety of communities and community partners. For many academics, the best way to start will be to talk to others on campus to learn what projects and relationships already exist. This may be easier said than done. Even colleges with existing service learning programs may not do a good job publicizing research opportunities. The ‘old school’ process of talking to people on campus may be the best way to learn about existing campus resources, and explore ways in which you can contribute to ongoing projects. While dovetailing on existing relationships runs the risk of ‘stepping on toes’, this is often the easiest and most viable way to get involved in community engagement.

If an existing community relationship doesn't exist, the challenge becomes how to identify a community and then situate one's self in that community. Again, this may be easier said than done. As Stoecker says “in some cases people may not even define themselves as a community—until a good community organizer brings them together so they can discover their common issues and complementary resources.” (p. 46)

### Knowledge of Self:

Plato's adage “know thyself” is important for the faculty member starting down the community engagement trail. While most faculty members have a pretty good idea of who they are and what their field of study is, many academics aren't great at explaining this to members of the lay public. Just as recent grads are encouraged to practice describing who they are and what they have to offer in preparation for a job interview, academics should do the same prior to talking with community members. ‘Visioning’, or figuring out an academic's long-term intentions and goals for community engagement, is something that should be done early in the process, the future path and current commitments will likely evolve from the faculty members priorities and goals. It is important that a community understand the commitment (or lack of commitment) brought by an academic. This clarity is important not just for the academic, but for the institution as well. Misperceptions about an academic's relationship with, and commitments to, a community reflect on the institution and impact future relationships.

There's an abundance of literature that talks about community, much of which seems to take ‘community’ as a given. Yet identifying, and establishing yourself within a community, is a particularly challenging task (particularly for a new faculty member) which receives relatively little attention in the literature. Communities (in our context) aren't groups of rats to be teased, or colonies of bacteria to be tested, but people with lives, problems, and egos. Fundamental to Boyer's challenge is the idea that academics don't know all the answers. They don't know all the problems either. This realization brings several questions to the fore for a would-be community researcher, such as 1) “who are you and what rock did you climb out from under?”, 2) “Why are you in my community, and what is



your agenda?”, 3) “What are you asking me (the community member) to do, and why?” and possibly 4) “How can you help me... or (even better) how can we help each other?” Academics need to answer questions like the ones posed above before entering into engagement research.

**Setting Sail:**

Once a research direction and community has been identified, the next step is to situate one’s self in the community. This may be done through the identification of prominent community members or active organizations (Stoecker’s “link people” or Ayers’ “bridge agents”). However this should be done with caution and forethought. The old expression “you never get a second chance to make a first impression” applies. The way that an academic is introduced into a community, who introduces them, and how they position themselves matter.

Stoecker calls the process of learning about a community “pre-research”, or the process of “studying the community itself to understand its leadership structure, resource distribution, organizational infrastructure, and culture. By doing so you can identify factions, uncover actual or potential resentments, and begin to get hints of what closeted skeletons and bagged cats may be lurking in the community.” (P. 81) Table 1 includes Stoecker’s suggested pre-research questions.

**Table 1: Stoecker’s Pre-Research Questions**

1. How is formal power distributed in the community or organization? Who is most influential in determining who gets and who doesn’t get? Who is connected to power holders outside of the community or organization, impacting how resources flow across those boundaries?
2. How is informal power distributed in the community or organization? Who is seen as a strong role model or source of advice, regardless of whether they occupy any formal leadership position?
3. If formal leaders and informal leaders are different people, what is the relationship between them? What is the history of their relationship? Are there long-standing resentments or unfriendly competition?
4. What are the controversial issues in the community or organization and how do people line up on those issues? Are people deeply polarized on any issues? Are formal and/or informal leaders deeply polarized?
5. Where does the proposed research project fall in this web of power and relationships? In what ways could it contribute to increased polarization or conflict between community or organization leaders and members?

The typically ‘quiet’ process of pre-research helps the academic understand the community, and starts the process of introducing the academic to the community. Pre-research is important, since without knowledge of the community and key stakeholders an academic may unknowingly alienate parts of the community and make the process of engaging even more difficult.

**THE NORRISTOWN PARTNERSHIP**

As a new faculty member at a small Catholic liberal arts college I was excited by the emphasis the entire college placed on social justice and community engagement. The college’s motto “Service Beyond Ones’ Self”, and the title of their new curriculum “Justice Matters” provided clues to the importance of outreach within the campus culture. While the desire to become engaged in the community resonated with me personally, I wasn’t at all sure how this would impact my academic life.

During my new faculty orientation I had the good fortune to sit next to the Business Development Coordinator from Norristown, a neighboring community that the college had targeted for outreach work. Coming to academia from the small business world, the conversation about the city's business development challenges flowed easily. The conversation continued, on and off, through the academic year. I met with city representatives who had a small amount of funding to create a Small Business Assistance Center. Yet the funding and fit weren't quite right. The following spring my city contact posed the question "why are there so many empty retail spaces downtown?" We discussed the possibility of conducting some consumer and or business surveys to start to better understand the problem, and an outreach project was born.

Little did I know that the birthing process would be such a long one! I applied to teach one of the college's junior level Engagements courses the following spring, and also applied to participate in an Engagement Scholarship workshop at Penn State the coming fall. I brought my plans (and enthusiasm about having met a community person who was interested in working with me) to the workshop, and my education began. "And what do people in town think of the city government?" the engagement research veteran running my session asked. Of course I hadn't a clue, but started to realize that how I entered the Norristown community (and who I entered with) would likely impact how I was perceived, and how willing people would be to work with me.

As I continued to work on my course plans, I also came to the realization that my main goal was to develop positive, ongoing relationships in the community (not just to conduct a one-time survey). With the help of my wonderfully helpful city contact, I developed a course where my students would not only conduct a survey, but also explore six different business development strategies that other county seats had used to help revitalize their economies. Based on conversations with my city contact, I knew that each of these strategies were being discussed or implemented on some level in the community, but I knew nothing of the actual experiences or needs of each of the groups. After studying how similar strategies were undertaken in other communities, my students spoke with members of the local community and started to learn and imagine the opportunities in town. The semester-long project culminated in a series of student presentations in Town Council Chambers. About 15-20 community members attended, actively asking questions of the students. We also created a companion website where community members could view our research results.

This initial course ended up being a great 'point of entry' for me into the community. While relatively little course content was truly developed *with* the community, the student conversations with many local organizations helped students (and me!) to get to know the players, establish contacts, and start to get to understand the real issues of the community. As the semester ended, I struck up conversations with community members on several themes related to economic development.

As fall approached, an opportunity to participate in a newly-formed Arts Task Force arose. The task force was made up of members of the local arts, government and business communities, and had a vision of creating an "Arts Hill" as both a destination and an engine for community development. The following semester a group of junior business majors worked with various task force committees to develop, promote and staff a first annual Norristown Arts Festival. This experience provided the students with a very real opportunity to participate in a community development initiative. In addition to putting their business skills to good use, the students began to see and understand the dynamics of working with an all-volunteer organization (as I'm sure the volunteer committee began to understand the dynamics of working with a student group.) Students assisted the logistics, marketing, program design, fundraising and real estate committees as they worked toward the festival launch. .

## **CLASSROOM AND COMMUNITY OUTCOMES**

The Norristown Arts Task Force had its first meeting just weeks before the start of the semester, and had identified April 24<sup>th</sup> as the target date for their first ever Festival on Arts Hill. This timing was both perfect... and a bit scary. Part of a new "engagements for the common good" course series that is intended to have students apply what they've learned in the first three years of college to advocate for some sort of real change, so from that perspective the opportunity was ideal. Students would be able to work alongside community members as they developed the first big step towards revitalizing the community through the arts. While the task force was newly formed, committees had been established (and committee chairs appointed) to work on the major aspects of the project

(logistics, marketing, program, fundraising, and real estate). Students would be able to apply their different business skills to help make the event happen.

Students began the semester by reading a book on community economic development, *City Making: Building Communities Without Building Walls* by Gerald Frug. This text provided a broad legal, historic and political context through which students could view the problem of community economic development. The class also broke into groups and studied how six neighboring communities had leveraged the arts (with varying degrees of success) to help drive development. By studying these local communities, students began to understand what Norristown was trying to do, and began to appreciate the challenges the community would likely face. Students made PowerPoint presentations on the other local initiatives, and created a summary of ‘lessons learned’ which was presented to the task force. This information was posted on a website ([www.norristownartshill.org](http://www.norristownartshill.org)) that the class helped to create to support the Arts District<sup>3</sup>. As students worked on their separate tasks throughout the semester, the website became a convenient way to communicate with the community, and was an important contribution to the partnership.

As students were learning about how arts districts work, the task force began to identify everything that would need to happen for the Arts Hill “launch” to take place. I attended the bi-weekly meetings of the task force, orienting the students to what was happening, and eventually assigning groups of students to the different committees. I positioned myself as a project manager, assigning students to work with specific committee members and then monitoring progress from a distance. For me, an important outcome of the course was for students to work directly with community members. While we discussed both the fact that committee members were unpaid volunteers, and that since this was the ‘first annual’ event, part of the challenge would be to figure out how the students and community members could best work together toward a common goal.

Several students stood out, learning desktop publishing software for program design, recruiting area performers, and even signing up the college dance team to perform in the Arts Festival. Student leaders emerged from the different groups. Students were responsible for logging their group-related activity and discussion on a course blog and journal, so that I could monitor their progress. While some groups struggled to work together, I encouraged them to work through their differences (which I also felt was an important outcome for the course.)

On the day of the Arts Festival, each student served as a volunteer. Some students helped usher performers to and from the various performance areas, others helped community members park, and others staffed an information tent. Each wearing their Arts Hill tee shirt, the students were a visible presence at the festival and a real help during the day of the event. While I had hoped that the students would enjoy the experience, I was pleasantly surprised during the class following the festival. For the first time all semester, every student was present, seated and alert prior to the start of class. It was clear from their faces and disposition that they felt proud about what they had done.

At the end of the semester each student wrote a reflection and filled out a survey asking them to rate their fellow students, their community partner, and their professor. While enthusiastic about their participation, many students commented about the difficulty they felt the community would face in making the Arts Hill a success. Drawing upon the case studies they had conducted earlier in the semester, it was heartening (as their teacher) to see them making the connections with their earlier classroom research, even if the implications for the community were not entirely positive. I think they got the lesson that transforming a community isn’t an easy job!

## **SUGGESTIONS AND LESSONS LEARNED**

Involving community partners in your teaching and research can be rewarding on many levels, but it is not easy work. While I will certainly continue to learn as my partnership work and experience expands, these initial experiences and insights may prove valuable to others who join into this engaging field. Some key ‘lessons learned’ from my initial experiences include:

- To *partner* with the community you need to be *part* of the community. To paraphrase Brother Raymond Fritz, a campus-community partnership veteran from the University of Dayton, campus-community

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<sup>3</sup> More specifically, I created a website for the Arts organization. This became both a personal contribution to the community effort, as well as a convenient place for me to post student work. Faculty members must be active partners with the community groups with which they work; it’s not just a student project.

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partnerships depend on faculty members to be active, long-term members of the community. For those eager to “jump in” and “get something done” it’s important to think long term. Building the trust and relationships that are needed for productive work to take place takes time and work. Choose issues that you believe in, and meet your personal objectives. Partner work doesn’t obey the typical boundaries of the classroom or semester; go in realizing this.

- You may work at a university and have a degree, but you’re not the only one who knows something. The discussion of ‘equal partnerships’ in the literature means that you should expect to learn from the community, just as they will hopefully learn from you. An important theme in the literature is that research questions should emerge from the community; you can’t arrive there armed with the question (and perhaps the answer). Only time, discussion and trust can help ensure projects unfold that truly benefit you, your students, and the community partners.
- Recognize and utilize your campus resources. Most universities have faculty, staff and other resources that can help you get started. While you may be following a personal interest, it’s important to do so in concert with others on campus if only to ensure that your institution is aware of what you’re doing. More likely these campus resources will be important parts of an ongoing community partnership.
- Uncertainty is something that many academics (and students) dislike, yet uncertainty is a reality. Businesses launching a product don’t know how consumers will respond. Nor do marketers know with certainty how to leverage new technologies. Life in the business world requires students to manage uncertainty. Teachers entering the world of partnership work must do so expecting that uncertainty will be part of the package. While you can plan *for* uncertainty, you must still let events unfold without dictating the results. This is difficult for many of us.
- Be alert to non-traditional learning outcomes and aware of possible problems. Life outside the classroom is different, so the traditional ways we learn and assess in the classroom may not translate completely to partnership work. The challenge of working through issues with community members is an important skill that isn’t easily captured on a test, so you’ll need to work on developing ways of assessing student learning. You should also be aware that traditional course evaluation rubrics may not “fit” as nicely with a community-based course as with a traditional class. Be prepared to assess and defend what you’ve done in class.
- Process is important. The literature on community scholarship stresses that the way you go about engaging a community, developing a problem, and executing work may be as important as the actual work that is done. Much community work will be done collaboratively; don’t forego process in order to get the results you feel you want or need.
- Have fun. Community work will likely take more time and effort than traditional classes or research, so make sure you’re having fun and doing something that is personally rewarding.

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# Leadership and Professional Development: An Integral Part of the Business Curriculum

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## ABSTRACT

It is generally recognized that many business students lack “soft skills” that are necessary for success. This is particularly true of business students from economically and socially disadvantaged backgrounds. First generation college students and students from “working class” backgrounds often begin their careers in business without exposure to the norms and expectations of professional or corporate culture. The intricacies of American corporate culture, and particularly the “soft skills” needed to survive and thrive in a business environment, are foreign to them. Technical business courses do not adequately emphasize “Soft Skills” such as resume writing, business ethics, team building, interview skills, leadership, group dynamics and business etiquette. This paper describes a curriculum program model that addresses the challenges of promoting soft skills within the context of a typical business curriculum and offers insights into the challenges and achievements of the program.

**Keywords:** Curriculum, professional development, soft skills, learning goals

## INTRODUCTION

The fundamental purpose of management education is to produce graduates who can compete for getting challenging positions and become successful business leaders. In addition to technical knowledge, business graduates need “soft skills” – such as leadership, communication, team building, group dynamics, business etiquettes, business ethics, interview skills and many others. These skills are not strongly emphasized in technical business courses. A report in 1999 by the Business-Higher Education Forum, *Spanning the Chasm: A Blueprint for Action*, pointed out that many college graduates were lacking nine key attributes necessary for today’s high performance jobs. These traits were leadership, teamwork, problem solving, time management, adoptability, analytical thinking, global consciousness, and basic communication. While a few students may already possess these skills many others may have to make special efforts to acquire them. The “soft skills”, help the students to develop self-esteem and assertiveness that is so crucial in completing the program of studies, perform well during job interviews and become successful business leaders.

## PROFESSIONAL DEVELOPMENT AND SOFT SKILLS TRAINING

As the job market for business graduates becomes more competitive, business programs must develop creative and innovative ways to provide their students with a competitive edge. The business community has come to the realization that teaching student technical skills, while certainly necessary, does not guarantee that the student will make a good employee or a good leader. Communication skills, teamwork capabilities and leadership skills are equally important in determining success in the workplace and the ability of a business graduate to secure an initial position and advance within an organization (BizEd, September 2002, <http://www.cbsnews.com/stories/2007/03/29>).

The problem has been that, while businesses have increasingly recognized the need for employees who possess “hard” and “soft” skills, the educational community has been slow in providing opportunities for students to develop these skills (Wilhelm, 2002). The result has been what has been described as a “skills gap” that separates academic from social and behavioral skills and that often leads to poor job performance, especially among young people just entering the workforce (Smith, 2002). CollegeGrad.com (May 2006) released the results of its survey on what employers want most in hiring new college grads. The criteria that the employers ranked as most important are as follows: The student’s major (37%), interviewing skills (25%), internship/experience (16%), GPA, computer skills, personal appearance, college student graduated from, and other miscellaneous qualifications (22 %).

The impact of this skills gap has been such that companies have found a need to engage in additional training of employees in order to develop leadership, teamwork and communication skills, among others (BizEd, July 2007).

The past few years has also seen the emergence of a number of private training and consultation firms focused on employee training in the soft skills (see for example, [www.intuology.com](http://www.intuology.com)). Software has also been developed to assist businesses in developing the soft skill related capacities among their employees (see for example “Softskills for Business at [cpuventuretech.com](http://cpuventuretech.com)).

In a 2002 Wall Street Journal Article, author Ronald Alsop reports that “soft skills such as leadership, communication and the ability to work in teams, are just as important as the hard stuff.” (Wall Street Journal, 9/9/02). In a more recent article, Alsop reports that corporate recruiters continue to find leadership and communication skills lacking among business graduates. It is these skills which “quickly distinguish the stars.” According to one corporate recruiter interviewed by Alsop, leadership is “the great differentiator” and “the top schools do a great job developing managers. What is needed in more leaders.” (<http://www.careerjournal.com/myc/school/20060117-alsop.html>).

Rubin and Dierdorff’s seminal study of the relevance of the MBA curriculum to managerial needs found, that while employers highly valued soft skills including leadership and communication skills, students often undervalued the importance of such skills (Rubin and Dierdorff, 2009). Capabilities ranked high by industry respondents to the study’s research instrument included writing skills, knowledge of general business management, quantitative analysis skills, cultural/gender awareness/sensitivity, and oral presentation skills.

In the cross-disciplinary and highly technically-oriented field of agribusiness, Litzenberg and Schneider (1987) surveyed 543 agribusiness employers and asked them to rank alternative skills and characteristics of the graduates. Among the many skills listed, interpersonal skills were ranked the highest. The outcome of the study was a recommendation to educators to address the development and improvement of interpersonal and business skills. On a similar study, Onianwa, Okwudili, et. al. (2005) studied the profiles of agribusiness firms and the skills and experiences required for a career in Agribusiness field. Their findings are consistent with the previous study in that, interpersonal skills, communication skills, ability to use general computer software, and business and economic skills were important.

Fields outside of business, such as engineering and health career have shown increasing interest in the idea that people in managerial positions cannot rely solely on their technical competence in accomplishing tasks. Managers must also demonstrate and develop soft skills that facilitate the ability to lead and direct teams toward common goals (Karla and Karla 2010, Thilmeny 2009, Harris and Rogers 2008). For example, in a study examining the emphasis given to technical qualifications versus soft skills in hiring decisions, Prabhakar found that hiring decision makers placed more emphasis on the soft skills “phase” of the hiring process in the information technology field. The conclusion is that technical competence, as demonstrated through objective qualifications, is important in getting potential job candidates through the door, but that the demonstration of soft skills is often necessary to “close the deal”. (Prabhakar 2004).

Much of the work on developing soft skills among business graduates and graduates in other technically oriented fields has been done in the US in response to the skills gap perceived in the US workforce. However, the idea of soft skills training is gathering attention in a number of international contexts. For example, there have been several initiatives toward increasing the marketability of Indian graduates in various institutions across India, for example (<http://www.thehindubusinessline.com/2004/12/21>, <http://www.hinduonnet.com/thehindu>). In South Africa, the ongoing transition away from Apartheid, the resultant expectation of cultural diversity and the integration of formally marginalized populations into the professional workplace has magnified the need for increased training in this area (Thomas and de Villiers, 2001, April and April, 2007).

In response to the need to develop soft skills among business graduates, several well-known business schools have developed programs and courses to teach leadership and other “soft skills” to business graduates. For example, in 2007 the Stanford Graduate School of Business begin requiring all first year students to take personality tests, participate in teamwork and management simulation exercises and critique their people skills beginning this fall (Wall Street Journal, February 12, 2007). MIT’s Sloan School of Management added classes and workshops on relationship building following feedback from corporate recruiters that criticized their graduates’ leadership skills. Dartmouth College’s Tuck School of Business initiated a similar program to build communication skills among its graduates following similar feedback (<http://www.careerjournal.com/columnists>).

Other schools have developed specific courses or modules within courses to develop soft skills. The difficulty of seriously improving communication and leadership skills within the length of a single course is obvious. Students come into their academic programs with widely varying personalities, dispositions, life-experiences and pre-existing skill sets. The curriculum described in this paper is meant to provide each student with exposure and practical experience relevant to integrating soft skills into the business curriculum and fostering the ability to utilize these skills throughout their careers and in everyday life.

### THE LAPD PROGRAM MODEL

In order to address these short-comings, the Business Program at SC State introduced a unique program in 1997 called the Leadership and Professional Development Program (LAPD). The structured program of LAPD consists of professional development courses that the students must take in their sophomore, junior and senior years, participation in the Executive Speaker Series, and the completion of an experiential learning experience. The LAPD program has generally enabled the students to enhance their self-esteem, interact with business executives, take leadership responsibilities, get internship opportunities, and be prepared for careers in business.

The Leadership and Professional Development Program (LAPD) is designed to equip students with the “soft” skills necessary to successfully advance in their careers as responsible corporate and community citizens. Every business student at SCSU is required to complete a sequence of courses that make up the Professional Development series. Students must also participate in activities related LAPD in order to successfully complete these courses. The LAPD model is based on multiple levels of leadership and accountability training which encompass the total development (personal and professional) of the individual. The curriculum is designed to enhance and supplement the academic experience of students.

The program involves a series of modules and activities designed to develop core skill sets that are necessary for career success. These skill sets include (1) employability skills; (2) business protocol; (3) business communication and technological competency; and (4) leadership development. Table 1 provides a summary of the major competencies represented in the LAPD program and the operational definitions developed at SCSU for each competency. The competencies and the definitions were developed by SCSU faculty based on data from students, faculty and the business community relative to the need for professional development and the critical areas of focus.

**Table 1: LAPD Program Core Competencies**

<b>Core Competency</b>	<b>Definition</b>
Effective Communication	Ability to express and comprehend ideas verbally and in writing
Self Awareness & Development	Ability to identify personal interests, values, strengths and weaknesses, and project a professional image
Networking	Ability to build internal and external relationships through strategic alliances
Team Building	Ability to understand group dynamics and work effectively within a team to accomplish a common goal
Honesty & Integrity	Ability to build trust; to understand the ethical culture of a business
Business Etiquette	Ability to interact and dine with professionals
Organizational Savvy/Business Protocol	Ability to master the art of doing business in the market place; understand formal and informal structures within an organization; value and manage diversity
Leadership Development	Ability to develop and implement projects; develop leadership qualities
Career Marketing	Ability to market one's skill sets and abilities through effective resume writing and interviewing skills
Technological Competence	Ability to understand and integrate the use of technology to accomplish business objectives



Throughout the LAPD curriculum, students are exposed to practical, professional and experiential knowledge that complements business content and academic skills. The curriculum is designed to ensure that students are adequately prepared to meet and master the challenges of the professional world by complementing their “book learning” with marketable life skills. Students are also exposed to the concept and parameters of ethical business behavior throughout the LAPD curriculum.

The series of courses begins with a self-development course and ends with a required experiential learning component. The goal is to develop students’ professional maturity in a way that enables them to handle the pressures of a diverse and competitive workplace. Self-development, interpersonal development and leadership development form the foundation of the program. LAPD students are required to attend weekly meetings of the Executive Speaker Series and leadership development workshops, where they receive advice and inspiration from corporate executives. The three professional courses that are mandated in the business curriculum meet one hour each week. The experiential learning course (SB 400) may be taken any time after completing the first professional development course (SB 201), but is recommended after completing SB 301.

Each course in the LAPD curriculum is designed to ensure that students acquire and develop specific competencies. The competencies for the four one-hour SB series are as follows:

**Table 2: LAPD Course Competencies**

**SB 201 - Professional Development I - Self-Development**

<b>Competency</b>	<b>Description</b>
Self-Awareness	Ability to identify personal interests, values, strengths and weaknesses, and preferences
Company and Career Research	Ability to locate and utilize information sources to conduct company and career research
Time Management	Ability to prioritize assignments and manage time effectively
Career Marketing	Ability to market one's skill sets and abilities through effective resume writing and interviewing skills
Image Consciousness	Ability to project a professional image through attire and demeanor
Business Ethics	Ability to build trust and internalize honesty and integrity

**SB 301 - Professional Development II - Interpersonal Development**

<b>Competency</b>	<b>Description</b>
Networking	Ability to build lucrative internal and external relationships
Team Building	Ability to understand group dynamics and work effectively within a team
Business Protocol	Ability to understand formal and informal organizational structures and cultures
Business Etiquette	Ability to apply accepted business etiquette in dining and other situations
Business Ethics	Ability to build trust and internalize honesty and integrity

### **SB 401 - Professional Development III - Leadership Development**

<b>Competency</b>	<b>Description</b>
Leadership Dynamics, Responsibilities and Development	Ability to define leadership, recognize leadership styles/personalities and internalize leadership characteristics and roles
Leadership Communications	Ability to apply effective communication and persuasion strategies
Negotiation Strategies	Ability to apply successful negotiation strategies
Managing Diversity	Ability to effectively embrace and utilize differences for common gain
Management and Strategic Planning	Ability to apply management and planning strategies
Business Ethics	Ability to build trust; to internalize honesty and integrity

### **SB 400 - Experiential Learning**

<b>Competency</b>	<b>Description</b>
Workplace Experience	Ability to perform as a professional in a work place setting

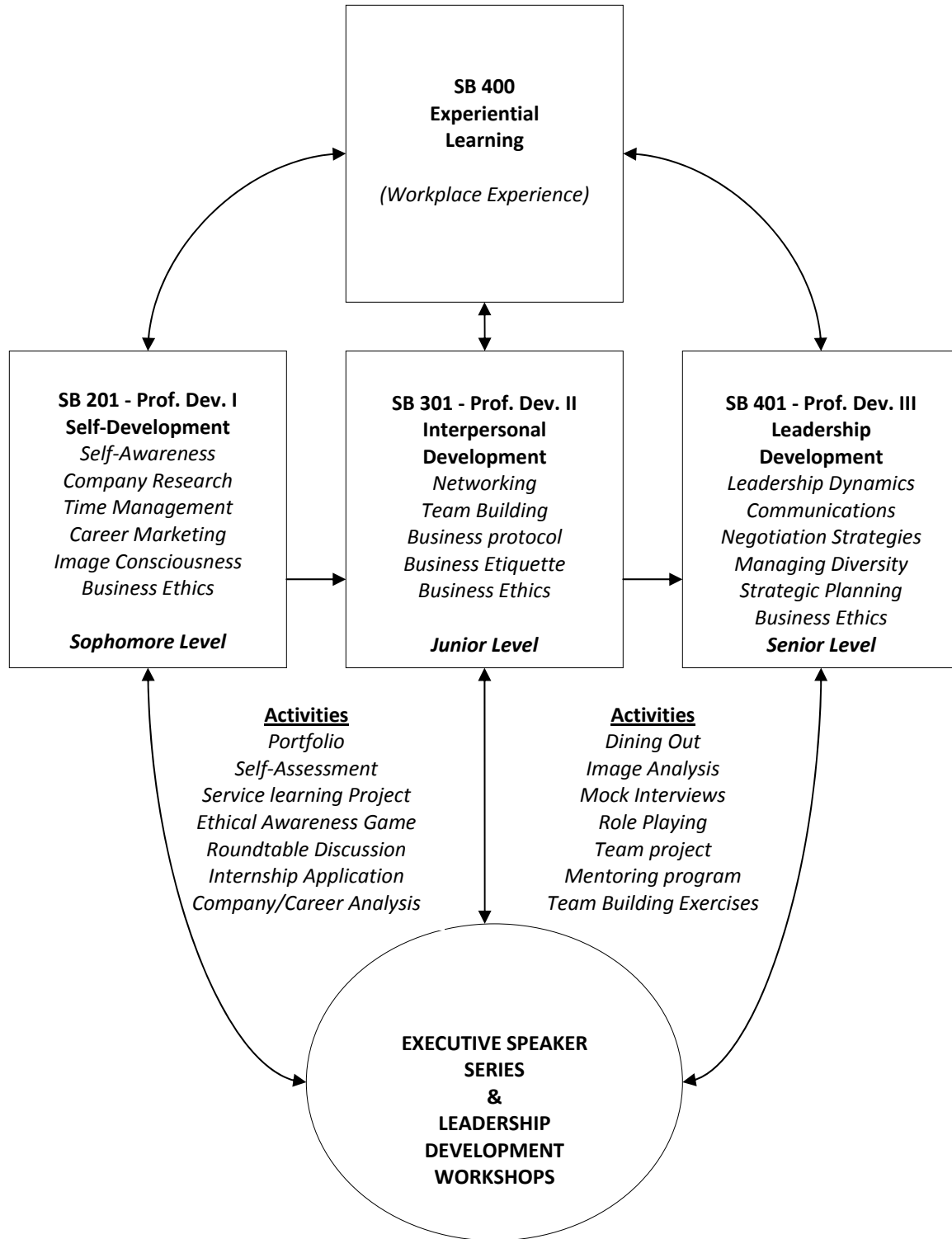
In addition, all students enrolled in the SB courses are required to attend the weekly Executive Speaker Series (ESS) program as a laboratory requirement. Twenty percent of the student's final grade each of the SB courses (with the exception of SB 400), is given based on attendance and participation in the ESS program.

ESS was implemented at SCSU in 1996 as a regular and required component of the professional development series. Since its inception, key executives from across the United States and around the world have come to SCSU to interact with students and to provide their personal and professional insights on a broad array of topics ranging from contemporary business events and issues to their own personal life histories and professional challenges. In addition, executives participating in ESS often provide students with key insights on developing skill sets that are needed to be successful business leaders. The executives' public presentations are attended by every student enrolled in the professional development courses. Smaller groups of students are also given the opportunity to interact with the executives during a "roundtable" discussion featuring approximately 12 students selected from the SB classes and via a luncheon featuring approximately six students and members of the faculty and university.

Students are required to follow codes of dress and conduct that are meant to reinforce the importance of professional decorum in United States business culture. The dress code mandates style and color of clothing for males and females. Conduct codes mandate appropriate behavior during the presentation including the preferred method of asking questions and identifying oneself to the speaker. These codes are strictly enforced in the classroom and during the ESS events. Students who fail to comply with the dress code, for example, are barred from entering the ESS presentation or participate in ESS activities. The negative sanction of losing course grades due to failure to comply with conduct and dress codes fosters high compliance rates during the ESS series and engenders a sense of discipline that becomes part of the students' life experience.

The various components of the LAPD program form a self-reinforcing curriculum that raises the level of professional development through each of the requisite courses while adding new sets of skills and personal and professional growth opportunities.

Figure 1: The LAPD Model



The first module “Self-Development” is addressed in the SB 201 class and is meant to provide the initial opportunity for the student to truly assess and reflect on their decision to pursue a business degree as a step in developing their careers. Students are challenged to think critically about their choice and about what it means to choose business as a career. Course assignments in SB 201 focus on identifying individual strengths, weaknesses and aptitudes. Students are required, for example, to complete the Keirsey Temperament Sorter ([www.keirsey.com](http://www.keirsey.com)) to identify their temperament type and to relate the results to their field of study. Students begin the process of building a personal “portfolio” that includes the results of aptitude tests and personality assessments along with their own written self-assessment, mission, goals, objectives and personal strategic plan. Students are also required to do further work in exploring the specific major business area they’ve chosen (accounting, marketing, etc.) and to develop a clear understanding of current issues in the field and opportunities for future employment or entrepreneurial activities.

This first course in the LAPD sequence also provides the first opportunity for students to begin developing their ability to market themselves to future employers. Students in the course are required to develop a professional resume and to develop letters of inquiry and introduction as part of their portfolio. They also are required to attend an interviewing seminar sponsored by the University’s Career Center.

A listing of specific course competencies and measurable outcomes for SB 201 is included below:

- Develop a web-based portfolio
- Understand how temperament and preferences affect personal and professional relationships
- Develop a personal mission statement and understand its impact on success
- Be able to perform on-line and library searches for information on career choices and industry information
- Compose a professional resume that presents experiences and qualifications in an optimal manner
- Compose a letter of application and thank you letter for a job opportunity
- Apply recommended interviewing techniques to optimize success
- Understand and implement corporate and business casual dress codes and the components of a professional image
- Practice correct etiquette in business and personal settings
- Understand the importance of ethics in business practices

The next course in the sequence, SB 301, builds on the focus on individual achievement and responsibility and introducing the concept of teamwork as a critical component of business success. In this course, students are required to complete a number of exercises and assignments meant to reinforce group participation and cooperation. The major assignment for this course includes a “Service Learning” project in which students are placed into small teams (3-5 students each) and are required to identify, complete and report on a service learning project in the local community. These projects typically involve volunteering for a local charitable organization or small business. Team members are required to develop a set of objectives related to the service learning project and to develop and execute activities consistent with the objectives. Teams are given minimal supervision by the faculty teaching the course and are expected to manage their schedules and resources as individuals and collectively. The project provides an opportunity for students to realize the importance of teamwork and to self-evaluate their roles as leaders and members of a team.

In addition to the teambuilding exercises and assignments, SB 301 builds on the skills introduced in SB 201 by requiring a new set of self-marketing documents. Resumes, personal biographies, and business correspondence completed in SB 301 become the basis for assessing the growth and development of the student’s ability to effectively communicate his/her value based on a review of the portfolio of documents developed in SB 201.

SB 301’s course competencies and measurable outcomes are as follows:

- Understand the importance of networking for career success
- Understand the importance and impact of teamwork in today’s business environment
- Understand the elements of a team and the strategies for team development
- Establish goals through identifying values and ethical influences
- Practice better interpersonal communication skills
- Understand the importance of ethical conduct in business settings
- Understand the importance of mentoring relationships

- Plan and participate in a service learning project

The last of the classroom based courses, SB 401, moves beyond developing *teamwork* skills to developing *leadership* skills. In this course, each student is required to act as a group leader in completing at least one of the team-based course assignments. Each member of the team serves as a team leader for an assignment and receives a grade based on the team's assessment of that person's performance in completing the assignment. Students are thereby exposed to the pressures and the consequences of having leadership responsibilities. Course materials and lectures provide the basis for reflecting on the technical and theoretical aspects of leadership and leadership studies. Each student in the class is also required to identify a mentor in the local community. This person must be in a position of leadership in their respective organizations. The mentor's role is to advise the student as to the appropriate way to execute leadership functions and to provide insight on their own leadership triumphs and failures.

SB 401 students are also given opportunity to develop their leadership skills through interaction with the ESS executives. SB 401 students serve as hosts, platform presenters and student escorts for the ESS speakers visiting the campus. SB 401 also offers a final opportunity for students to refine their personal portfolios and to access the Career Center for feedback on interviewing and self-presentation technique. Students are also required to search for potential graduate schools and to identify an optimal choice should they consider pursuing an advanced degree.

SB 401 has the following as its core competencies and measurable outcomes:

- Define the characteristics of an effective leader and determine personal leadership attributes.
- Understand strategies designed to develop leadership skills
- Define the role of leader as communicator, especially in persuading, influencing, and negotiating with others
- Understand how to lead and implement organizational change
- Understand the key to organizational management
- Understand the leader's role in the strategic planning process
- Understand roles and responsibilities of a supervisor as leader, including diversity management
- Understand the role of ethics in corporate policies and practices
- Develop a mentoring relationship with a business person in their chosen area

The final course in the sequence, SB 400, is not a traditional classroom based course. The course is intended to require every student to gain exposure to the world outside of the University community by participating in an experiential learning experience. In this course, students are required to work outside of the classroom in a part-time employment capacity or as a volunteer for a minimum of forty hours during the course of the semester. Students are encouraged to identify experiential learning opportunities that relate to their course of study. The students are then required to develop a set of written goals and objectives for participating in the experience and to specify how the experience will add value to their educational experience relative to their specific major. An important requirement of participation in the course is that the student must be supervised by a regular employee of the organization. The supervisor evaluates the student worker on a form provided by the LAPD faculty. This evaluation becomes part of the overall grade the student receives in the course.

As a final assignment for the course, the student must also write an essay that addresses how the experience met or failed to meet the objectives outlined at the beginning of the experience. The essay is also required to address specific issues related to other parts of the LAPD curriculum, such as the importance of teamwork, in the particular work environment experienced by the student.

The goal of the experiential learning requirement is to allow all students the opportunity to put into practice some of the classroom-based, conceptual learning experienced in the other LAPD courses. Students who have participated in SB 400 are often able to relate their experiences to the content of the other LAPD classes as well as to other coursework throughout the curriculum.

## LAPD PROGRAM LOGISTICAL REQUIREMENTS

The LAPD program has several logistical requirements that are important to note as part of a full program description. Because the goal of the curriculum is to be integrated and reinforcing, a great deal of coordination and cooperation is needed among the faculty assigned to teach the SB courses. LAPD faculty meet at the beginning of each semester and several times during the course of the semester to discuss and share comments and feedback on the course materials, exercises and related activities. At SCSU, one of these faculty has been designated as coordinator of the program and is responsible for organizing these meetings and executing the policies and practices that ensue.

In addition to curriculum matters, the Executive Speaker Series requires a great deal of attention from the coordinator and support staff. The weekly visits by executives require initial contact from the coordinator and invitation by the Dean of the College. Arrangements must be made for escorting the visitors once they arrive on campus and for organizing the meetings and luncheons with students and faculty. Also, each visit requires that a specific program be produced with a biography of the speaker and information about their organization.

Students attending the ESS program are required to complete a survey at the end of the speaker's presentation which evaluates the presentation and summarizes major issues presented relative to their specific course objectives. These evaluations are collected and summarized by the LAPD Coordinator and form an important source of data about the effectiveness of the ESS.

The experiential learning and service learning requirements require faculty input and guidance. Each experience requires prior approval by the faculty. The faculty are also often involved in answering questions from members of the local community who have been approached by LAPD students. Students and their supervisors must sign a contract that specifies the students' and employer's rights and responsibilities. These documents are kept on file by the individual course instructors and the Coordinator.

Finally, the Coordinator serves as the intermediary between the LAPD program and the Career Center. The Coordinator interacts with the Career Center director and staff in identifying opportunities for student internship and experiential learning placement and in providing opportunities for real and mock interview sessions for LAPD students.

## CONCLUSIONS

The LAPD program has had a significant impact on the overall business curriculum and educational development of students since its inception almost ten years ago. The curriculum has evolved to become more integrative and self-reinforcing. New methods and models of teaching business soft skills are constantly being reviewed and implemented. The emphasis on developing student portfolios has provided students with significant resources with which to approach the job market. Students are prepared with a resume, personal statement and letters of interest (among other documents) that have been critiqued and refined over the course of at least three school semesters. They have had numerous opportunities to make professional presentations and to refine their interviewing skills through classroom presentations and mock and actual job interviews. Students have also contributed to the local community and have "learned by doing" through their service learning and experiential learning activities.

Since the program's inception, the business program has hosted dozens of top level executives representing a wide variety of business and governmental institutions from across the US and around the world. As a result of these contacts and interaction with the executives, a number of students have received internship and permanent job placement offers.

The discipline and ability to conform to dress and behavior codes has resulted in a positive reputation and impression of business students across the campus. In a recent presentation, the University Business and Industry Cluster, an advisory group of business executives committed to improving the employment opportunities for students at SCSU, noted that business students exemplify the professional demeanor and decorum sought by corporate recruiters. The Cluster has recommended that the LAPD be emulated across the campus in order to strengthen the ability of students in all major to compete successfully in the job market.

Following the “continuous philosophy” of AACSB International, the program is in the process of introducing further enhancements. For example, new syllabi are currently being developed that will streamline and coordinate the curriculums of SB 201, SB 301 and SB 401. In junior and senior years (SB 301 and SB 401) the developmental concepts that were introduced during SB 201 will be more rigorous and students will be expected to get more involved with group dynamics and self improvement.

Consistent with AACSB accreditation requirements, the Business Program is also currently engaged in an assessment process to measure achievements of learning objectives for all business courses. The Program has developed a formal Assurance of Learning (AOL) process that measures student learning across a number of program learning goals and objectives. Data from the Assurance of Learning assessments have indicated that learning goals related to leadership skills have met or exceeded pre-determined benchmarks for each of the last three years.

An assessment process is also being developed to measure the impact of Executive Speaker Series. Currently, the students evaluate each speaker after the presentations. However, the impact of the series is not evaluated at the end of the semester. This kind of assessment will help refine the process for selecting the topics and appropriate type of speakers to address those topics.

Data from the AOL process will drive future efforts to continually improve the development of the skills associated with the respective professional development courses.

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# Manuscript Guidelines, Submission and Review Process

## TOPIC AREAS (BUT NOT LIMITED TO THESE):

- Course design – current courses, new courses, new trends in course topics
- Course management – successful policies for attendance, homework, academic honesty ...
- Class material
  - Description and use of new cases or material
  - Lecture notes, particularly new and emerging topics not covered effectively in textbooks
  - Innovative class activities and action-learning – games, active learning, problem based
- Major or emphasis area program design that is new or innovative.
- Assessment – all aspects including AACSB and university level assessment strategies and programs
- Integration of programs or courses with other academic disciplines
- Internship programs
- Business partnerships
- Successful student job placement strategies
- Any topic that relates to higher education business education.

## SUBMISSION AND REVIEW PROCESS:

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- Manuscripts submitted for publication should be original contributions and should not be under consideration with another journal.
- Authors submitting a manuscript for publication warrant that the work is not an infringement of any existing copyright, infringement of proprietary right, invasion of privacy, or libel and will indemnify, defend, and hold Elm Street Press harmless from any damages, expenses, and costs against any breach of such warranty.

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- See the Style Guideline page for specific instructions.
- Articles must make a contribution to business education innovation.
- Manuscripts should be limited to 8 to 10 pages or less, although longer will be accepted if warranted.
- Articles can be either regular research papers, or shorter notes that succinctly describe innovative classroom teaching methods or activities.
- Manuscripts should be completely finished documents ready for publication if accepted.
- Manuscripts must be in standard acceptable English grammatical construction.
- Manuscripts should be in MS Office Word format. Word 2007 files are acceptable, as are earlier versions of Word. If you are using a new version of Word after Word 2007, save in Word 2007 format.

### Submit your manuscript

- Manuscripts may not have been published previously or be under review with another journal.
- Submit the manuscript attached to an email to **submit@beijournal.com**
- We will respond that we have received the manuscript.
- Article submissions can be made at any time.
- Submission deadlines: September 15 for December issue, March 15 for June issue.



### **Manuscript review**

- The editor and reviewers will review your submission to determine if 1) the content makes a contribution to innovative business education, 2) is of the proper page length, 3) is written in proper grammatical English, and 4) is formatted ready for publication.
- Submissions not meeting any of these standards will be returned. You are invited to make revisions and resubmit.
- If the submission meets the standards, the manuscript will be sent to two reviewers who will read, evaluate and comment on your submission.
- The editor will evaluate the reviews and make the final decision. There are 3 possible outcomes:
  - Accept as is.
  - Accept with minor revisions.
  - Not accepted.
- Reviews will be returned promptly. Our commitment is to have a decision to you in less than two months.
- If your paper is not accepted, the evaluation may contain comments from reviewers. You are invited to rewrite and submit again.

### **If your paper is accepted**

- Minor revision suggestions will be transmitted back to you.
- Revise and send back as quickly as possible to meet printer deadlines.
- Upon final acceptance, we will bill you publication fees. See [www.beijournal.com](http://www.beijournal.com) for latest per page fees. Sole author fees are discounted.
- The fees include all costs of mailing a copy of the issue to each author via standard postal ground.
- Delivery to locations outside the continental US will cost an additional \$10 per author for 5 day delivery.
- Faster delivery methods are available for US and international delivery. Contact the editor for a specific pricing.
- All publication fees should be remitted within 10 business days of acceptance, if possible.
- If you decide not to publish your paper with BEI Journal after submitting payment, we will refund publication fees less \$200 to cover costs of review and processing.
- Cancellation cannot occur after the paper has been formatted into the final printer's file.

# Manuscript Style Guide and Example

An example is providing following these instructions.

This style guide represents new style guidelines in effect for future issues.

## General Setup:

- All fonts: Times New Roman. 10 point for text. Other sizes as noted below
- Margins: 1 inch on all sides of 8½x11 inch paper size.
- No headers or footers.
- Avoid footnotes unless absolutely necessary.
- Page numbering bottom centered.
- No section breaks in the paper.
- No color, including url's. Format to black. No color in tables or figures. Use shading if necessary.
- All pages must be portrait orientation. Tables and figures in landscape orientations should be reformatted into portrait orientation.
- All paragraphs should be justified left and right, single spaced, in 10 point Times font, no indent on first line, 1 line between each heading and paragraph.
- One line between each paragraph.

## Titles, Authors, and Headings:

- **Title centered 14 point bold.** One line between title and author's name.
- Authors: centered, 12 point. Name, affiliation, state, country.
- One line space to **ABSTRACT** (title 10 point, bold, all capitalized, aligned left; text of abstract 10 point, no bold)
- After **ABSTRACT**, one line space, then **Keywords**. Followed by one line space to first major heading.
- **HEADINGS, MAJOR**, 10 point, bold, all capitalized, aligned left.  
The specific headlines will be based on the content of the paper, but major sections should at a minimum include an abstract, keywords, introduction, conclusion, and references.
- **Sub-headings:** 10 point, bold, first letter capitalized, no line to following paragraph. Align left.
- *Third level headings: Italic*, 10 point, first letter capitalized, no line to following paragraph. Align left.
- **Keywords:** heading: 10 point, bold, first letter capitalized, no line to following paragraph. Align left.  
Your list of keywords in 10 point, no bold.

## Tables, Figures and Graphs:

- All fonts 10 point.
- Numbered consecutively within each category. Table 1, Figure 1 etc.
- Title: 10 point, bold, left justify title, one space, then the table, figure, etc.
- Example: **Table 1: Statistical Analysis**

## References:

- APA format when citing in the text. For example (Smith, 2009).
- References section: 8 point font, first line left margin, continuation lines 0.25 inch indent. Justify left and right. No line spacing between references. List alphabetically by first author.
- Specific references: Last name, First initial, middle initial (and additional authors same style) (year of publication in parentheses). Title of article. *Journal or source in italics*. Volume and issue, page number range.
- Example: Clon, E. and Johanson, E. (2006). Sloppy Writing and Performance in Principles of Economics. *Educational Economics*. V. 14, No. 2, pp 211-233.
- For books: last name, first initial, middle initial (and additional authors same style) (year of publication in parentheses). *Title of book in italics*. Publisher information.
- Example: Houghton, P.M, and Houghton, T.J. (2009). *APA: The Easy Way!* Flint, MI: Baker College.

*Example (note that this example represents a change from previous style guides, including this issue )*

## **Evidence to Support Sloppy Writing Leads to Sloppy Thinking**

(14 point bold)

Peter J. Billington, Colorado State University - Pueblo, Colorado, USA (12 point)

Terri Dactil, High Plains University, Alberta, Canada

### **ABSTRACT (10 point, bold, all capitalized, left justified)**

(text: 10 point Times font, no indent, justified, single space, 150 words maximum for the abstract)

The classic phrase “sloppy writing leads to sloppy thinking” has been used by many to make writers develop structured and clear writing. However, although many people do believe this phrase, no one has yet been able to prove that, in fact, sloppy writing leads to sloppy thinking. In this paper, we study the causal relationship between sloppy writing and sloppy thinking.

**Keywords:** sloppy writing, sloppy thinking (10 point, bold title, first letter capitalized, left justified).

### **INTRODUCTION (10 point, bold, all capitalized, left justified).**

The classic phrase “sloppy writing leads to sloppy thinking” has been used by many to make writers develop structured and clear writing. However, since many people do believe this phrase, no one has yet been able to prove that in fact, sloppy writing leads to sloppy thinking. Is it possible that sloppy writing is done, even with good thinking. Or perhaps excellent writing is developed, even with sloppy thinking.

In this paper, we study the writing of 200 students that attempts to test the theory that sloppy writing leads to sloppy thinking.

### **PREVIOUS RESEARCH**

The original phrase came into wide use around 2005 (Clon, 2006), who observed sloppy writing in economics classes. Sloppy writing was observed in other economics classes (Druden and Ellias, 2003).

### **RESEARCH DESIGN**

Two hundred students in two business statistics sections during one semester were given assignments to write reports on statistical sampling results. The papers were graded on a “sloppiness” factor using...

**Data Collection** (Sub-heading, bold but not all caps, 10 point, aligned left, bold, no line after to paragraph)

The two hundred students were asked to write 2 short papers during the semester...

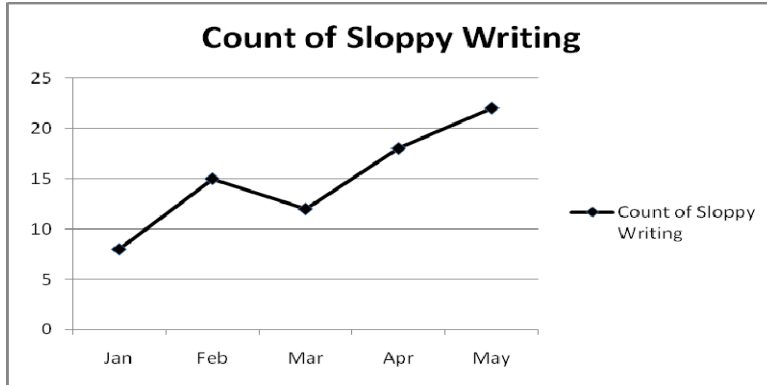
**Data Analysis**(Sub-heading, bold but not all caps, 10 point, aligned left, bold, no line after to paragraph)

The two hundred students were asked to write 2 short papers during the semester...

### **DISCUSSION**

The resulting statistical analysis shows a significant correlation between sloppy writing and sloppy thinking. As noted below in Figure 1, the amount of sloppy writing increases over the course of the spring semester.

**Figure 1: Sloppy Writing During the Semester**



The count results were compiled and shown in Table 1 below.

**Table 1: Counts of Good and Sloppy Writing and Thinking (bold, 1 line after to table, left justify)**

	<b>Good Thinking</b>	<b>Sloppy Thinking</b>
<b>Good Writing</b>	5	22
<b>Sloppy Writing</b>	21	36

\*-Indicates significance at the 5% level)

As Table 1 shows conclusively, there is not much good writing nor good thinking going on.

## CONCLUSIONS

The statistical analysis shows that there is a strong relation between sloppy writing and sloppy thinking, however, it is not clear which causes the other...

Future research will try to determine causality.

## REFERENCES (title 10 point, all caps, bold, align left, one line to first reference)

**(1 line spacing)** (All references 8 point, indent second line 0.25 inch, justify left and right)

- Clon, E. (2006). Sloppy Writing and Performance in Principles of Economics. *Educational Economics*. V. 14, No. 2, pp 211-233.  
 Devad, S. and Flotz, J. Evaluation of Factors Influencing Student Class Writing and Performance. *American Journal of Farming Economics*. V. 78, Issue 3, pp 499-502.  
 Druden, G. and Ellias, L. (1995). *Principles of Economics*. New York: Irwin.

(short bio section optional, can run longer than these examples; removed before sent to reviewers)

**Peter J. Billington**, Ph.D., is a professor of operations management at Colorado State University – Pueblo. His research interests span from lean six sigma to innovative education.

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