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THE COLLAPSE OF A NONPROFIT ORGANIZATION: WITHOUT WALLS INTERNATIONAL CHURCH

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CASE DESCRIPTION

The case discusses the circumstances that may have contributed to the fall of one of the largest mega church in the country. The case provides students with the opportunity to use data analysis and critical thinking skills and is more appropriate at the senior or graduate level. It can be used in various accounting courses including government and nonprofit accounting, the nonprofit portion of the advanced accounting class, and as one of several cases in an advanced auditing class. The case is designed to be taught in one class hour and is expected to require approximately two hours of outside preparation by students. The events described in this case are based on a real world situation as reported in various newspaper sources. However, while the names of the organizations and principal individuals are real, the identities of other individuals involved are disguised.

CASE SYNOPSIS

$29 million! This was the mortgage debt load of Without Walls International Church, one of the fastest growing megachurches in the country. At its apex, the church had a membership of approximately 22,000 spread across its two campuses. Unable to service its debt, the church was forced into bankruptcy by creditors which resulted in the sale of its prized locations and a downsizing and re-launch of the organization.

The case discusses some of the factors that might have contributed to the church's 'fall from grace'. These include an untimely expansion of church facilities, the lavish lifestyle of the pastor and family members, the failing health of the pastor and his daughter, a divorce, and a US Senate investigation of the church's finances.

The case demonstrates the challenges faced by nonprofit organizations to meet financial obligations at a time of declining contributions. The case also illustrates the importance of separating personal and professional interests and in creating effective corporate governance practices to ensure that the organization's mission and objectives are achieved.

INTRODUCTION

$29 million!! This number echoed through the sanctuary as members grappled with the mortgage loan balance owed by their beloved church to its lender. It was also the reason for the current meeting as the group pondered the impending bankruptcy filing and the future of Without Walls International Church or WWIC. How could this happen to WWIC? After all, it once boasted approximately 22,000 members and was among the fastest growing congregation in the country.

There were so many questions on the members' minds. The most urgent ones - how could this happen to us? Where were the checks and balances? Did we place our trust in the wrong individuals? Only divine intervention would save the church, and with the pending bankruptcy, that time had passed.

So what happened at WWIC? Did they ignore the many warning signs? For instance, the electricity at one of the church location was disconnected due to nonpayment twice in a short period of time. Also, confluence of issues including a divorce, the jet setting lifestyle of the leaders, the minister's addiction to prescription drugs, and the federal government's inquiry into the church finances, all had an impact on WWIC. Let's open the veil to learn more about the challenges faced by WWIC during its existence.

THE ORGANIZATION

South Tampa Christian Center was formed in 1991 by Randy White and his wife Paula, with only five members. While his dream to preach the gospel was now realized, the financial support was minimal and so the church struggled financially. In fact, it was unable to pay the minister a salary for the first two years and so he lived on government assistance and other support. For the first seven years, the church changed its location three times before it secured a location in the west shore area of Tampa, Florida. This was seen as a new beginning and the church changed its name to Without Walls International Church (WWIC). Before building its sanctuary, church services were held in an outdoor tent with 5,000 attendees per week and an additional 10,000 ministered to through 230 outreach programs.

WWIC expanded to Lakeland, Florida in 2002 by first renting the property used by Carpenter Home Church, a former mega-church. This facility was purchased outright in 2005 for $8 million, and renamed Without Wall Central. This was a major expansion for WWIC and an integral part of its future growth since this new location would allow it to accommodate an additional 9,600 people in the main auditorium.

WWIC included two additional entities – KABB Enterprises and Sprit Led; however, very little information is available for these entities. KABB was a Florida LLC organized for 'any and all lawful businesses', per its articles of organization. Spirit Led was also a LLC, but it was organized in the State of Delaware.

Paula White Ministries (PWM), the media ministry, was established in 2001. Its primary goal was to transform lives, heal hearts, and win souls worldwide. It received financial support through partnerships with worldwide viewers and from sales of ministry related products through television, direct mail, website, and speaking engagements.

The organization structure of WWIC is depicted below:

Organization Chart
Related Entities

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                    ┌─────────────────────────┐
                    │  Without Walls International │
                    │  Church, Inc. and Affiliates │
                    └─────────────────────────┘
                                 │
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 │  Without Walls  │   │  Without Walls  │   │   Paula White   │
 │International Church│  │     Central     │   │   Ministries    │
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│ Spirit Led│ │KABB Enterprises│
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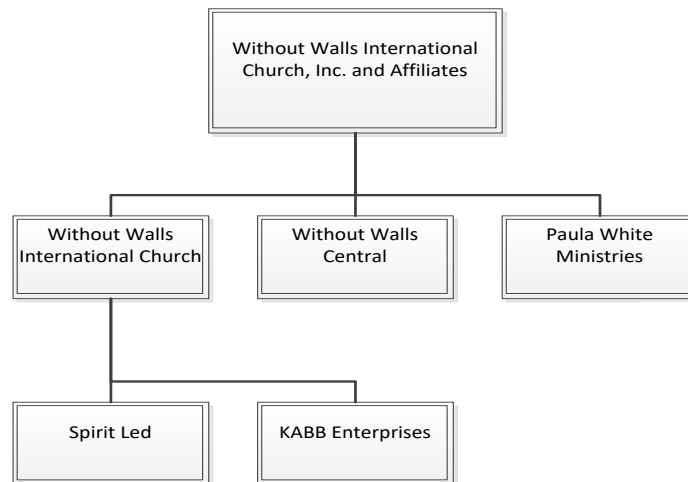
Governance

WWIC was led by an 18 member board which determined the salaries, pension plan, and housing allowances for the ministry. Board members include the pastor, his wife, a son, and two close associates. However, while the organization conducted regular board meetings, (mostly virtual meeting via phone conference); all decisions were made by the Whites and the chief executive officers, including financial decision and selection of board members. The board did not appear to have formal committees such as compensation or audit, to oversee operations. Communication with the board occurred after decisions were made regarding the operations of the organization. This was inconsistent the articles of incorporations which noted that the Whites would co-manage the operations with the board members.

WWIC grew to be one of the top five largest church organizations in America. During its expansion into Lakeland, Florida, Pastor White served as the Chairmen of the Board, President, CEO and senior pastor, while his wife served as Vice President, Secretary, reverend, and pastor until 2008 (when WWC face foreclosure for the first time). From 2004 to 2008, the Chief Financial Officer roles was occupied by three individuals Zach Caramel, George Raspberry (who resigned in 2008 due to the limited involvement of the board in church operations), and Nora Cranberry (unlike other executive officers she was included in the Whites decision making). All employees were required to sign confidential agreements preventing them from discussing anything relating to the organization.

The Whites and by extension WWIC practiced conversion teaching or "prosperity gospel. This is the belief that God's blessings are often tied to material blessing. Former church members noted that WWIC placed too much emphasis on money such as multiple tithes and offering collections in services.

Financial Information

As a religious organization, WWIC's revenue is derived from members' contribution. The most recent audited financial statements (as of December 31, 2006) showed total revenue received of $39.9 million in 2006, 90% of which was from tithes and offerings. The revenue represented an approximate 42% increase from the prior year. Total expenses were $35 million and $28 million for the years 2006 and 2005 respectively. As expected, most of the revenue was used to support the various programs and the category "Churches, Church growth, and Evangelism" received the largest share. WWIC reported unrestricted cash of $8.2 million at the end of 2006, and total assets and liabilities of $39.2 million and $29.7 million respectively. Excerpts from the audited financial statement are provided as Appendix A.

Compensation and Other Expenses

Religious leaders' compensation often includes salaries and additional benefits such as housing and vehicle allowance, and other benefits. The most recent audited financial statement of WWIC reported management and general expenses of approximately $5.3 million. The pastor and his wife were reportedly paid approximately $5 million in total compensation per the Senate report (discussed later).

The couple received housing allowance of $713,779 and $803,120 in 2005 and 2006 respectively. They owned an 8,072 square feet home in Tampa's Bayshore area. The home was purchased in 2002 and approximately $2 million was borrowed to finance the acquisition. The property renovation included an in-ground concrete pool and a spa. The home had a market value of $2.7 million in 2008. The couple also purchased a $3.5 million condo in Manhattan's Trump Tower. This property was partially acquired with a $2.6 million loan.

The vehicle allowance benefit was not disclosed but the pastor owned a late model Mercedes-Benz and a 2007 Bentley convertible. Family members played various unidentified riles in the organization. The wife's son, and the pastor's son, daughter, and father, were on the organization's payroll. They received total compensation of $420,000, $560,000, $700,000, and $1,075,000, for the years 2004-2007. After the couple's divorced, the pastor's girlfriend and his parents were added to the payroll and received undisclosed retroactive back pay.

The ministry owned a 1969 Grumman Gulfstream I aircraft which was purchased for $1.2 million in 2006. The jet was leased to other individuals when not in used by WWIC. The minister and his wife occasionally chartered jets for personal use and charged them to the ministry. One such trip involved at least three former professional athletes who traveled with couple to Las Vegas to watch a boxing match, The tickets to the event costs alone cost between $17,000-$18,000. The trip's costs were paid for using the WWIC's credit cards.

The organization's credit card and checking account were used to pay for personal items such as gas, meals, and clothing. There was no evidence of any reimbursement made to the organization. Such expenses included charges that were initially paid by the Reverend's two travel companions or "bodyguards". They would then request reimbursement from WWIC. As long as there were receipts, WWIC paid for reimbursement of the expenses. Others expenses paid by WWIC included the pastor's $24,000 credit card bill of which $11,000 was for personal items; and as the plastic surgery expenses for one of the church's pastors

CHURCH OPERATIONS

In 2004, WWIC reported a congregation size of 20,000, which made the church the seventh largest in the United States. WWIC began to expand its operations by buying property in central Florida for $8 million in 2005, renaming the facility Without Walls Central or WWC. However, WWIC struggled to attract a large congregation to its facilities.

2007 was a pivotal year for the organization and perhaps marked the beginning of its decline. It started simple enough when the pastor and his wife agreed on a divorce. Rev White became WWIC's senior pastor while his wife departed to focus on her flourishing televangelist and book career. However, WWIC experienced a decline in church membership and contributions since approximately 50% of the congregation left the ministry.

This same year, the IRS began investigating the church (specifically PWM) for misuse of funds and tax-exempt status. This was followed by a Senate investigation for possible misuse of its nonprofit status especially as it related to executive compensation, real and personal assets, and other general expenses paid or received since 2004. The investigation led to a schism within the organization with staff members complaining to the media of the couple's focus on money and fame, which led to more members leaving the organization.

Things turned even more personal for the minister as his eldest daughter was diagnosed with brain cancer in 2007 and succumbed to the disease in 2008. The death of a child can have a profound impact on a parent and the minister was no different – he spiraled into depression. The news of his best friend going to prison for life, and that one his children was molested by a staff member, might have been contributing factors. He even stopped preaching and became addicted to pain medication. In 2009, he took a leave of absence from WWIC citing stress-related health problems. His son and stepson managed the ministry while his ex-wife Paula stepped in as WWIC's senior pastor.

In 2008, the organization defaulted on a $1 million loan due to its creditor, Evangelical Christian Credit Union or ECCU, which prompted the credit union to file foreclosure proceedings. Subsequent to this action he parties were able to reach a loan modification. The organization responded by announcing that both its WWC location and its original Tampa sanctuaries were on the market.

2011 started on a high note for WWIC when in January 2011, the US Senate resolved its three-year investigation with no penalties or evidence of wrongdoing. (The IRS investigation was also resolved without penalties) However, the report released by the investigating senator noted that WWIC provided incomplete responses throughout the investigation citing constitutional protections and concerns about confidentiality. Instead, the investigation relied on public records and information provided by third parties.

2011 quickly spiraled out of control and might be considered the lowest point in the pastor's life. In May 2011, he was arrested in downtown Tampa on possible DUI charges with a blood alcohol level of 0.09 (versus 0.08 state allowable limit). He was able to avoid persecution once the charge was reduced to reckless driving, and he spent approximately two months in a California rehabilitation center. He returned to a dwindled congregation of approximately 200 in 2012 with renewed energy and goals. He assumed the role of senior pastor while Paula left to become the succeeding pastor at another congregation. Among his goals was the addition of a new commercial kitchen to serve the poor, the creation of an after school program fro at risk youth, and the housing of various programs such as an AA support group.

In August 2011, WWIC vacated the WWC location after the electricity was disconnected due to nonpayment, the second time in two years. The location had experienced declining

membership that was partially attributed to the continuous resignation of its various pastors. The church owed more than $35,000 in code enforcement fines in addition to the $13.5 million loan on the property (which includes two buildings on 80 acres).

Over the years, WWIC obtained four loans — worth $29 million — from ECCU for both its Tampa campus and a Lakeland church. When the church stopped making payments on the loan, the credit union began foreclosure proceedings on the two properties in October 2012. With no options available, WWIC filed for Chapter 11 bankruptcy protection in March 2014 listing assets and liabilities of $10 million and $50 million respectively.

DISCLAIMER

This critical incident was prepared by the authors and is intended to be used for class discussion rather than determining either effective or ineffective handling of the situation. The events described in this case are based on a real-world situation as reported in various newspaper sources. Some action is fictionalized.

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Appendix A: Withour Walls International Church

Consolidated Statements of Financial Position

December 31, 2006 and 2005

Assets		2006	2005
Cash	$	8,207,711	2,451,336
Restricted cash (notes 4 and 5)		365,000	365,000
Inventory		466,980	566,306
Prepaid expenses and other assets (note 3)		1,734,931	1,208,450
Property and equipment, net (notes 2, 5 and 6)		28,530,160	26,971,927
	$	39,304,782	31,563,019

Liabilities and Net Assets

Liabilities:			
Accounts payable	$	764,123	814,217
Accrued expenses		1,745,924	994,225
Short-term note payable (notes 4 and 5)		845,000	593,884
Capital lease obligations (note 6)		23,586	1,559,813
Long-term debt (note 5)		26,291,899	22,507,150
Total liabilities		29,670,532	26,469,289
Net assets (note 13)		9,634,250	5,093,730
Commitments, contingencies, and related party transactions (notes 6, 7, 8 and 11)			
	$	39,304,782	31,563,019

See accompanying notes to combined financial statements.

Consolidated Statements of Activities

Years ended December 31, 2006 and 2005

	2006	2005
Support and Revenue:		
Tithes and offerings	$ 35,269,657	23,041,787
Product sales, net of cost of goods sold of $2,753,164		
and $1,234,487 in 2006 and 2005 respectively	2,795,943	2,772,247
Conference and event revenues	1,208,597	1,696,259
Other income	658,966	573,499
Total support and revenue	39,933,163	28,083,792
Expenses:		
Program Services:		
Churches, church growth, and evangelism	18,600,406	15,304,493
Missions and outreach	8,721,375	6,943,942
Conferences and events	1,377,253	1,676,828
Supporting Services:		
Management and general	5,270,113	2,904,866
Fundraising	1,297,672	1,171,688
Total expenses	35,266,819	28,001,817
Increase in net assets before other changes	4,666,344	81,975
Other Changes:		
Insurance proceeds, net (note 2)	-	612,531
Loss on disposal of vehicle	(20,101)	(832)
Loss on disposal of airplane engine (note 6)	-	(132,775)
Loss on forgiveness of debt	(105,723)	-
Increase in net assets	4,540,520	560,899
Net assets at beginning of year	5,093,730	4,532,831
Net assets at end of year, as restated in 2005 (note 13)	$ 9,634,250	5,093,730

See accompanying notes to combined financial statements.

Consolidated Statements of Cash Flows

Years ended December 31, 2006 and 2005

	2006	2005
Cash flows from operating activities:		
Increase in net assets	$ 4,540,520	560,899
Adjustments to reconcile increase in net assets		
to net cash provided by operating activities:		
Loss on disposal of vehicle	20,101	832
Loss on disposal of airplane engines	-	132,775
Gain on involuntary conversion of building, net of repairs	-	(612,531)
Depreciation and amortization of property and equipment	1,863,052	1,374,017
Amortization of loan costs	171,546	123,235
Decrease (increase) in inventory	99,326	(317,061)
Increase in prepaid expenses and other assets	(601,994)	(458,390)
Increase (decrease) in accounts payable	(50,094)	207,451
Increase (decrease) in accrued expenses	751,699	(3,150)
Net cash provided by operating activities	6,794,156	1,008,077
Cash flows from investing activities (note12):		
Proceeds from the sale of vehicle	-	19,000
Proceeds from involuntary conversion of building, net of repairs	-	987,631
Purchases of property and equipment	(3,390,653)	(2,148,713)
Net cash used in investing activities	(3,390,653)	(1,142,082)
Cash flows from financing activities (note 12):		
Net borrowings on short-term line of credit	251,116	263,858
Borrowings on long-term debt, net of decrease in restricted cash of $31,000 for 2005.	4,106,276	331,026
Principal payments on long-term debt	(449,119)	(340,536)
Principal payments on capital lease obligations	(1,555,401)	(278,659)
Net cash provided by (used in) financing activities	2,352,872	(24,311)
Net increase (decrease) in cash	5,756,375	(158,316)
Cash at beginning of year	2,451,336	2,609,652
Cash at end of year	$ 8,207,711	2,451,336

See accompanying notes to combined financial statements.

Consolidated Schedule of Functional Expenses

Year ended December 31, 2006
(with comparative totals for 2005)

	Program Services				Supporting Services			Total	
	Churches, Church Growth and Evangelism	Missions and Outreach	Conferences and Events	Total	Management and General	Fundraising	Total	2006	2005
Salaries $	2,175,231	1,581,382	29,947	3,786,560	1,681,572	80,391	1,761,963	5,548,523	5,184,364
Housing allowances	176,624	220,780	-	397,404	476,885	8,831	485,716	883,120	713,779
Employee benefits	136,730	82,867	2,072	221,669	188,522	4,143	192,665	414,334	281,720
Payroll taxes	69,220	41,952	1,049	112,221	95,440	2,098	97,538	209,759	184,001
Total salaries and related expenses	2,557,805	1,926,981	33,068	4,517,854	2,442,419	95,463	2,537,882	7,055,736	6,363,864
Advertising and print media	1,493,153	168,760	206,126	1,868,039	-	163,822	163,822	2,031,861	1,230,746
Airtime	7,754,425	141,290	-	7,895,715	-	861,603	861,603	8,757,318	6,536,426
Bank charges	251,297	-	-	251,297	232,928	18,369	251,297	502,594	259,320
Building expense	73,313	36,656	-	109,969	74,634	-	74,634	184,603	144,036
Conferences and events	-	-	1,138,059	1,138,059	-	59,898	59,898	1,197,957	845,711
Contractual and professional fees	1,295,707	120,449	-	1,416,156	492,907	33,173	526,080	1,942,236	1,642,156
Equipment expense	185,916	84,495	-	270,411	168,991	-	168,991	439,402	339,346
Gifts	-	294,161	-	294,161	-	-	-	294,161	219,548
Insurance	214,520	79,851	-	294,371	90,663	-	90,663	385,034	156,421
Interest and financing costs	835,718	327,733	-	1,163,451	474,672	-	474,672	1,638,123	1,283,658
Missions, outreach, and benevolence	-	3,157,870	-	3,157,870	-	-	-	3,157,870	2,819,437
Postage and shipping	148,936	186,170	-	335,106	37,234	-	37,234	372,340	280,137
Repairs and maintenance	295,966	179,832	-	475,798	201,339	-	201,339	677,137	635,794
Supplies	245,426	23,367	-	268,793	136,639	9,040	145,679	414,472	448,168
Travel and transportation	1,687,476	1,211,804	-	2,899,280	-	33,582	33,582	2,932,862	2,417,212
Utilities and telephone	398,616	298,962	-	697,578	302,423	-	302,423	1,000,001	722,259
Website	55,378	35,847	-	91,225	5,121	2,376	7,497	98,722	24,402
Miscellaneous	89,455	40,227	-	129,682	20,110	-	20,110	149,792	135,924
Total expenses before depreciation and amortization	17,583,107	8,314,455	1,377,253	27,274,815	4,680,080	1,277,326	5,957,406	33,232,221	26,504,565
Depreciation and amortization	1,017,299	406,920	-	1,424,219	590,033	20,346	610,379	2,034,598	1,497,252
Total expenses $	18,600,406	8,721,375	1,377,253	28,699,034	5,270,113	1,297,672	6,567,785	35,266,819	28,001,817

MARKETING MISSIONS – A CASE STUDY FOR THE SOCIAL MARKETING MIX

Andrea Finchum, West Texas A&M University

CASE DESCRIPTION

The primary subject matter of this case concerns marketing for Not-For-Profit (NFP) organizations. Secondary issues examined include social entrepreneurship, the social marketing mix, services marketing, entrepreneurship and effective leadership and management of NFP organizations. The case has a difficulty level of four, appropriate for senior level. This case is designed to be taught in two class hours and is expected to require two hours of outside preparation by students.

This case study applies undergraduate marketing concepts to the Not-For-Profit (NFP) organization. The marketing mix becomes more complicated when applied to a NFP organization as the traditional 4 P's morph into 8 P's for a nonprofit organization. The focus for this case study is the 4 extra P's of Publics, Partnership, Policy, and Purse Strings as these elements distinguish the NFP social marketing mix from the more traditional marketing mix leveraged by for-profit companies.

Students will be presented with background analysis for the Red Cross and Habitat for Humanity – two NFPs that have successfully expanded their mission from one individual's passion to a global operation. Students will then consider the cause of a much smaller organization – Snack Pak 4 Kids. Like the Red Cross and Habitat for Humanity, Snack Pak 4 Kids was organized by one man with a passion to serve a societal need. It is a small NFP, local to the Amarillo, Texas area, but desiring to expand its operations throughout Texas and beyond. Students will be asked to consider the Snack Pak 4 Kids social marketing mix best able to launch this small NFP to a national level.

CASE SYNOPSIS

We are teaching a millennial generation with a passion for service. NFP organizations are an important vehicle for public service, and there is no doubt that our students will become involved with NFPs in their lifetime. Therefore, we need to prepare them to effectively lead and participate in these groups. The Social Marketing Mix is a somewhat novel framework for NFP marketing that is largely unaddressed in the typical marketing curriculum. This case brings to students a topic area that they care deeply about and a toolkit to get them thinking about how they can contribute to their societal concerns in a practical way.

CASE BODY

"Real hunger feels like having your insides crushed all together..."
-- Amarillo middle school student

Dyron Howell is on a mission to end childhood hunger in the Texas panhandle. He's just an ordinary guy – a pharmaceutical sales representative from Amarillo, Texas – who realized five years ago, that there were children, provided with meals at school during the week, who were going hungry over the weekend. So, he did something about it and on September 2, 2010,

started sending sack lunches home on Fridays with 10 children from Will Rogers Elementary. Today, the Snack Pak 4 Kids organization sends snack packs home with more than 3,700 kids from about 50 schools in Amarillo and works with others who do the same for more than 6,000 students in 34 more school districts in the surrounding area (Beilue, 2015).

Obviously, the need is real, substantial, and reaches well beyond the Amarillo community. Howell's desire is that no child would be hungry on the weekend. His community and his conscience are pushing him to expand his operation. But how does he do that, making the best use of his time and talent to leverage the resources necessary to help the most children possible?

The prevalence of NFP organizations continues to grow. In 2007, nearly 1.6 million tax-exempt organizations (NFP or non-governmental organizations) operated in the United States, representing 8.11% of all wages and salaries paid and $2.6 trillion in total assets (National Center for Charitable Statistics, 2010). Thus, it is increasingly important for entrepreneurs to an understanding of the extra requirements related to marketing NFP services.

BACKGROUND

Not-For-Profit Organizations

The typical NFP begins with a single individual who has a passion for a societal cause that is recognized and relevant for a specific community. For the NFP to be sustainable as its operations expand, the NFP must create the infrastructure necessary to coordinate funding, communication, and provision to those in need without the continual presence of the NFP founder.

This is not so different from the sustainability requirements of the for-profit company, except that the NFP is not typically generating revenue and so must be concerned with several additional stakeholders. With respect to the NFP's marketing strategy, these additional requirements can be attended to by considering the social marketing P's of Publics, Partnership, Policy, and Purse Strings.

This case explores how two successful NFP organizations – The Red Cross and Habitat for Humanity – addressed the social marketing P's to allow for growth beyond the physical presence of the Social Entrepreneur and beyond the NFP's original geographic territory.

The case then provides background information on a NFP enterprise local to the Amarillo, Texas area – Snack Pak 4 Kids. You will be asked to consider the challenges for this NFP in growing its operation to a national level and to discuss the social marketing mix elements in relation to the Snack Pak 4 Kids mission.

The Social Entrepreneur

The Social Entrepreneur is that individual who recognizes a societal need and endeavors to address it to create lasting change to the benefit of a society or to a particular group in a society (Light, 2008). Very often, the social cause is concerned with a basic, human need related to provision of food, water, shelter, or safety (Certo & Miller, 2008).

The NFP entity is created for tax purposes and to establish the enterprise to receive donations and other funding. The Social Entrepreneur brings to the NFP the resourcefulness and creativity that comes with a desperate effort to provide relief for a dire situation. Add to that the

charismatic delivery of the call for help, and the Social Entrepreneur represents an engine for a cause that is difficult to replicate. (Dees, 1998).

Socio-Cultural Factors

Any marketing strategy exercise will include a conversation on the benefits to be delivered. While the consumer is purchasing a collection of product/service features, traditional marketing theory is that the consumer is persuaded to make the purchase based on the benefit(s) expected. As marketers, we are trained to identify and communicate these qualities – "the sizzle" – rather than the factual product features. As examples, marketers of Nike tennis shoes communicate how "*cool*" it is to have the same shoes that Michael Jordan wears; ADT markets the *feeling of safety* that parents will have with a home security system; Victoria's Secret capitalizes on women's *desire* to be sexy. The benefits of a NFP mission may be obvious as they tend to relate to basic human needs, but it is critical that the NFP understand that benefit realization is sensitive to local practices and cultures.

It is a recent notion that there exists for sustainable NFPs a link between the socio-cultural environment and the social marketing mix. The logic is that societal needs or issues are related to particular behaviors or socio-cultural qualities that apply to a defined group of people. For example, in Tanzania where childhood mortality due to malaria is prevalent, the societal value for a NFP cause to prevent malaria in children is likely to be high. Some of the behaviors and customs related to high childhood malaria in Tanzania include employment being unavailable near the home, rituals related to funerals and other ceremonies, and outdoor social activities. These behaviors are related to social determinants like social class, poverty, and racial inequality, which are specific to the Tanzanian community (Yamin, 2008 in Wasan & Tripathi, 2014). Thus, the NFP's efforts need to be specific to the behaviors and socio-cultural realities that are relevant for the population it intends to serve. The malaria prevention efforts in Tanzania will communicate the risks associated with the related cultural rituals and behaviors. And the population will likely be receptive to the NFP's efforts because of the very relevant local concern for malaria.

The Social Marketing Mix

The four components of the traditional marketing mix are Product, Price, Promotion, and Place. These elements of a marketing strategy are familiar and, thus, they will not be addressed here. Of special concern to the NFP are the 4 additional P's of the social marketing mix: Publics, Partnership, Policy, and Purse Strings.

Publics – Publics relates to the audiences of concern for the NFP, both external and internal. External Publics include the target populations, policymakers and gatekeeper organizations which may influence the NFP's success (e.g. the media). With respect to the NFP's target audience, the NFP very often identifies behaviors which are linked to the NFP concern and asks the target audience to change their behavior in some way. For example, the American Cancer Society works to persuade consumers in America – its target audience, and one of its external publics – to stop smoking. Internal Publics, on the other hand, are those groups involved with the operations, either with respect to approval or implementation. Internal Publics include staff and policymakers which allow for funding the NFP.

Partnership – NFPs often find it helpful to partner with other organizations to address a societal concern. The tactic for the NFP is to identify organizations with similar target audiences, even if they promote different agendas.

Policy – NFP's will often pursue policy change to support the behavioral changes they promote. NFPs may leverage media avenues to put pressure on legislative bodies, industries, and other groups to promote policy changes that support the NFP cause. They may also be involved with aggressive lobbying efforts to promote their cause. Legislative changes related to smoking in public places, for example, has effectively supported the American Cancer Society's effort to curtail America's smoking habits.

Purse Strings – Unlike for-profit companies, the NFP is typically not able to secure funding by generating sales revenue. Instead, the NFP must often secure governmental grants and/or foundational and private donations. Thus, the NFP must be very deliberate in securing funding in order to remain a sustainable enterprise, particularly as its operations expand geographically (Weinrich, 2011).

It is imperative for the NFP intending to expand its operations that some combination of these four elements become part of the NFP strategy. When the NFP can tap into relevant socio-cultural concerns in the growth areas to leverage Publics, Partnership, Policy, and Purse Strings, then the physical presence of the Social Entrepreneur is no longer mandatory. The Red Cross and Habitat for Humanity are two global NFPs that have done exactly this.

THE INTERNATIONAL COMMITTEE of the RED CROSS (ICRC)

The Red Cross was founded in 1863 in Geneva, Switzerland by Henri Dunant. Five years prior in 1858, Dunant had witnessed the slaughter of approximately 40,000 soldiers at the Battle of Solferino in Northern Italy between Austrian and French forces. Following the battle and with the help of peasant villagers, Dunant collected the wounded and organized a clinic for them in the church of a neighboring town called Castiglione. He then paid a visit to Napoleon III and convinced him to declare that the Austrian medical personnel and the Austrian soldiers being tended to in the Castiglione makeshift hospital would be released and allowed to return to Austria (Joyce, 1959).

Dunant's goal with the Red Cross was to put an end to warfare, his stated philosophy two-fold: "succour for the victims of war, and repudiation of war itself." (Max Huber, Executive President of the International Red Cross Committee in Joyce, 1959). Dunant knew from the outset that his mission would be an international effort, requiring the involvement of governments. Very early on, Dunant created a leadership team that didn't include himself. Thus, while he was the impetus to create the organization, he created an infrastructure for the organization that didn't require his presence.

The very first ICRC conference in 1863 was attended by delegates from fourteen countries, and support for the group grew very quickly. Only one year later, delegates from sixteen countries met again to adopt the first Geneva Convention, which delineated the rules for humane treatment of soldiers during wartime (Joyce, 1959).

The ICRC organization is now represented in every country and is sustained by millions of volunteer supporters. The organization's mission has stretched in the last century to cover non-wartime concerns as well, its stated mission today being "to alleviate human suffering, protect life and health, and uphold human dignity especially during armed conflicts and other emergencies" (The Movement, 2013). In 2014, the ICRC operations purport to have improved

access to shelter and water for more than 26 million people and provided aid including food and health care services to nearly 10 million people in countries including South Sudan, Somalia, Ukraine, and Myanmar (Annual Report 2014, 2015). At the local level, Red Cross groups also provide such services as CPR Training, lifeguarding instruction, and blood drives (Health and Safety Training and Education, n.d.).

The ICRC governing body in Geneva, Switzerland oversees and contributes to the efforts of each country's National Society (the Red Cross operation at the country level). While the Red Cross organization is very active in seeking private, corporate, and foundational donations, the bulk of its funding comes from government grants (Finances, n.d.).

The ICRC has made it a guiding principle to cooperate only, allowing the National Societies to develop their own operational plans, which are sensitive to the local behaviors and cultures (Cooperation with the National Societies, 2010). The ICRC has instituted an infrastructure that allows local people to communicate their needs and concerns, leveraging digital technology and social media tools. Similarly, the organization has built a culture of communication, seeking input and feedback from communities served to be sure proper attention has been given "to understand the culture and mores and to carefully consider local dynamics" (Empowering People and Communities, n.d.). This has proven to be a very successful strategy to ensure that each ICRC aid program is sensitive to the customs and cultural norms for the people being assisted.

HABITAT FOR HUMANITY

Millard and Linda Fuller founded Habitat for Humanity (HFHI) in 1976 in Americus, Georgia. HFHI provides homes to low-income families that would otherwise not qualify for home-ownership. They are a Christian-based NFP whose mission is: "Seeking to put God's love into action, Habitat for Humanity brings people together to build homes, communities and hope" (Habitat for Humanity, 2015).

Home-owners are offered interest-free mortgages and are required to participate in the building effort. They make a small down payment on the home and must make monthly mortgage payments to maintain ownership of the property. HFHI recognizes no profit on the home sales and uses the monthly mortgage payments to fund additional home building projects. The homes are constructed using volunteer labor and donated money and building materials (Smith, 2013). Since its inception, HFHI has constructed or renovated more than 800,000 homes, which makes it the largest NFP builder on the planet (Habitat for Humanity, 2015).

Fuller believed strongly that the provision of a safe and stable home was instrumental to reducing poverty in communities, one family at a time. He argued that owning a home meant that a family would be able to raise healthy children who would feel more secure, be more successful in school, and therefore, would be more likely to succeed in life. He believed also that owning a home brought with it a sense of pride and success that would foster further personal growth for homeowners, effectively leading them away from life habits that would otherwise serve to keep them mired in poverty (Reckford, 2011).

HFHI recognized relatively little success in its early years, funding only 342 homes in its first five years of operations. That changed dramatically when, in 1984, Millard Fuller approached former President Jimmy Carter to become a spokesperson for the NFP's mission. In the next two years, the organization's funding grew from $2.4 million to over $60 million, and funding as of 2013 had skyrocketed to $1.35 billion.

It was initially a guiding principle that HFHI would not accept government funding for several reasons. First, HFHI wanted to ensure the community involvement element of their mission was preserved and feared government funds would reduce the need for and the emphasis on this preserved. Also, since HFHI was a religious-based mission, Fuller was concerned that government involvement might threaten these underpinnings. Finally, Fuller simply didn't want to rely on the government, fearing it might not be a consistent and long-term resource. The opportunity for government funding proved too lucrative, though, and Fuller eventually reversed his stance on this position. However, he maintained that grant money could only be used for land purchases, infrastructure such as utilities and roads, and administrative costs, intending to preserve the volunteer and community involvement in the home constructions (Smith, 2013).

Since 1996, HFHI has made a significant shift from building single homes in the middle of existing neighborhoods to purchasing large tracts of land and constructing entire communities of homes. The intent was two-fold – to provide as many homes to as many people as possible, using resources as efficiently as possible, and to create more public awareness around the Habitat for Humanity mission. While the jury is still out on this strategic decision, HFHI has recognized considerable criticism in recent years with obvious deterioration and increasing crime becoming concerns for some HFHI communities. Some have argued that HFHI is effectively creating new slums and causing property values to decline for homeowners around the HFHI communities (Smith, 2013).

The HFHI enterprise is organized into five global area offices – for the United States and Canada, the Middle East and Africa, the Asia Pacific countries, the Latin American and the Caribbean countries, and Europe and Central Asia areas. In addition, country-level and community-level offices function in partnership with HFHI, but coordinate all aspects of each project at the local level with respect to fundraising, family selection and support, setting up the mortgage, and constructing the home. Fuller and his wife have not been involved with the governing of HFHI since 2005 when they were dismissed from the board of directors, Fuller being accused of inappropriate conduct and sexual harassment (Habitat for Humanity, 2015).

Throughout its operation and continuing today in Fuller's absence, one thing that hasn't changed is the centrality of community for the HFHI mission. It has been an unwavering tenant of the HFHI mission to involve the local community in the effort to help a family work their way out of poverty and to give people the opportunity to help their fellow man. HFHI has been very active in partnering with churches, veterans' groups, architectural and design firms and many, many other organizations to rally expertise and volunteers for its home construction projects. This same philosophy has extended to HFHI's international operations. Approximately 80% of people in the world don't hold title to their home or the land it sits on. It has often been a necessary first step, therefore, for HFHI to involve local governments to delineate property boundaries and to establish policies that will allow for and ensure home ownership. In addition, local communities are called upon to assist in providing access to safe water and healthy living conditions for the new homeowners (Reckford, 2011).

Both the ICRC and the HFHI have found sustainability in creating infrastructure that allows for provision of help at the local level, relating to the socio-cultural behaviors, cultures, and norms of local communities. Both have also successfully navigated their operations beyond the presence of their original founder. For these reasons, they offer insight to the Snack Pak 4 Kid program as it expands its operations.

SNACK PAK 4 KIDS

Weekend hunger for children in America is a significant need as evidenced by the more than 3,600 backpack food programs operating in this country, providing food on weekends to approximately 190,000 children (Beilue, 2015). Dyron Howell's Snack Pak 4 Kids (SP4K) program contributes in a significant way to this effort, providing hearty, nutritious weekend snacks to nearly 10,000 school-age children across the Texas panhandle and into Oklahoma.

At the core of the SP4K operation is the schools. Teachers or other school staff identify children in need and enroll them in the program. Snack Pak 4 Kids receives donations from many corporations, churches and civic groups, and 100% of all donations go to purchase food supplies for the children. Snacks provided for the children include healthy choices such as milk, peanut butter, trail mix, fruit cups, cereal and beef stew, mostly things students can prepare for themselves without adult supervision (Bernet, 2011). Thanks to the many volunteers wanting to be involved in the effort, 100% of all donated funds go to purchase food for the children. Teachers then play a critical role in the process by delivering the lunch bags to students on Friday afternoons (Snack Pak 4 Kids, n.d.).

Beyond alleviating weekend hunger, the SP4K program has generated the related benefit that students are doing better in school. Two-thirds of teachers surveyed in the last three years' report improved academic performance, which they attribute to the SP4K program. "If you eat over the weekend, you come back ready to learn," reports Howell. (Bernet, 2011).

As impressive as the SP4K program is, the need is greater, and Howell's ability to respond is being stretched. Even within the Amarillo area, it is estimated that the need has not yet been met, given that in Amarillo alone, nearly 65% of Amarillo students – approximately 21,000 kids – qualify for subsidized lunches (Beilue, 2015). Additionally, new schools continue to request to be included in the program, some beyond the Amarillo area; seven San Antonio schools now operate within the program (Bernet, 2011). Further, as children have graduated beyond elementary school, SP4K is being called on to provide the same weekend service to students in middle school and high school. SP4K has, therefore, started a service called "Snack Shaks" which is run online by students and supported by a growing number of churches and local corporations. Older children have bigger appetites and greater nutritional requirements, and so the need continues to grow. SP4K currently relies on a donated warehouse space to assemble the snack bags for the Amarillo area, but they need more room and more resources to coordinate the increasingly massive weekly effort (Beilue, 2015).

The Snack Pak 4 Kids program is at a crossroads. It has reached its capacity for operating as a volunteer organization. Howell is tired and recognizes that he needs support in the way of staffing and leadership to relieve some of the burden on him. Also, he can see now that the SP4K program is addressing only a symptom of larger societal problems relating to parenting and poverty. While his efforts are staving off weekend hunger for some, it is not addressing these larger issues. Howell is questioning his ability to effectively serve a larger body of hungry children with his current operational platform.

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A SYSTEMS ANALYSIS, DESIGN, AND DEVELOPMENT CASE STUDY: OPEN ARMS FOOD PANTRY CLIENT AND VOLUNTEER SYSTEM

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CASE DESCRIPTION

The primary purpose of this case study is for Systems Analysis and Design, Systems Development, and Database courses. Students examine realistic dialog and Interview Notes, as well as existing documents. For Systems Analysis and Design courses, the students should be able to follow this realistic case study of a non-profit organization and conduct the planning, analysis, and design phases of the System Development Life Cycle (SDLC), using either a traditional or object-oriented approach. Deliverables would include process and data diagrams and modeling, and user interface designs, and should require approximately 12-15 hours to complete, outside normal class time. In System Development courses, e.g., capstone courses for a computer information systems major, students can use this case study to not only analyze and design a solution, but actually develop the solution using various windows or web-based tools. The entire project should require approximately 20-25 hours to complete. For Database courses, this case could be used to illustrate database design techniques, resulting in the creation of appropriate data models and physical database designs. This should require approximately 10-12 hours to complete. The case study is of moderate difficulty – ranging from a three to five, and is designed for junior and senior level students, but could also be used for graduate courses.

CASE SYNOPSIS

Dr. Thomas Waggoner, an information systems professor at the local university, is working with a local food pantry when, in the course of a conversation, he determines that the pantry could greatly benefit by using a computerized system to track pantry clients as well as volunteers. He discusses the idea with the students in his Systems Analysis and Design class, as well as the students in his System Development class. He brings his classes to the pantry for a tour, and has them begin the project.

CASE BODY

"It looks like we are going to have a very good selection of food this weekend," Dr. Thomas Waggoner mentioned to his fellow volunteer, Leila, as they were shelving food at the Open Arms Food Pantry.

"I agree. We had several great donations this week, and we were able to get quite a bit of frozen meat and produce from the food bank," responded Leila. "How many families did we help last Saturday?"

"Over 100," replied Dr. Waggoner. "We are now serving between 350 and 400 families each month."

"That's great! How are we doing keeping up with all the paperwork?" asked Leila.

"Well, that is a challenge. We are doing the best we can, but since we have so many forms to keep up with, and everything is paper-based, it is taking a lot of time." Dr. Waggoner explained.

"Don't you teach computer information systems? How about having some of your students build a computer system for us? Couldn't that save us a lot of time?" asked Leila.

"You know, I was thinking about doing just that. The semester just started, and I am still thinking about a comprehensive project for both my Systems Analysis and Design class, as well as my senior System Development course. This would be a great project for both classes. I am going to start by writing up a description of what we do on a daily, weekly, and monthly basis, and also pulling together examples of all the forms we use."

Dr. Waggoner spent the next few days doing just this, and then presented the opportunity to his courses. The goal was for the SAD class to develop the process and data models, and design the user interfaces for the new system. They would need to complete these with about 6 weeks left in the semester, at which point the students in his System Development course would then take the designs and work to complete the system by the end of the semester. Dr. Waggoner would coordinate between the classes so that, for example, when the data models were completed, the development class could begin to create the database.

Dr. Waggoner arranged for his classes to meet at the food pantry during their regularly scheduled class time. He felt having the students "get a feel" for the environment was an important part to understanding the requirements for a new system. While at the pantry the students asked several questions about how the organization worked, when and where food came from, how food was ordered, how clients were processed, how they selected their food, what activities volunteers performed, and other related questions. While they were at the pantry, the students also had an opportunity to help shelve food from a recent large donation. From their questions and the previous process descriptions Dr. Waggoner had composed, the following interview notes were developed.

Open Arms Food Pantry
Description of Business Processes

Food Acquisition Process

Food is generally obtained two ways. The majority of the food available for the clients was purchased from the regional food bank. Orders for food were made through the food bank's online system once or twice a week, and deliveries were made to a central location where all the food pantries in the area would gather to pick up their orders. A couple of volunteers would meet the delivery truck and transfer the food to their pickup. The volunteers would then drive the food order to the pantry and unload. Occasionally one or more additional volunteers would be waiting to help unload and shelve the food. Refrigerated and frozen food was put away first, followed by other food staples.

The other way food was obtained was through donations. Regularly throughout the year, local churches, schools, and businesses hold food drives to benefit the pantry. When the drive is completed, the pantry would be contacted and the organization or pantry volunteers arrange for the food to be taken to the pantry and shelved.

After gaining an understanding of this process, it was decided this part of the organization did not require a computerized system, particularly as the pantry did not keep a perpetual inventory system of their available products, but it was something to be considered at a later time.

Client Intake Process

When a new client (a person in need of food pantry services) arrives at the pantry, they are required to complete a two-sided form, collecting various demographic information – name, address, family size, birthdate, family member names and birthdays, whether they qualify per USDA income guidelines for various types of foods, and what government support they are on. This generally takes about 5 minutes to complete. The form is then placed in a folder, sorted alphabetically.

Both new clients and existing clients will sign in on a form that asks for their name, number of people in their family, what services they are receiving (e.g., food), and their signature. These forms are collected and sorted by date, and the total number of families, household members, and new clients are calculated and written on the top of the form when the pantry closes for the day.

After clients sign in, a volunteer carries a shopping basket and walks around with them as they select food items. When the clients finish choosing their predetermined maximum number of food items, the volunteer carries their basket to a counter and places the food items in paper sacks or recycled shopping bags. Clients are allowed to select at least 10 grocery items, and depending on the size of their family, possibly up to 25 grocery items. A family of 1-2 can select up to 10 items, 3-4 can select up to 15 items, 5-6 can select up to 20 items, and a family with over 6 members can select up to 25 items. A volunteer will then help carry the sacks to the client's car.

Volunteers Process

The pantry is fortunate to have many volunteers who help either pick up food, shelve food, or staff the pantry when it is open. Volunteers are usually people from the community and/or local churches who simply would like to contribute their time to a worthy cause. When a volunteer arrives, if this is the first time they have volunteered at the pantry they will need to fill out a short form with basic demographic information. These forms are kept in a folder, sorted by last name. All volunteers sign in on a form with their name, and time they arrived. When the volunteers are finished working, they enter the time they leave on this form. Once a month the volunteer coordinator calculates the total time worked by all volunteers.

Monthly Reports

Each month the pantry is required to submit a short report to the regional food bank showing the total number of families served during the month, the total number of individuals served, and the number of new clients.

Dr. Waggoner explained to the students what the Pantry really needed was a database system which would track clients and volunteers, collecting all the information currently on the respective intake forms, and generate reports of the number of clients served by day and month, and the number of volunteer hours provided each day and month. As mentioned in the Description of Business Processes, the pantry currently did not use an inventory system, but he wanted his students to consider what that might look like as a future project. In the event that an inventory system is needed in the future, preliminary data and process models could be developed, and preliminary user interface designs could be created.

After reviewing the business processes with his students, Dr. Waggoner provided his students with the requirements shown below. His SAD students began developing data and process models and designing the user interfaces. As the semester progressed and the analysis and design phases were completed, Dr. Waggoner had his system development class use the specifications and start creating the working system. By the end of the semester the system was completed and implemented, and the recordkeeping and reporting at the pantry was greatly improved.

APPENDIX

Open Arms Food Pantry Layout

ENTRANCE

WAITING AREA

OFFICE

BREAD & CEREAL

CANNED FRUITS
AND VEGETABLES

COOKING STAPLES

CANNED MEAT

FROZEN
FOOD

FRESH PRODUCE

CHECKOUT

EXIT

BABY ITEMS

STORAGE

TRAINING AND
SEASONAL ITEMS
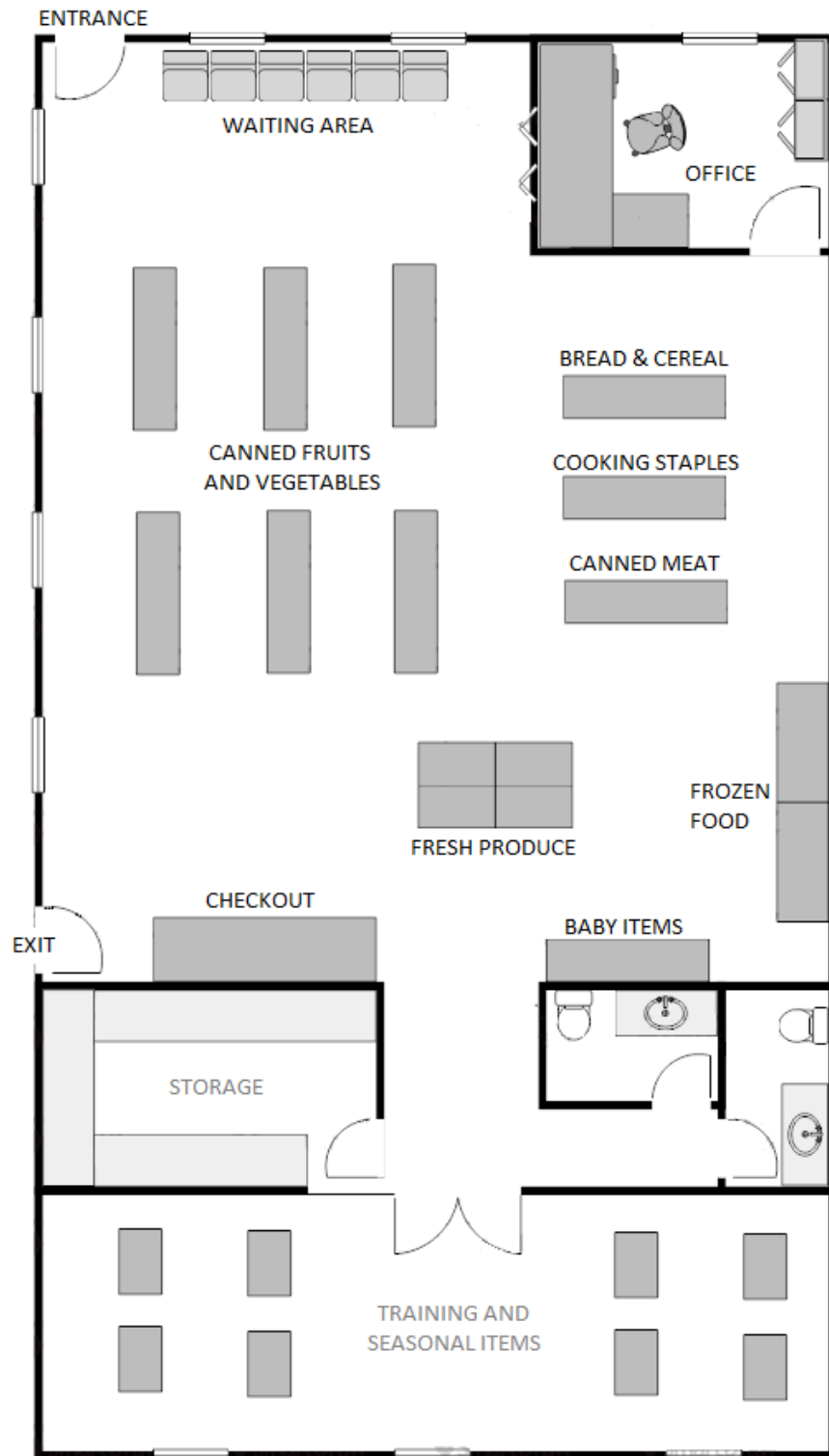
Client Intake Form (front)

OPEN ARMS FOOD BANK

CLIENT INTAKE FORM

Name: _____

Phone Number: cell or home (_____)_____   DL/ID #_____

Address: _____ County _____

City: _____ State: _____ Zip Code: _____

Date of Birth: _____

Number of People in Household: _____

Number of Children (under 18) in Household: _____

Names of *others* in Household	Date of Birth	Relationship to you
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

RELEASE OF INFORMATION

The Open Arms Food Pantry Client Intake system is a computerized record keeping system that maintains information about people in need of emergency services. My signature below indicates that I understand that all information gathered about me is personal and private, and that I do not have to participate in this program. I have been given the opportunity to ask questions about the program and to review the basic, identifying information. This Release of Information will remain in effect for 3 years and 90 days from the date noted under my signature at the bottom of this page unless I make a formal request to Open Arms Food Bank that I no longer wish to participate in the program.

_____   _____
Client Signature   **Date**

By signing I certify that all of the information listed on both sides of this form is true and correct.

- OVER -

1202 S. Main St. | Bell, TX 76543 | phone 254.555.OAFP | fax 254.555.7654
openarmsfoodbank.org

Client Intake Form (back)

CLIENT INTAKE FORM

PLEASE CIRCLE APPROPRIATE ANSWERS or ALL THAT APPLY

Gender		Education	
Male	Female	High School: Completed Incomplete	
		GED College	
Marital Status		**Employment**	
Single		Full Time	
Married		Part Time	
Partner		Unemployed	
Divorced		Disabled	
Widowed		Retired	
Ethnicity/Race		**Other**	
Hispanic/Latino		At Risk of Being Homeless	
American Indian or Alaska Native		Disabled	
Asian Black or African American		Homeless	
Pacific Islander or Native Hawaiian		None of the Above	
White or Caucasian		**Military**	
Other		Yes No	

Government Benefits

Receives SNAP (Food Stamps)	Receives Adult Medicaid
Receives Children's Medicaid/CHIP	Receives Medicaid for Elderly or Disabled
Receives Social Security	Receives TANF
Receives Veterans Benefits	Receives WIC
Receives Woman's Health Program	None

NOTICE TO CLIENTS

If you receive food from this emergency pantry, please note the following:

This emergency food pantry is a Partner Agency of the Central Area Food Bank (CAFB), and as such has agreed to follow CAFB policies and procedures and Internal Revenue Service (IRS) regulations regarding distribution of donated goods.

This pantry CANNOT:

- Charge a fee or accept monetary donations for food and non-food items you receive.
- Require you to provide a service, participate in a religious event or join any part of this organization as a condition of receiving food.
- Refuse assistance to you based on race, color, age, religion, national origin, disability, gender, sexual orientation or political affiliation.

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openarmsfoodbank.org

Volunteer Information Form

Volunteer Information Form

Name _____

Company/School/Organization _____

Permanent Address   _____

                             _____

Home Phone _____ Cell Phone _____

E-mail _____ Birthdate _____

Why are you interested in volunteering? _____

Do you have any physical restrictions or special needs? No   Yes _____

Do you have any food allergies?   No   Yes _____

Do you have any special skills or areas of interest?   No   Yes _____

Consent Form

I understand that being a volunteer at Open Arms Food Pantry ("OAFP") might occasionally involve working in warehouse conditions, and can sometimes include (but is not limited to) lifting, working around heavy equipment and handling damaged and/or spoiled food products. I hereby accept and assume full responsibility for any injury I might suffer while volunteering at OAFP. In the event of injury (volunteers under 18 years of age), parents/guardians authorize OAFP staff to seek treatment for and take other action in a medical emergency, and I hereby waive and release my right for damages.

Parental Permission: OAFP takes precautions to provide and maintain a safe environment for its volunteers. Volunteers are expected to follow safety rules and all other rules related to the warehouse and pantry area.

Photo release: I hereby give OAFP permission to copyright and/or use, reuse and/or publish and/or republish pictures or images of me for the purpose of illustration, advertising, and promoting OAFP through any medium, including local news outlets and/or websites. OAFP maintains the right to modify these images.

I acknowledge having read and understood the above consent form on:

_____   _____   _____

Date   Printed Name   Signature

                                               _____

                                               If under 18, Guardian's Signature

In the event of an emergency, contact (please print):

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Name   Relationship   Phone Number

Open Arms Food Pantry Logo

MBA PROGRAM AT THE CROSSROADS: CONSIDERING PROGRAM INNOVATIONS FOR CLOSER CUSTOMER-STUDENT ENGAGEMENT

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CASE DESCRIPTION

The primary subject matter of this case concerns strategic managing decisions about the best options for offering the MBA degree considering internal and external demands. The case examines one public university located in Kentucky, Western Kentucky University (WKU). The university name could be removed depending upon the preference of the instructor. Secondary issues examined include issues relating to the curriculum, technology, faculty development, political and structural relations within a bureaucratic organization. Funding models, staffing, and other issues are also included. The case is presented in two parts focused upon two "decision points." While the case has a difficulty level of four, five, and above (appropriate for senior, first year graduate level, and above) this is based more upon interest and understanding rather than difficulty. Since there is little use of statistical analysis the case is accessible to students at all levels. Students need to be able to apply SWOT and industry analysis. The case is designed to be best taught in two or three class hours and is expected to require one hour of outside preparation by students.

CASE SYNOPSIS

Many business students have an interest in the MBA degree, its design, and have their own opinions and preferences on both. It has been common for small and mid-sized universities to offer only a part-time evening MBA option. WKU is in a precarious position at the first decision point in this case: MBA enrollment and graduation rates are moving in the wrong direction for its only option, an evening program. Readers are allowed to innovate and be creative in considering alternative approaches to improve enrollment and graduation rates while meeting external and internal demands. Our business students have always had lots of ideas for how to improve an MBA program. Students using this case in our classes have employed a SWOT and an industry analysis to structure analysis.

WKU decided to address facts in "decision point one" by separating the one program option into four "boutique" or limited sized MBA program options. Small accelerated/full-time, online, professional, and international MBA options were created admitting only the number or students who can fit into a single room. At "decision point two" readers are asked to reconsider, improve, and make other decisions following the initial decision to move to the complex boutique approach. This requires analysis of somewhat fuzzy outcomes along with data on some key variables.

BACKGROUND ON HISTORY OF MBA PROGRAMS

Master of Business Administration (MBA) programs are experiencing changes in demand which are capable of driving innovations in program design as well as modes of educational delivery. The demand for MBA degrees is healthy. The 2015 MBA survey performed by Graduate Management Admission Council (GMAC) reported a 10% increase in the demand of MBA graduates domestically and internationally in just one year, 2014 to 2015 (Estrada-Worthington, 2015). The Corporate Recruiters Survey is a year-end poll of employers conducted annually by GMAC, the owner of the Graduate Management Admission Test (GMAT). The 2015 survey revealed that 96% of employers thought hiring recent business school graduates created value for their companies. Seventy-five percent of employers expect to hire MBA graduates in 2016 and 85% of this group plans to hire as many or more of these candidates than they did in 2015. Further, a majority of employers reported that they expect to increase annual starting salaries in 2016 at or above the rate of inflation for new MBA hires. (2015).

The increase in the employer demand for MBA graduates may be partly explained by a general increase in the stability of the economy. For instance, the U.S. unemployment rates showed steady improvement after the dramatic lows reported at the start of recession of 2009. According to the U.S. Department of Labor's Labor Force Statistics from the Current Population Survey, the national unemployment rate was 10.0% in October 2009 and improved to 4.6% in June 2016 (2016).

Second, increased employer demand for MBA graduates may also partly explained by the increasing availability of MBA graduates. The MBA degree has recently become the most popular master degree in the US. The U.S. Department of Education reported reported that business surpassed education as the most popular postgraduate degree according to 2011-2012 data. In that year some 191,571 students graduated with advanced degrees in business which represented 25.4% of all master degrees (Byrne, 2014).

Third, increased employer demand for the MBA degree may also be explained by the increased complexity and demands of organizational leadership. "Businesses have grown enormously in complexity and scope, and more than ever, they need ethical, skilled, well-educated, creative leaders who are global in outlook," says Paul Danos, Dean of Dartmouth's Tuck School of Business (Byrne, 2014). "Business education in general and the great MBA programs in particular have adapted as these demands have grown, perhaps better than any other form of advanced education."

Recounting the history of MBA programs helps in understanding the current programs. There has been innovation to meet the customer in MBA programs since their inception. Harvard offered the first MBA in 1908 with 15 faculty members and 33 regular and 47 special students (History – About Us- HBS, 2016). The popularity of this new MBA degree at Harvard is well demonstrated by its student enrollment growth: 80 students in 1908, over 300 in 1920, and 1070 by 1930 (Leach, 1993, p.288). Following Harvard's successful lead, the University of Chicago's Booth School of Business started the second MBA in 1940. Even this, the second, MBA program, demonstrates a movement toward a somewhat different customer. The Booth MBA was the first "Executive MBA" (EMBA) which was different because it had different entrance employment requirements and made other modifications to the Harvard-type program (About Chicago Booth: Key Facts, 2016).

These two programs provided two paths for later MBA programs which proliferated in the US and in other countries. The folklore is that the MBA program growth was driven by the need

to provide engineers, and other highly educated individuals without business degrees, with a business education without needing to complete a second undergraduate degree. Generally, the US and international universities offered full-time two-year MBA programs primarily to continuing students and to those willing to leave employment to return to school. More selective EMBA programs also were created in major universities and in urban locations to serve the demands of business at first for the executive suites and later to prepare those who were on a fast track to executive positions. These two programs were positioned to address different markets: students with little managerial or professional work experience (MBA), and those with a lot of such experience (EMBA).

Recently there has been an increase in innovation in MBA "options" in the US. The EMBA has sometimes been separated into different programs: true executive programs; and programs positioned someplace between the EMBA and the part-time evening program. Such programs have names like "Professional MBA (PMBA)," or "Weekend MBA". The level and amount of leadership work experience requirements are often used to separate the "executive" or elite EMBAs from the PMBAs. Yet all of the EMBA derivations generally meet fewer hours than the standard class schedule, in what comes to be called, an "executive" schedule.

There also is a long term trend to offer specialized MBAs "in" topics – like Finance MBA, International Business MBA, Healthcare Administration MBA, and Pharmaceutical Management MBA. The better known "MBA in" programs require the standard broad core of business courses then add a substantial number of courses in the named specialized field.   The MBA Guide from the Australian Education Network (AEN) lists 156 different specializations, alphabetically, from Accounting to Urban Estate Management (MBA Guide, 2016). Specialization can be a way to achieve distinction among the 500 accredited US business programs with the cost being the added credit hours.

MBA degrees also may coordinate with other degrees in a single campus, allowing for simultaneous graduations in a dual degree approach. For instance there are many JD-MBA, MD-MBA, MBA-MSN, MBA-MS and other combination degrees (Hass, 2009). The incentive for the student is that these combination degrees generally share electives so that perhaps 3 elective courses are counted as electives toward satisfying two different degrees.

In addition to combination and specialized degrees, some schools have decided to target a specific student set from the standpoint of enrollment. The "Physicians MBA" at the Kelley School of Business at Indiana University Indianapolis (2016) only enrolls physicians.

Furthermore, some schools have altered their curriculum and/or course scheduling. Many universities now offering "Accelerated MBAs" which has a curriculum and schedule which allows students to graduate in as short as one year. These come in at least two varieties: part of the design of a school's EMBA program or part of their full-time approach. As a result, today there is an alphabet soup of MBA options expanding the early paths of the MBA and the EMBA. EMBA, DMBA (distance), IMBA (international), OMBA (online), PMBA (professional and physician), WMBA (weekend), and many other combinations are now coined by programs and universities.

While the growth of programs continues and innovation in curricula add-ons, the first MBA innovation in delivery occurred when the first online MBAs emerged around 1987. Aspen University, in Denver, Colorado, was founded and offered the first accredited online MBA program in 1987 (eLearnPortal, 2016). The online MBA innovation started during the explosion of distance education using improving technology which allowed the expanded use of the internet and supporting platforms, instructional television, and more immersive video conferencing.

Research performed by Marina Murray revealed that about 50% of U.S. universities that offer master degrees offer an MBA degree (Murray, 2011). MBA program expansions at universities continued even during tough economic times (Alsop, 2006). As discussed earlier in the case, satisfaction with the MBA is high among employers. This satisfaction extends also to both alumni and students. Both groups are very satisfied with the potential benefits of their degree, rate their programs highly, and feel very positive about the value of their MBA regardless of which type of MBA program into which they are enrolled (Bruce, 2010).

BACKGROUND ON THE MBA AT WESTERN KENTUCKY UNIVERSITY

Western Kentucky University (WKU) was founded in 1906 and is public university with about 20,000 students including 2,000 undergraduate students majoring in business and about 125 MBA students. WKU is the second largest university in the commonwealth of Kentucky for undergraduates, third largest overall, and is a comprehensive university offering a full range of majors.

WKU's main campus is located in Bowling Green, Ky. The town has a population of 70,000, and is located 100 miles south of Louisville, KY and 55 miles north of Nashville, TN on the I-65 corridor. WKU has regional campuses in Glasgow, Owensboro and Elizabethtown (also serving Radcliff and the Ft. Knox military base). Bowling Green, KY was recently ranked as # 19 in its ranking for "Best Small Places for Business and Careers" (Forbes, 2009) and #12 as "Best Places to Launch (a business)" among small metro areas (CNN/Money, 2009), The College Heights Herald reported that it was listed in the 2015 Top 10 College Towns to live in (2015), and repeatedly "Top 25 Places to Retire" (Forbes, 2016)

The Graduate School at WKU offers 125 different graduate degrees including the Master of Business Administration (MBA). WKU only recently added a small number of applied doctorates in education, nursing, clinical psychology, and physical therapy. Otherwise, the largest portion of graduate degrees are master degrees.

In June 1963, WKU merged with the Bowling Green College of Commerce, formerly the Bowling Green Business University, which traces its own history to 1892 (Niedermeier, 2003). The Bowling Green College of Commerce and the Graduate School became the first two colleges within WKU's academic structure. In 1998 WKU's business college was named the Gordon Ford College of Business based upon a gift from a successful graduate. The college has been accredited by AACSB International for many years. AACSB accreditation assures high standards in faculty qualification, curriculum relevancy, student outcomes, and resource availability.

WKU had offered the MBA program during various periods in the past but was without one in the early 1990's. Reasons for suspension of the WKU MBA during that period included problems with staffing classes at the distant sites to meet regional demands, meeting AACSB accreditation standards, and low enrollment. Eventually the business community, represented by the Chamber of Commerce and a newly formed Business Advisory Committee, told WKU that local employers needed an MBA program to help with regional economic growth. A new dean formed an interdepartmental MBA committee with broad powers to formulate curricula and establish policies. Input from the departments led the MBA committee to create a 30 credit-hour (10 semester courses) program consisting of one course from each department, a capstone course, and three electives. A new MBA program was designed as a part-time evening program to serve working professionals in the region. The WKU-MBA program was reinstituted in the fall of Year

1. Pent-up demand helped the evening program grow for a few years. After strong growth for 4 years enrollments dropped noticeably by Year 6 of the program.

Internal pressures on the MBA program included staffing concerns related to enrollment and faculty dissatisfaction with student preparedness. In reaction the MBA committee 1) expanded the list of prerequisite courses required prior to taking MBA classes to eight and 2) raised the GMAT entrance minimum to 500 (28th percentile). The minimum undergraduate overall GPA remained 2.75 on a 4 point scale.

Externally the WKU regional campuses were making strong pushes to have MBA classes offered again at their sites. Owensboro, KY was, at the time, larger than Bowling Green, KY but has no four-year public university. Army officials at Ft. Knox wanted WKU to offer the MBA to what could be hundreds of students in the military. In response, a college task committee was formed in Year 6 to investigate how to meet external demands. The outcome was to initiate an all online MBA program in spring Year 7. Since curriculum, admission requirements, policies, and faculty remain the same, the online approach was considered a separate delivery "option" rather than a separate MBA "program." The option was to be called "e^{2}MBA" (executive and electronic). Faculty felt "executive" overstated the category of students we were likely to enroll so the option was called "eMBA." However, the program found that WKU's "eMBA" caused confusion with EMBA (executive) programs in terms of recruiting, rankings, and reporting.

Since some faculty members were inexperienced at 100% online teaching, a series of seminars were offered to those who wanted to teach online MBA courses. Over half of the college faculty attended the voluntary training. The schedule was designed by more experienced business faculty in a unique way based upon the adult-learning theory (andragogy) principle of content focus and immersion. The online program design was somewhat unique. Students took up to one biterm (7 week) course at a time and then move on to another subject, if they wished, in the next biterm. This enabled students to graduate in two to five years. This small online program (25-30 students per class) filled as soon as the option was offered in the spring of Year 8. In Year 9 the number of courses offered was doubled, two courses in each bi-term, to allow for enrollment growth.

Public institutions were under financial pressures during this period and the hiring of additional faculty could not occur. However, the number of undergraduate business students in the college had doubled over the past 10 years. Therefore, faculty schedules were full. Online MBA courses had to be staffed without adding faculty positions. The approach taken was that faculty worked and were paid "off load" - in addition to their normal duties and pay - for teaching in the online MBA option. A fee, $250 per course, was added to the online MBA tuition rate to cover the off load payment to the professor.

The MBA committee adopted a 5-year review for the MBA curriculum. Input from students, the business community, MBA administration, and faculty led to improvements in the program which included expanding the number of credit-hours required for the WKU MBA from 30 to 33. The MBA committee also agreed upon 6 learning objectives and identified strategies for collecting data assessing learning in these areas: leadership in written and oral communication, leadership in team skills and ethical knowledge, applying the best practices, and engaging in critical thinking.

In summary, the MBA added an online delivery option to its remaining part time evening program to better meet the demands of external constituents and operated within internal constraints.

YEAR	EVENTS
Table 1	
WKU-MBA HISTORY	
1963	Business University merges with WKU
	MBA offered at various times
1992	MBA Program suspended
Year 1	MBA Program reinitiated
Year 8	Online MBA starts (spring)
Year 9	Faculty Coordinator position created to manage programs
Year 9	Online MBA doubles capacity
Year 10	Professional MBA and Full-time Programs start
Year 10	"Trilateral" (international) MBA starts
Year 12	Full-time MBA fills, online and Trilateral MBAs underperform
Year 13	"Telepresence" allows 2nd campus to join PMBA (scheduled)
Year 14	Online MBA relaunch (scheduled)

PART ONE
DECISION POINT ONE

There were a number of internal problems related to that remaining part time evening program. Once MBA enrollment fully separated into two groups in Year 9 with the rollout of the online option, the composition of those remaining in the part time evening program could be analyzed more easily.

First, evening enrollment numbers decreased as online enrollments increased. Second, almost half of part time evening credit-hours were now generated by international students. The evening program was a part-time program with classes offered on an 18-month rotation. This time frame did not fit well with the visa residency requirements of most international students. They needed to complete the MBA program in a shorter time frame since they spend one year in their visa allowed two years just studying English in an ESL (English as a second language) program. Many domestic students in the traditional program were "roll-over" or continuing BS-MBA students who wanted to go directly from the undergraduate business program to the MBA program. A few students each year wanted to go on for a Ph.D. and wished to move quickly through the MBA. Other students were temporarily unemployed or underemployed and really wanted a full-time program. Accounting students wishing to sit for the CPA exam had to accumulate 150 credit-hours to sit and they wanted a full-time program. Finally, since most of the online students had substantial business experience, the increasing small number of students with years of business experience remaining in the part time evening program reported feeling "out of place" since they were surrounded with students with little business experience.

Another internal problem was the inability to create a viable MBA Student Association (MBASA) or MBA Alumni Association. The international students seemed to be the only evening students who viewed themselves as sufficiently attached to the program to participate. However, almost all of the WKU MBA international students left the US after graduation for reasons including visa requirements, returning to family businesses in other countries, and other reasons. Domestic evening students failed to join or identify with the MBA student groups.

Internally, there was also a problem with MBA graduation rates for evening students, especially domestic students. Class sizes, while declining in the evening, were still acceptable.

However, only a small number of these students actually graduated in any given year. In summary, the program was not successfully addressing the needs of a several sets of students. The evening program only seemed to be meeting the needs of the kind of domestic student who wished to take an MBA class every once in a while and was not focused upon degree completion. MBA leadership, which included faculty and staff, needed to rethink the part time evening program now that the online MBA was having success.

At the same time, there were significant external demands related to the MBA program. Several physician/entrepreneurs asked for an MBA open only to doctors. A study was conducted in Year 8 to determine whether there was a critical mass for creating a "Physician's MBA" cohort, like the Indiana University at Indianapolis model mentioned earlier in the case. While there was insufficient interest in terms of numbers to create an entire physician's cohort in Bowling Green, KY, the resulting community dialogue was interesting. When feedback on the physician MBA study was shared, broader community interest in the MBA degree emerged. Input from the college business advisory board and university's business advisory panel indicated support for the creation of a "professionals MBA" cohort using an EMBA model targeted to serve regional managers and professionals.

Externally, there were also competitive moves from other MBA programs in the region at this time. This included one from the University of Louisville (UofL), the closest large public institution within the state. UofL was creating a weekend "Professional MBA" with higher than normal tuition and its advertising included the local Bowling Green market. WKU's president asked the WKU MBA program whether it had any plans to meet this competition from a rival institution.

Kentucky, and most of its border states, have lower than the average number of undergraduate and graduate degrees per capita compared to the national average. This means the market is not saturated with MBA degree holders.

At this point the MBA program was considering how to meet the internal and external demands while still operating within very tight internal parameters. Tough state public finances would not allow additional hiring. Limited MBA operating expenses, including marketing, also could not be increased unless added fees could be approved on MBA classes. Now that enrollment in the evening program was dropping, the MBA program was at a crossroads.

PART TWO
DECISION POINT TWO

All of the internal and external demand demands and opportunities were shared with the MBA committee in meetings throughout Years 9 and 10. The committee decided that the MBA program could not solve its problems and meet its demands using the current part time evening option and the new online MBA. WKU's MBA leadership consisted of a newly appointed program director who was also a faculty member, an MBA admissions advisor who was a staff member, and a MBA faculty committee representing the 6 business departments. MBA leadership decided that the program should move closer to serving different future student's needs using a more complex, three-pronged approach: 1) a new one-year, full-time "accelerated" option to meet the needs of international, roll-over, advanced degree-seeking, and accounting-CPA students; 2) a "Professional" MBA (PMBA) option with executive MBA style policies for experienced professionals and managers; and 3) maintaining the online MBA as the part-time option. Each option (full-time, professional, and online) would be small in enrollment, typically 20-35 as a class size. Such niche or limited-sized options have been called "boutique" program options.

In fall of Year 10 the new full-time and PMBA program options were rolled out. Each was a lockstep option. This means that students were locked into a particular schedule of courses. This had to be done in the fulltime program since the number of sections had to be limited to the number already being offered in the evening program. Full-time MBA classes, like the in the evening program option, were always staffed "in load" meaning faculty taught these courses as a regular part of their schedules. This was in contrast with the new online MBA program which had to be taught off load.

Each new option was also a cohort program, meaning that classmates entered together in the fall, took all classes together, and graduated together.   The full-time option was also "accelerated" meaning that students graduated in 12 months. Full-time students took 12 credit hours in both the fall and spring terms and 9 credit hours in the summer. The PMBA option met every other Saturday with two classes per semester, three semesters per year, allowing PMBA students to graduate in two years, six semesters. Online MBA students were able to take one bi-term class per bi-term, which amounted to 2 per semester.

The online option also was mature enough for reevaluation. In Year 10 a survey of online MBA students assessed the effectiveness and preference for the innovative biterm format. The survey revealed that about 90% of the students had a preference toward the biterm format and only 10% wanted to change to a regular semester (16 week) format. This validated using adult learning principles in the online option design.

The financial model for the PMBA required groundbreaking cooperation from various arms of the university administration which allowed the MBA program to charge and keep substantial PMBA fees to pay off-load faculty, market, and administer the program option. The continuance of the online option also required financial arrangements more favorable to the college to also pay for those same expenses, including the off-load pay to online faculty.

Since the college had its first one-year MBA program it was able to cooperate with an international program about which it was aware called the "Trilateral MBA" (TMBA). This program was a cooperative venture in which three colleges shared resources to create an international experience for their students. A French-speaking university in Canada, a Spanish-speaking university in central Mexico, and WKU in the US each agreed to allow four students from each school to attend their schools in rotation but only pay tuition to, and receive degrees from, their home schools. This twelve-student cohort would spend one semester together in one country them move on to the next until all three countries and semesters were complete. Each college received three semesters tuition from its four students for a total of 12 tuitions. Since each college would host the 12 students for only one semester the number of tuitions received would equal the cost of the one semester in which seats were actually used. All classes were in English. The TMBA, therefore, became the fourth program option.

Enrollments under the new four-option boutique approach showed the following (see Exhibit 2):

a) Full-time enrollment was 14 (Year 11), 22 (Year 12), and 28 (Year 13 estimated). Seats in all full-time classes were actually always over 25 since students from the evening program were allowed to populate the new full-time courses. Enrollments almost achieved the enrollment target of 25 by the second year.

b) PMBA enrollment for the first cohort was 22 (Year 11), 17 (Year 12), and 17 (Year 13 estimated). This option has attrition of about 20%, the cohorts overlap (classrooms have 1st and 2nd cohort students attending at the same time), and so the combined number of PMBA students at any one time is about 35. The individual cohort number which seems to be settling at about 17 is

lower than expected, since the original targeted number was 25. However, the option is financially viable if the enrollment stays above 12. The other large town in the region, Owensboro, seeks its own cohort but cannot guarantee that a class will have sufficient students. Further, MBA resources will not support staffing of classes at both a second site and on the main campus.

c) Online enrollment declined by 13 students the year the PMBA program started. Cannibalization of enrollments was expected since both options target similar working students. However, online enrollments that peaked at 62 (Year 10) dropped to 49 (Year 11), 41 (Year 12), and 43 (Year 13 estimated).   Internet marketing of the online program, including Google advertising, failed to drive applications in Year 12 or Year 13.

d) Under the agreement between the three schools cooperating in the international TMBA program, each school is obligated to enroll four students. The first year there was little time to recruit and only one WKU MBA student enrolled.. WKU improved to having 3 TMBA students the next but instead of continuing to progress toward the required 4 students the next year WKU failed to enroll any TMBA students at all. This failure to enroll any TMBA students from WKU creates a significant financial loss since there are no tuition dollars to cover the tuition costs to WKU of the visiting students from Canada and Mexico.

e) MBA student credit hours show significant increases since the move to the four boutique program options. The increases in credit hours was 26% (Year 11) and 36% (Year 12) showing that MBA students are taking more courses. While the headcount ("total enrolled") has remained relatively stable near the 5-year average of 128, the number of classes taken per student has increased 41% over the two years since the change to boutique options.

f) Degree completion is also up dramatically. The all-time peak was 59 degrees conferred a few years after the evening program was reinstituted was surpassed in Year 12 at 70. The increased graduation rate was not seen in the first year after the change since the first cohort of PMBA students had yet to complete the program. However, the new rate should remain the current target on a year-to-year basis since all programs are graduating students.

Problems that need to be addressed at the second decision point include the concern for the viability of the TMBA option. The vision statement of WKU is "A leading American university with international reach." Every WKU program needs to consider what it does in terms of meeting the vision. This year nearly $40,000 tuition expense will be deducted from an already small MBA budget to pay the tuition costs of the visiting TMBA students from Canada and Mexico under the Trilateral MBA agreement. The MBA program cannot handle the risk that such financial losses will continue. If the TMBA relationship is discontinued based upon the lack of student interest are there structural alternatives to offer significant international study to MBA students to meet the challenge of the WKU vision statement and best practices in business education?

Sluggish online enrollments continue despite the college's rating as "Best Buy" by rating websites that cite the comparatively low tuition charge by public institutions in Kentucky and the AACSB accreditation of its business programs. However, there are dozens of online MBA options accredited and non-accredited. Many of these have large national marketing budgets. Others, especially non-accredited MBA program with smaller marketing budgets, rotate accelerated and online programs into areas like the Bowling Green area. While some online programs are relatively expensive, almost all non-accredited programs have little or no entrance requirements.

Some design issues are being reevaluated including whether online students should be limited to only 2 classes per semester. Another benchmarked institution in the state allows online MBA students to take up to 4 classes per semester and has very strong enrollment numbers at the same time WKU is stagnant. Nine credit-hours in a semester is considered "full-time" status for

graduate students seeking financial aid and full-time students have greatly expanded financial aid opportunities.

Another issue is whether the "biterm-only" approach should be kept. Admission requirements are also higher at WKU than the other benchmarked institution and might explain some enrollment differences. A recent study of online WKU MBA students found that a huge majority liked the biterm approach and did not want it changed. However, anecdotal evidence from email and telephone calls tell a different story: that many people shopping for an MBA degree want to be able to take more than two classes. These two items are related since biterm classes are necessarily more concentrated and eliminate degrees of freedom found normally in a 15-16 week course where a student could get behind but have time to catch up. It may be hard to take two biterm classes, for instance one in finance and another in accounting, all within a 7 week term. However, if a student took one class in each biterm and a third class over 15-16 weeks the load may be more manageable.

The marketing approaches used can also be reevaluated. The MBA program spends approximately $15,000-$20,000 per year in marketing. This money comes entirely from fees assessed to online and PMBA students. These fees also are used to pay the faculty that teach the online and PMBA classes. A mix of advertising elements are used including billboards, local radio and local TV ads, print ads in local newspapers, brochures, information meetings at regional sites, public relations, and other marketing items.

Another approach could be to simply "right-size" the number of online course offerings to create higher enrollment numbers per class which only average about 17 per class. One dynamic in online enrollment at WKU and other programs is that only about 2/3rds of admitted online students ever take classes in any given time since convenience and flexibility are elements which attract online students.

Enrollments in the PMBA program are considered successful but are also being reevaluated. The highest enrollment for the PMBA program was 22 but the last two cohorts averaged 16 each. Since one of the elements credited with initial success of the PMBA option has been the cohort or team concept the program does not want to threaten that aspect. Students enter the program in a cross-discipline study team and remain with those members to graduation. While adding the typical university 2-way instructional television (ITV) has been rejected as inappropriate as an expansion idea for this group of managers and professionals, there is consideration of using cutting edge videoconferencing technology. Expensive "telepresence" and similar approaches which use high definition, large screen panels that show distant participants life size are being investigated as ways to include Owensboro managers and professionals in a PMBA cohort.

Table 2 MBA ENROLLMENT								
	TMBA	Full-time	PMBA	Online	Evening	Headcount	Credit-hours	Degrees
Year 2					72	72	537	36
Year 3					109	109	904	28
Year 4					170	170	2037	41
Year 5					168	168	2207	59
Year 6					163	163	1761	54
Year 7				26	136	162	1779	38
Year 8				44	87	131	1482	25
Year 9				54	82	136	1460	53
Year 10				62	61	123	1603	42
Year 11	1	14	22	49	40	126	2013	41
Year 12	3	22	35	41	23	124	2735	70
Year 13 (estimates)	0	28	32	43	17	120	2800	70

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GOLDEN TOWERS: A FAMILY BUSINESS IN TRANSITION

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CASE DESCRIPTION

This case depicts the complexities of operating a family-owned and -operated business. It is appropriate for courses in family business, small business, and entrepreneurship. It can be used in a family business course to demonstrate the difficulty of choosing a successor who will ensure the company's health and be an excellent steward of the family. It captures several family business concepts, some of which include succession and business planning; estate planning; family dynamics challenges; and the systems theory perspective depicting the interaction between management, ownership, and family subsystems. Also, it may be used in small business and entrepreneurship courses to discuss business continuity, creating and implementing an entrepreneur's vision, and the practice of entrepreneurship. Students can expect to be challenged at level 4, which is suitable for undergraduate, senior-level courses. One class session of one or two hours in length is appropriate for this case. Students should set aside at least one hour to prepare.

CASE SYNOPSIS

Thomas Callis Jr.'s announcement that he would step down as general manager of Golden Towers Hotel signaled the beginning of a transitioning period for the family and business. The family had gone through this process once before when Thomas Jr. succeeded his father. Thomas Sr. planned poorly for his succession. When he fell ill, Thomas Jr. struggled to take charge of the company. There was no estate plan in place, and it left the family scrambling to make legal provisions before he passed. Thomas Jr. hoped not to repeat the mistakes of his father, but he too procrastinated and found himself at the age of 65 just crafting a succession plan.

The business thrived over 60 years and supported several generations of Callis'. Thomas Jr. had several sons working in the hotel, but favored one to take his place as general manager. Several siblings wished to be considered for the position and were less than pleased with their father's decision. The troubled relationship between some siblings began to negatively impact work at the hotel.

The would-be successor and Thomas Jr. also differed fundamentally on their vision for the hotel. A new competitor was soon to enter the market and test the hotel's ability to compete. Where Thomas Jr. wished to continue a focused approach, the named successor believed in company diversification and had several bold ideas for moving the business forward. Thomas Jr., therefore, had to be strategic in granting decision-making authority and ownership to his son. Thomas needed to act quickly in deciding what would be best for the family and future of the hotel.

AN INTRODUCTION

Thomas Jr. walked into his office, slammed the door behind him, and hurried over to the window. Deep in thought, he shook his head and pounded his fist against the glass. The stormy March weather mirrored his mood perfectly. "How can I make this better," he mourned? Just three months earlier he announced to his family he would step back from the business. It was at Nathan's 26th birthday. All the children were gathered at Thomas' house for dinner. Thomas even made sure to have Nathan's favorite chantilly cream cake from Gilly's Bakery. After dinner, they had all retired to the porch with cake and coffee when Thomas announced his intentions concerning the business. He was worried about how his children would take the news. He knew it would be difficult to make everyone happy and still do what was best for the business.

Thomas Jr. had continued the legacy of his late father, who started the Golden Towers Hotel in Savannah, Georgia in the 1950s. At age 65, Thomas Jr was ready to pass the business to the next generation of Callis'. Staring out the window, Thomas thought to himself how much easier it had been when he took over the business from his father. There were few choices for who and what he would be. His father brought him into the business at the age of eight. He helped wash cars of the guests. That was the first job he remembered having. The family business was all he knew – all he wanted to know.

As Thomas stood at the window, he knew he had to make several critical decisions concerning his family and the business. He chose his successor, but several of his other children responded poorly to the decision. Both work and family relationships were strained. As Thomas Jr. grappled with succession issues, the threat of a new competitor loomed over the business. Thomas Jr. and his successor had different strategies in mind for moving the hotel forward. As such the direction of hotel and the family's involvement in the business were uncertain. Thomas Jr. needed to act quickly and decisively.

BACKGROUND OF THE BUSINESS

Golden Towers Hotel was opened in 1954 by Thomas Callis Sr. and his long-time friend, Joe Dillan. At the time, the business was just two stories and a basement level, but the two wanted the name, Golden Towers, to reflect what ultimately the hotel would be. Owning a hotel was Thomas' dream. During their service in the United States Army, Thomas talked of nothing else. He would say again and again, "Joe, when we get out, we are in business, and it's going to be golden." It was some years after leaving the Army before the two would make headway on their plan for a hotel. When Thomas returned home, he worked in his uncle's thriving tavern and restaurant in Savannah, Georgia. He also earned an undergraduate degree in general business. When his uncle was ready to retire and sell the business, Thomas was poised to buy it and make it the future location of Golden Towers Hotel. He negotiated with his uncle to buy the property at $150,000 and make payments over six years.

Construction of Golden Towers Hotel took four years to complete. Joe came on board to help oversee the property renovation and was Thomas' assistant manager. As the property was large enough to accommodate the expansion, the new development was constructed on the existing site. A business loan provided most of the needed financing; however, as the cash-cow of the business, the tavern remained open the longest to help fund the renovation. Piece by piece the new replaced the old until the hotel was finished. At its opening, it had eight standard rooms, four guest suites, and a dining facility. The aesthetics of the hotel complemented the historic allure of the

Savannah district. When compared to other hotels in the area, it was small, but had a charm all its own.

The first few years of operation were lean. It was difficult for the hotel to gain traction in the local hotel market, but it was eventually modestly profitable. Having a young family of his own, Thomas was concerned about his ability to provide them financial security. Thomas married his long-time sweetheart, Dianne, right out of the Army, and shortly after they had a son, Thomas Jr. The family spent a great deal of time together at the hotel. Dianne assisted Joe in running the restaurant and soon enough Thomas Jr. also helped by running errands and performing small chores. The hotel was an extension of home.

Thomas Jr. entered the business formally in 1969. He was twenty at the time and fresh off a small tour across the South East with his swamp blues band. Thomas Jr. was smart, creative, and a bit of a free spirit. Although Thomas Sr. wanted him to assume a full-time position in the business years earlier, Thomas Jr. negotiated with his father to have two years during which he could indulge his music passion. In those years, Thomas' band gained a small following and experienced relative success. When it was time to enter the business, he did so without apprehension. He supported the dream of his father and always saw himself as an integral part of it.

Joe mentored Thomas Jr. in the ways of the business. He quickly grasped the operations-side of the hotel and had a great many ideas for making things more efficient. Thomas Jr. wanted Golden Towers to step out of the shadows and become one of the leading boutique hotels in the area. Father and son shared a loving and respectful relationship; however, the one point on which they disagreed was their vision for the business. Thomas Sr. had more conservative views concerning the business. Thomas Sr. thought his son often overstepped his bounds as a junior member of the business; Thomas Jr., however, believed asserting himself would ensure the business continued to evolve and grow.

Thomas Sr. foresaw that when his son joined Golden Towers he would eventually take over from Joe as his "right hand man." Joe had expressed a desire to step away from the business in a few years to pursue some of his other interests. This arrangement gave Thomas Jr. enough time to learn the business and benefit from both his father's and Joe's mentorship.

THOMAS JR. TAKES THE HELM

When Thomas Jr. took over from Joe in 1979, the business grossed annual sales of $1.95 million dollars with 3% net profit. Within five years, he reduced operation costs in the dining area and moved the net-profit margin to 8.7%. The hotel provided only a limited variety of pre-made breakfast options. Guests did not find the options particularly appealing and commented about being able to find much better items in town. This meant food at the hotel was often left uneaten and later discarded. Thomas Jr. addressed those losses by partnering with a few local bakers and vendors to provide specialty food items that were enjoyed by guests. He also hired a young chef to make fresh plates and added a brunch menu. The number of patrons opting to have breakfast or brunch at the hotel before heading into town doubled. Thomas Sr. was very pleased with these types of improvements, but he thought some of Thomas Jr.'s other ideas, like his proposal for a $650,000 hotel expansion, were much too risky. Unlike Thomas Jr, his father believed in a slow and steady approach to sustainability.

In 1981, Thomas Sr. was struck with a massive heart attack that debilitated him and left him unable to oversee the business. Thomas Sr.'s poor health put a great deal of stress on the family and the business. They were unprepared for the effects his incapacitation had on the day-

to-day running of the business. Thomas Sr. had additional health complications while in the hospital and was in no position to make decisions about the business. The family had never thought about obtaining a power of attorney for Thomas Sr. The entire business was owned by Thomas Sr., and Diane had no authority to act on his behalf. Thomas Jr. did his best to assist his mother in taking care of his father while he recovered. Diane stepped away from the business completely, while Thomas Jr. spent every moment trying to fill everyone's role. He pleaded with Joe to return to the business for a few months to help manage things. Joe was more than happy to assist but could do so only in the evenings.

Thomas Sr. was a successful business man, but he kept his ideas and processes in his head, never taking time to record them. Thomas Jr. warned his father about the dangers of this, but it changed little. Now that Thomas Jr. was in charge, it all but infuriated him to have to make guesses about his father's dealings. With great effort, he and Joe managed to do enough to keep the business in good standing. In his private conversations with Joe, Thomas Jr. vented about the difficult position in which his father had put everyone. "Things have to change," he said.

Had it not been for Thomas Sr's illness and impaired recovery, Thomas Jr. would have found it more difficult to take charge of the business. Thomas Jr. filled his father's position as General Manager, while Joe stayed on as the assistant manager for another year. Diane returned to assist with the dining facility on a temporary basis. It was another 10 years before Thomas Jr. would own a majority stake in the company. Thomas Sr. retained 25% of the company and Diane 15%. Upon their deaths, Thomas Jr. received full ownership of the hotel. During this time, Thomas Jr. married and started a family. His wife, Christelle, gave him five children: Maury, Terrance, Nathan, Joseph, and Cleopatra. Sadly, Christelle passed away in childbirth. Thomas Jr. later met Joanne. She raised the boys with Thomas Jr, although they never married. A genogram of the family appears in figure 1.

Golden Towers grew to three times its original size under Thomas Jr.'s leadership. He had a knack for "seeing the possible." Thomas' aggressive marketing positioned the hotel as an ideal location for wedding guests and vacationers. Guests came from several states away, and the hotel often was booked, on average, at 79% capacity. This was considerably higher than some of the surrounding hotels. In 2003, the hotel was renovated and expanded. Two additional stories were added and a modest parking structure set in place. Even the paltry dining facility was remodeled and expanded. It was no longer hidden away within the hotel, but stood annexed alongside the hotel. This arrangement gave the sense that it was independent restaurant. While breakfast and brunch remained exclusively for guests, the restaurant welcomed the public for dinner. A local expert chef was hired to elevate the dining experience. Thomas was especially proud of how profitable the hotel managed to be and the stability it provided his family.

A NEW GENERATION OF CALLIS' AT GOLDEN TOWERS

Several of Thomas' children joined the family business. Maury started at the hotel shortly after completing his international business, undergraduate degree in 2007. Thomas mentored Maury closely and groomed him for the role of Director of Sales and Marketing. They had complementary ways of thinking that fostered a good family and work relationship. Maury had an eagerness about him that reminded Thomas of himself when he started at the hotel. Thomas thought this was a wonderful quality, in addition to Maury's general humility when learning new things. Maury spent two years working on the operations-side of the hotel before moving into sales and marketing. Thomas was happy with Maury's performance as Director of Sales and Marketing.

He integrated new guest management technology and made the hotel's website more attractive and user friendly. Guests were very complementary regarding efforts in his department. Maury created a marketing campaign that drew more attention to the hotel in off-peak periods, and over two years saw reservations increase by 15%. Maury also built strong relationships with local event promoters, which raised the profile of the hotel's restaurant.

Joseph was the youngest of the Callis brothers and managed the business office at the hotel for three years. As the office manager, he oversaw payroll and employee scheduling in addition to supervising four assistants. Joseph ran an efficient office and employees at the hotel enjoy his easy-going nature. Joseph worked as the assistant manager of a fast-food chain before he joined the family business. He had a disagreement with management about his career advancement and decided he might have better opportunities at Golden Towers.

Terrance was the only child to possess a graduate degree. His dealings with the hotel were sporadic. He had on occasion performed financial audits for the hotel and advised on financial matters. Nathan worked part-time at night and on weekends as a front desk supervisor in the hotel. He liked interacting with the guests and was happy to make extra money to support his somewhat extravagant lifestyle. Cleopatra supported the family and family business but chose a different life for herself. Cleopatra was a successful tax account in a local firm.

PASSING THE LEGACY: ROCKY FIRST STEPS

It was on that stormy March morning that Thomas asked all his children to gather for a closed meeting at the hotel. The Callis brothers were arguing more frequently, and Thomas Jr. was sick of all of it. The day before Joseph and Maury could be heard shouting in the business office.

"How could you give Tony time off and not run that decision by me first?" yelled Joseph. "It's my department and my reputation on the line when my department messes up. Maury, you have to be more considerate of what's going on around here. We ended up short-staffed at a critical time."

Maury responded by saying he didn't think it was a big deal, which made Joseph even more infuriated. This was just one example of how strained the relationships had become between Maury and the brothers. Maury was favored by Thomas Jr. to take over as general manager of the hotel. Joseph, more so than the other brothers, resented the implicit assumption that Maury would naturally be in charge. The brothers did not question Maury's competency, but they thought Maury acted entitled. It created a *he-versus-them* dynamic that was problematic.

In the meeting, Maury stood up and announced, "I'm taking over from dad." The room went silent. Joseph was the first to speak.

"And when is this supposed to happen? We haven't even talked about this Maury."

Just then Thomas Jr. interrupted, "Calm down everyone. This was the reasons I called a meeting; we need to plan for this transition of power."

Terrance held his tongue until then but could no longer be quiet. "It seems we are having this discussion one decision too late. We didn't even discuss Maury being chosen as your successor. Were the rest of us even considered, dad?

"Of course I considered all my sons, but Maury is best suited for the position. He has the most experience and will do a great job. Besides, it is my company, and I choose who takes it over." The room went silent once again.

Then Terrance asked, "What about ownership of the hotel? Are decisions being made about that too?"

Maury looked at his dad and said, "Of course, I expect ownership to transfer to me once dad retires."

Thomas had three goals for the family meeting. First, he sought to tell the family he had chosen Maury as his successor. Second, he wanted to discuss his diminished role in the business and ideas for transitioning Maury to the general manager position. Last, and perhaps most contentious of all, he needed to discuss dividing shares in Golden Towers and his retirement earnings. Thomas Jr. owned 100% of Golden Towers Hotel. The estimated value of the company's assets was $6.8 million. Thomas did not earn annual dividends on company shares. He drew an annual salary of $235,000 from the business. His sons who worked in the business draw salaries commensurate with their job duties. Thomas' health insurance, life insurance and leased Mercedes vehicle were all paid for by the company. The home in which he lived was no longer mortgaged. Thomas had other personal assets including stocks, real estate, and cash. Thomas had been concerned for some time that he was behind in his estate plans. To prepare himself, he consulted a local lawyer with expertise in family-business matters. The lawyer expressed the need to have a valuation done of the business, create stock options for the heirs, divide ownership of the hotel, and transfer ownership in a strategic fashion. These matters had to be discussed with the family.

Thomas had only broached the topic of dividing Golden Tower shares when talks altogether broke down. Thomas insisted that he retain majority voting rights. He wished to give Maury 17% as the new general manager and each of the other children 8%. Nathan and Terrance thought Cleopatra's shares should be reduced to 4% given her inactivity in the business. Cleopatra believed she should receive whatever her father wished to give her. She was not angry at the boys for asking their father to reduce her shares, she just hoped the brothers would at least believe she deserved it.

Maury was concerned that together his brothers had more ownership in Golden Towers than he would as the general manager. The brothers took this as a slight against each of them and insisted again that Maury acted too entitled. Maury expressed his concern over having insufficient power to make decisions as the General Manager. Privately, he wondered if his father doubted him, if somehow his father would struggle with stepping away from the business. Maury was anxious to know when his father would retire from the hotel. Thomas had in mind that he would remain the general manager for another five years while Maury shadowed him. Maury believed, however, that he would be ready to take over within two years.

Maury looked over at this father and asked, "When will I ultimately have controlling interest in the hotel?

"I need to think about that" replied Thomas. Thomas became very uneasy with Maury's remarks concerning controlling interest in the company. He wondered if Maury wanted him to quickly step away from the business. That was not Thomas' plan.

Just then, Joseph stood up and said, "I guess I'm no longer needed here; I'm clearly just a spectator. Frankly, I don't know if I have a future at this hotel" Thomas urged Joseph to stay, but he stormed out. The meeting soon after degenerated. Thomas asked his remaining children to meet again at his home over the weekend. "I'll talk to Joseph" he promised. He then turned and exited the room.

WHAT WILL BE THE FATE OF THE CALLIS LEGACY?

Cleopatra followed her father back to his office and soon could be heard at the door. "Dad are you okay?" Before Thomas could answer she continued, "That could not have gone the way you intended. The boys are so upset. Dad, you should have handled that announcement differently.

> Cleo, you're so much like your mom. She was direct too, but she also knew how to listen…how to make the boys feel heard. I need your help. I want this hotel to remain in the family for generations to come. It's what your grandfather dreamed of for the family. I…we need to decide our next steps very carefully. The family isn't my only concern though. I've recently learned the old Manor Estate two blocks away has been bought by a developer with intentions of opening a bed and breakfast (B&B) within the year. It's not the only B&B in town, but it's certainly the closest to us, and it's in a slightly better location to the waterfront. What I know of the existing infrastructure suggests the room capacity will between 10-12 guest units. I've shared this information with Maury. We agree there are areas in which we clearly stand out, such as amenities, parking, guest packages, capacity, and the restaurant; but, we are unlikely to undercut their price. Maury and I disagree on the way forward, however, and this transfer of power further complicates matters.

Thomas believed the best option for viability was to focus on the immediate threat of the new B&B and implement strategies to withstand the impact of this competitor. Maury recognized the challenges posed by the new B&B but believed a better strategy would be to grow and diversify the family business. This approach he believed would make the company more resilient to threats of this kind. Maury also wanted to expand the composition of the hotel's leadership team. He thought an outsider with expertise in growing a small business could help the family business move in a new direction. Thomas was skeptical about adding non-family members to top management. He was uncertain whether an outsider would be truly beneficial.

This matter made decision-making authority and ownership far more relevant to Thomas' succession plan. If Thomas gives up majority voting rights or steps away from the business too soon, it might be to the detriment of the family business. Yet, he must be careful not to hamper Maury as he tries to make the business his own. Each generation needs to define the company going forward. Each successor needs to take ownership of the vision of the company to be a strong leader and keep that entrepreneurial spirit. Thomas wished to avoid repeating the mistakes his father made with his own estate plans. He could not ignore that he was already 65 years of age. What if he suddenly fell ill or died. What, then? Accordingly, Thomas needed to act quickly in deciding what would be best for the family and the future of Golden Towers Hotel.

Figure 1
Callis Family Business Genogram
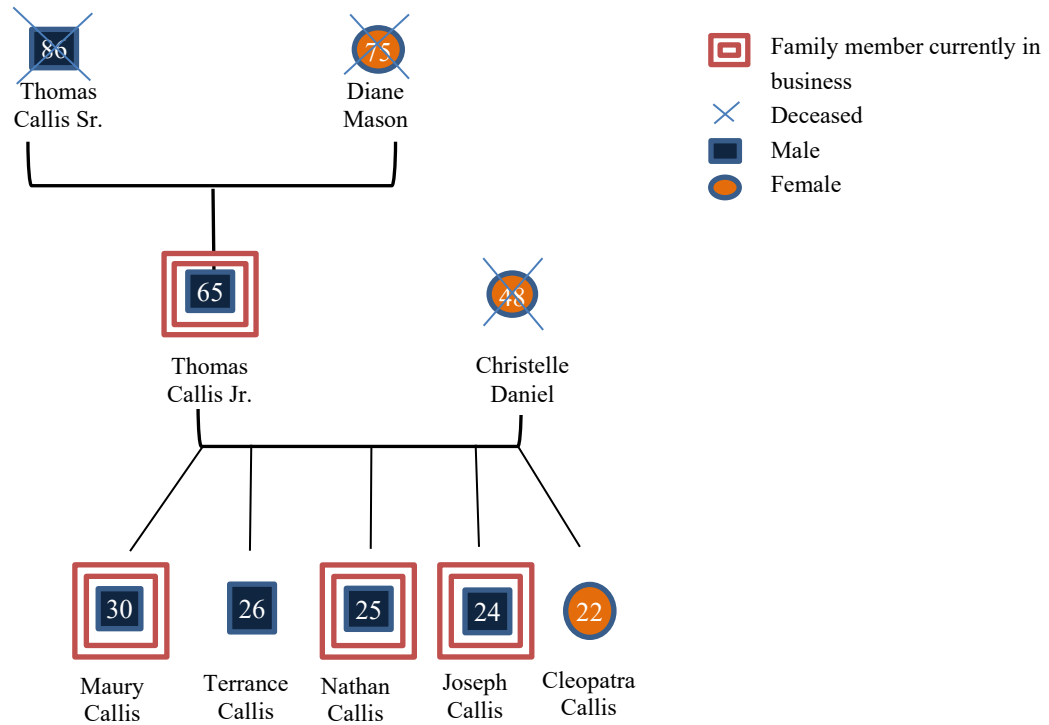
ENCOMPASS SOFTWARE: MANAGING ENTREPRENEURIAL GROWTH

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CASE DESCRIPTION

*The primary subject matter of this case concerns **Entrepreneurship, Entrepreneurial Marketing and aspects of New Product Development in an entrepreneurial context.** This case addresses key issues faced by entrepreneurs when transitioning startups into successful long-term ventures. Specifically, the case explores the key tasks to be undertaken in a business (a technology firm focused on the development and commercialization of software with utility in scheduling patients in a health care setting) and encourages students to consider the priorities needed for continued success. The case has a difficulty level of three, appropriate for junior level courses in entrepreneurship and marketing. The case is designed to be taught in a 75-minute class period and is expected to require up to 2 hours of outside preparation by students.*

CASE SYNOPSIS

The case is written from the perspective of the protagonist, the CEO of Encompass Software, a startup company dedicated to the development and commercialization of software with utility in scheduling patients in a health care setting. The CEO faces a challenge critical to the company's continued growth.

In this case, the CEO must decide how to best position the company for continued success in an increasingly competitive environment.

[NOTE: This case is a fictionalized account of a real-life situation. While names and other identifying information are changed, the facts and situations are true to the real case. Additionally, the actual dates and timeframes of the industry statistics presented are adjusted for the purpose of this case.]

ENCOMPASS SOFTWARE: TRANSITIONS

It seemed like just yesterday when Jane Haywood started Encompass Software, a health care software company. Here she is, three years later, serving as CEO of a successful company. Haywood understands the inefficiencies and complexities of the health care market. She knows doctors are frustrated with dealing with the manual process of hospital scheduling, where they spend on average 15 minutes per person booking needed appointments for their patients. So, she devised a more efficient and convenient way for patients to schedule appointments, one that saves doctors, clinics, and hospitals time and money. The Encompass system, SchedEaze, the company's only

product, completes what used to be a 15-minute scheduling process in less than 60 seconds (See Industry Overview for details on scheduling systems and their benefits).

Thus, with hard work, Haywood grew her idea into a thriving, respected business. Last year, Encompass posted $3.2 million in revenue and had a profit margin of 20%, double the industry average. The company has 30 top health care facilities as clients and a great team with whom Haywood is proud to work. Moreover, she has learned much along the way.

Taking an idea and making it a successful business endeavor required more thought and execution than Haywood had envisioned. Having a superior product offering was just the start and Haywood and her team spent much time creating a strong brand for the company. She has developed a superior vision for customer service, and her team built on this by implementing a service model universally praised for its quality and responsiveness. In fact, Encompass is ranked as best in the category (enterprise scheduling) for service and product features as rated by several prominent industry research groups.

SchedEaze customers are pleased and often serve as advocates and promoters for the company. They are eager to speak positively to potential clients. They provide Haywood and her team with valuable feedback and she enjoys meeting with them on site at their facilities. Together, they discuss how SchedEaze has dramatically improved their ability to meet the scheduling needs of doctors and patients. SchedEaze offers the advantage of allowing doctor staffs and patients to schedule themselves via the Internet, so they can bypass calling the hospital if they desire. For hospitals, SchedEaze saves time and money by automating the process, thus reducing the number of personnel involved. Furthermore, because the system is entirely automated, hospitals no longer need highly paid medical experts to schedule appointments. Instead, a patient's appointment can be automatically completed by simply pressing a key.

While pleased with the company's progress, Haywood learns of other issues that surround hospital scheduling and negatively impact her customers. Hospitals describe the difficulty of collecting accurate information on patient demographics (including name, date of birth and address) during the scheduling process, resulting in an inability to collect monies due. Hospitals also report significant difficulties in verifying that insurance carriers will cover the procedures requested, and in reminding patients of scheduled appointments[i].

Haywood and her team believe they have also learned how to optimize sales. They work with "gatekeepers" to gain access to hospital decision makers and develop relationships with "user advocates" to internally promote the Encompass solution. These gatekeepers tend to be hospital management involved with patient registration. Also, the company is doing a much better job of "pre-qualifying" clients by identifying who the decision makers are and at what stage they are in the purchasing process.

Encompass marketing efforts have also proven to be successful. In contrast to its competitors, the company uses a modern, light-hearted approach to its advertising campaigns, resulting in increased brand awareness for the product and company. As an example, Encompass' "She wants a barium enema and she wants it now" advertisements were selected as "best innovative ads" by Modern Healthcare, the leading hospital trade publication.

Finally, SchedEaze has developed into one of the most reliable systems available.

Haywood's technical team puts in long hours ensuring the system works consistently and is bug-free. They also work to rapidly develop, test, and implement incremental improvements to improve the patient scheduling process. For example, when the Encompass customer support staff observed that it typically took the user ten keystrokes to complete a certain task, the support staff worked with SchedEaze programmers to streamline the process, reducing it to just two keystrokes. This change resulted in a faster, simpler process that eliminated mistakes. All in all, Haywood is happy with the company's progress so far and the results she has achieved and is proud of the recognition Encompass has received in the market. Though, there is no time to rest on her laurels. Competition is increasing and new companies are entering the growing market. Their product offerings are continually improving and catching up with SchedEaze; for example, some systems feature automated processing capabilities, although these are still limited in functionality. This automation has been one of SchedEaze's primary differentiators in the market to date and Haywood is concerned.

Growing substantially in the past three years, the scheduling market consists of three main vendor groups. Included are significant health care information systems players and mid-sized companies. These vendors offer product suites with a scheduling application that can run standalone or as an integrated component to a complete hospital information system solution[ii] . However, most of these systems provide optimal functionality only when implemented with other systems offered by the vendor. Finally, niche vendors such as Encompass focus solely on enterprise scheduling.

Encompass' two primary competitors are a much larger company and a smaller one that has been in business for five years. The large competitor, MacPhearson, generates some $2BN per year in revenue and sells "complete" hospital information systems. As a part of this total package, it includes MacPhearson's scheduling module that can cost a hospital customer as much as $1MM. The smaller competitor, Patriot, was the first to enter the market and it has sold a little over 20 systems, with most of its sales in the mid-west of the US. Patriot charges around $250,000 per hospital for the system. Pricing is also becoming more competitive. Lately, Haywood has seen several of the larger competitors dramatically reduce the price of their scheduling modules when clients, in addition to the scheduling component, select their entire hospital information system. Some of the smaller competitors have also cut prices to increase sales.

Haywood sits at her desk and begins to reflect. "Can we have sustained success as a one-product company?" "If not, what additional products should we offer and what criteria should be used to prioritize resources?" Finally, she wonders, "what can we do to make sure our customers continue to do business with us?" She knows she has work to do to ensure Encompass Software successfully makes the transition from a startup to a sustained business venture.

INDUSTRY OVERVIEW

Scheduling is one of the most basic yet essential functions a health care organization performs. Within most health care facilities, however, various departments, physician groups, outpatient facilities and other clinics all schedule appointments separately, resulting in conflicts and inefficiencies. Although other industries, such as the manufacturing sector, have developed and used sophisticated enterprise-wide scheduling systems for decades, the first real scheduling systems began to appear in the health care

field during the 1980s, when staff shortages required more effective nurse workload management. Many early users soon began to adapt these systems to help predict staffing needs and adjust work force resources for skill-level mix and associated costs as patient volume and workloads changed. In today's complex health care environment, an enterprise-wide scheduling system allows health care organizations to better manage business and financial needs by providing timely and accurate information capture of patient services. The hospital market is diverse, with differing needs depending on the size (number of beds) of the facilities or the markets served.

Market Statistics

1. There are 5,724 hospitals in the U.S. (total market), according to the American Hospital Association.[iii]
2. Of these, 2,903 hospitals are nonprofit, and 1,025 are for-profit. Additionally, 1,045 are owned by state or local (county, hospital district) government entities.[iv]
3. Of all hospitals in the U.S., 1,984, or 35 percent, serve rural communities and are considered rural hospitals.[v]
4. Hospitals vary widely in size, from small rural facilities that provide limited services to large, multi-purpose facilities. The U.S. hospital market is broken down into the following four groups (by bed count), with each having different decision making and buying characteristics:[vi]

0-99 beds	2,557
100-299 beds	1,645
300-499 beds	540
500 beds or more	266

Within these hospitals, doctors contract with insurance companies, and generally, they can do business with any facility in a given service area.

What Should a Scheduling System Do?

Based on industry research and member feedback, the Voluntary Hospital Association (VHA), a volunteer member-based network, identified the following core features as being critical to a successful enterprise-wide scheduling system:

- The ability to schedule patients for multiple services across the health care organization from any location.
- Convenience in scheduling personnel, facilities, and equipment, thus helping to more efficiently use expensive resources.
- Access to current patient insurance and billing information.
- The ability to screen procedures for medical compliance before patient encounters, thereby reducing costly insurance denials and necessitating claims resubmissions.

- Real-time capability to estimate the cost of scheduling and staffing decisions and forecast staffing needs and budgets.

What Are the Benefits?

The VHA concluded an enterprise-wide scheduling system provides many key benefits:

- Telephone time required to schedule an appointment is reduced from ten minutes to four minutes.
- Up to a 50 percent increase in appointments starting on time.
- Rescheduling can be reduced by 85 percent and patient delays cut by 60 percent.
- Phone time can be reduced from 20 minutes to 5 minutes through the elimination of duplicative data collection.
- All resources required to deliver appropriate care are available at the right time and in the right place.
- The potential to reduce clinicians' administrative workload and focus clinical resources on delivering patient care.
- Proper staffing improves the overall quality of care while greatly reducing costs.

Ultimately, an enterprise-wide scheduling system streamlines access to patient care and information capture, improves profitability by providing timely and accurate tracking of services and expected reimbursement, reduces waste and inefficiency and ensures the appropriate use of expensive resources.

The Current Scheduling Environment

Overall, health care organizations spend $250BN annually on medical claims paperwork and $26BN annually on hospital "revenue cycle operations." Research shows insurance claim denial rates have risen, gross inpatient charges are down and gross days in accounts receivable are increasing. As a result, many health care organizations are correcting wasteful steps in the revenue cycle caused by incomplete or erroneous data that slows the reimbursement process.

Revenue cycle operations involve many steps including scheduling, registration, admissions, medical records, billing, and collections. Scheduling or patient access specifically refers to all processes required to identify and register a patient for treatment and services. It is the patient's first point of contact with the hospital, and the entry point of information into the revenue cycle. A main objective of the patient access phase is comprehensive data compilation to ensure a "clean" claim.

Health Care Organization Needs

VHA identified a reasonably strong need for enterprise scheduling solution within its membership. VHA's Strategic Sourcing Study shows that 17 percent of VHA hospitals outsource scheduling, with 15 percent likely to outsource over the next two years. The study of 324 respondents from 254 member organizations represents 11.5 percent of VHA's total membership. Information technology functions – such as

scheduling – make up the largest current segment of outsourced operations, with 13 percent of hospital technology budgets currently allocated to external vendor sourcing.

It is interesting to note VHA's research found few health care organizations have actually implemented scheduling enterprise-wide. Even in the most sophisticated facilities, implementation appears to be piecemeal. The results of a Gartner (an information technology research company) study validate these findings. According to Gartner, of the top applications that hospitals identified for acquisition or replacement in the next two years, enterprise-wide scheduling placed fourth among 35 percent of all providers surveyed.

The study also found that:

1. 21 percent of providers plan to add an enterprise-wide patient scheduling system.
2. 34 percent intend to purchase in the next 12 months, 37 percent in the next 12-24 months.
3. 61 percent of providers have an enterprise patient scheduling system. Of these only 38 percent had a fully implemented system; the remaining had a partial implementation.
4. 60 percent of respondents planned to implement a patient scheduling system throughout the enterprise. The remaining 40 percent planned to implement scheduling only in some function within the organization.
5. Nearly half (48 percent) of respondents stated that a full implementation of the enterprise patient scheduling system is 12 to 24 months away, while 22 percent indicated that full implementation was more than 24 months away.
6. 63 percent of the providers that are looking to add or replace their enterprise scheduling systems have not selected a vendor.

Purchasing Barriers

Significant barriers identified by VHA include:

1. Political issues. It is not uncommon for departments to view centralized scheduling as a loss of control due to political turf wars that make it difficult for organizations to eliminate unnecessary services.
2. Infrastructure barriers. Lack of automation is a major obstacle to enterprise-wide scheduling implementation. In fact, many hospitals have not been able to make the transition from paper-based processes to full automation.
3. Cost and capital funding challenges. Enterprise-wide implementation of a scheduling system can require a significant investment. Most providers are choosing to implement the application in a limited scope.

ENDNOTES

[i] Patient demographic information is used for billing purposes. Approximately 1out of 5 patient bills return due to incorrect address information. Insurance carriers typically deny payment for procedures due to lack of policy coverage or because "preauthorization" has not been obtained. Almost 2 out of 10 patients are "no shows" for hospital appointments.

ii   Complete hospital information systems include, in addition to scheduling, clinical functions, financial applications, and electronic medical records.

iii   American Hospital Association. "AHA Hospital Statistics."

iv   Centers for Disease Control and Prevention. "Table 116. Hospitals, beds, and occupancy rates, by type of ownership and size of hospital: United States." Available online at http://www.cdc.gov/nchs/data/hus/2011/116.pdf

v   Centers for Disease Control and Prevention. "Table 116. Hospitals, beds, and occupancy rates, by type of ownership and size of hospital: United States." Available online at http://www.cdc.gov/nchs/data/hus/2011/116.pdf

vi   Centers for Disease Control and Prevention. "Table 116. Hospitals, beds, and occupancy rates, by type of ownership and size of hospital: United States." Available online at http://www.cdc.gov/nchs/data/hus/2011/116.pdf

USING YELLOWDIG IN MARKETING COURSES: AN ANALYSIS OF INDIVIDUAL CONTRIBUTIONS AND SOCIAL INTERACTIONS IN ONLINE CLASSROOM COMMUNITIES AND THEIR IMPACT ON STUDENT LEARNING AND ENGAGEMENT

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ABSTRACT

Students in four marketing classes participated in a pilot program where they used Yellowdig in the classroom. Yellowdig is a private network for collaboration targeted towards educational institutions to increase student engagement. Yellowdig seeks to engage students using a broad array of resources including videos, news articles, blogs and more. It offers a Facebook-like experience (a platform the majority of students are very familiar with) for ease of use.

In the classes, Yellowdig was used for two purposes: as a way to create a community inside and outside of the classroom and as a means by which students create and share course-relevant content throughout the semester. To achieve those goals, students posted items of interest relating to course content to Yellowdig and commented on and up-voted others' posts. Yellowdig data was used to capture insights about students' individual contributions and social interactions.

The manuscript summarizes academic literature on social learning and social media, followed by a description of Yellowdig and how it was used in the marketing classes to benefit student learning and engagement. The results of quantitative analyses, including data visualization and social network analysis, are used to help educators understand both individual contributions to and social interactions in the network. In addition, multiple linear regression results suggest that engagement through Yellowdig activities does benefit student learning. Strategies for instructors to enhance student engagement and learning using these types of analyses are provided.

INTRODUCTION

The topic of *student learning and engagement* is a hot topic today in pedagogical circles at every level of education. But institutions of higher education, in particular, are working to improve student learning and engagement in an age of greater accountability from accrediting bodies, states providing decreased funding, and other constituencies questioning the activities and value of universities and colleges. New pedagogies are being explored, especially ones that utilize new technologies or platforms, such as Web 2.0 and social media platforms like social networking sites (e.g., Facebook), microblogging sites (e.g., Twitter), and blogging. The purpose of this research is to describe the implementation of a new digital learning platform, Yellowdig, in four marketing classes and report the results of data visualization, social network analysis, and multiple linear regression with respect to student learning and engagement. First, literature on social learning and social media as pedagogy is reviewed. Then, the methodology and results are reported. Finally, a

discussion and conclusions, with suggested strategies for enhancing learning and engagement, are presented.

SOCIAL LEARNING

Social learning, with its origins in Bandura (1977), is a paradigm in organizational/ workplace and educational settings that has received much attention lately with the emergence of social media platforms. But *social learning* is not the same as *social media*. Social learning is "learning with and from others by moving within one's culture, workplace, and world," while social media are "the tools that enable social learning to happen on a large scale" (Bozarth, 2012, p. 66).

Bingham and Conner (2015) referred to "the new social learning" to "describe the broader issues and opportunities now available" and stated that social learning is "modeling, observing, sharing, participating, and so much more" (Bingham & Conner, 2015, p. 14). In describing how social learning has impacted the organizational/workplace setting, Bingham and Conner (2015) wrote, "The 20th century was about leading with technology and tools. The 21st century is about leading into a connected world" (Bingham & Conner, 2015, p. 5).

The same is true for an educational context. The social learning model "focuses on developing activities that promote learner-to-learner interactions and the co-construction of knowledge through sharing information and resources" (Feldstein & Gower, 2015, p. 3). "The new social learning is not just the technology of social media, although it makes use of it. It is not merely the ability to express ourselves in a group of opt-in friends. The new social learning combines social media tools with a shift in organizational structure, a shift that encourages ongoing knowledge transfer and connects people in ways that make learning enjoyable" (Bingham & Conner, 2015, p. 8).

SOCIAL MEDIA AS PEDAGOGY

The use of social media in the classroom has increased dramatically in recent years, and researchers have attempted to gauge its impact on student learning and engagement. For example, Chen and Bryer (2012) suggested that using social media as learning tools might connect informal learning to the formal learning environment in the classroom, and wrote, "Social media technologies that allow students to connect to educational contexts in new and meaningful ways beyond the traditional classroom environment have the potential to blur the line between formal and informal learning" (Chen & Bryer, 2012, p. 89). In a qualitative study, Chen and Bryer (2012) found that university instructors believe informal learning using social media can be facilitated by instructors and integrated into formal learning environments, resulting in enriched discussions, increased engagement, and broad connections. Luo and Franklin (2015) found that students in a social media class at an institution of higher education were motivated to use social media in class and employed high degrees of self-discipline and self-exploration in using Twitter and blogs, especially advanced social media users versus novices. In a review of literature related to the use of social media in computing education, Wang and Meiselwitz (2015) found some evidence of improvement in learning and benefits to both students and faculty, such as improved social support and perceived interaction.

The research, however, is mixed when it comes to the impact of social media in education (see Mostafa, 2015; Neier & Zayer, 2015). Some research found negative impacts of using social media in the classroom, such as a negative relationship between social media usage and grade

point average (Bijaria, Javadiniab, Erfanianc, Abedinid, & Abassi, 2013; Junco, 2012; Kirschner & Karpinski, 2010). Wang and Meiselwitz (2015) report several concerns of students and faculty when using social media including, for example, security, privacy, and the difficulty of performance evaluation and monitoring. Bennett, Bishop, Dalgarno, Waycott, and Kennedy (2012), in a collective case study of six Web 2.0 implementations in Australian higher education, found that most students had little prior experience with the technologies used (digital photo archives, blogging, and wikis) and many did not see the value of these technologies for learning and teaching.

Despite the mixed findings regarding the impact of social media in education, the marketing discipline is embracing social media for two reasons. First, social media marketing, as a sub-discipline of marketing, is a rapidly emerging field in terms of careers and academic research. Second, marketing educators are increasingly exploring social media as a pedagogical tool and its potential to boost student learning and engagement. For example, the *Journal of Marketing Education* published a special issue focused on student engagement via digital and social media. As Crittenden and Crittenden (2015) wrote, "Student engagement with regard to social media in marketing classrooms is a critical component of learning in today's world of fast-paced, every-changing marketing practices." Authors in this special issue used social media platforms to enhance student engagement, including Facebook (Bal, Grewal, Mills, & Ottley, 2015; Northey, Bucic, Chylinski, & Govind, 2015), Twitter (West, Moore, and Barry, 2015), and blogging (Fowler & Thomas, 2015). Fowler and Thomas (2015) and Bal et al. (2015) implemented marketing projects in classes in which social media tools were the primary teaching tool. Consistent with social learning theory and the movement in marketing to embrace social media as a pedagogical tool, we piloted the use of Yellowdig in two marketing classes.

YELLOWDIG

Founded in 2014, Yellowdig is a collaborative, immersive digital learning platform that complements the traditional educational experience. The platform is a mix between a university social network and a course management tool, helping to establish knowledge communities, increasing students' knowledge of current affairs related to coursework, and encouraging course participation. Yellowdig feels like Facebook, so most students do not find it challenging; rather, the platform feels instantly familiar and natural to most students. Yellowdig allows students to share original or curated content, relevant links, photos or notes with their classmates on a feed, and classmates can up-vote ("like" or "love") and discuss ("comment" on) posts. Students can build their "influence" score by getting up-votes, posting on the platform, and gaining followers and instructor badges. A Leaderboard is displayed on the right side of a Yellowdig feed, and features the top seven contributors on a board at any given time (based on the point system enabled for the particular board). The Leaderboard provides an incentive for students to become a top contributor on a board by posting relevant content and participating through up-votes and comments. To help organize the content, students can assign a "topic(s)" (hashtag) to each pin. An example of a Yellowdig post ("pin") is found in Figure 1.

Figure 1
An Example of a Yellowdig Pin (Post)

Instructors can monitor student progress throughout the semester. Students accumulate points (as determined by the instructor) and the points are automatically transferred into a learning management system such as Blackboard. Yellowdig provides a dashboard that summarizes Yellowdig board activity for a specific time period and individual student activity reports (see Figures 2 and 3). In addition, summary, detailed, and weekly points reports can be downloaded by the instructor.

Figure 2
An Example of a Yellowdig Dashboard

Figure 3
An Example of a Yellowdig Student Summary
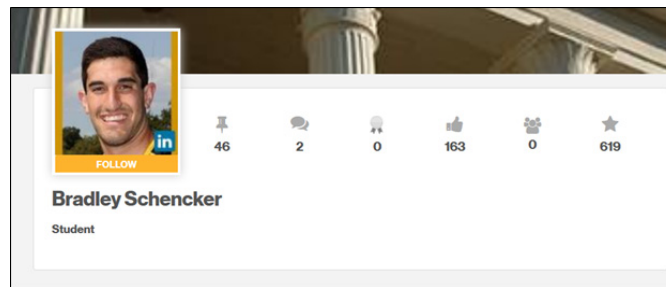
METHODOLOGY

The research question driving this study was, "To what extent will Yellowdig enhance and improve student engagement and their learning experiences?" In this study, two marketing courses – Social Media Marketing, Customer Service and Relationship Management – used Yellowdig throughout a semester. Each course is taught by a different instructor and each instructor has one face-to-face section and one online section. In the classes, Yellowdig was used for two purposes: as a way to create a community inside and outside of the classroom and as a means by which students create and share course-relevant content throughout the semester. Students were instructed to share course-relevant content by posting ("pinning") items of interest relating to the content being covered, as well as articles, videos, and other webpages related to their personal interests or experiences preparing activities and assignments in the class. Students accessed Yellowdig through Blackboard, the university's learning management system, or through the Yellowdig mobile app.

Students' Yellowdig activities were counted as part of their course grades. To earn full credit for the Yellowdig portion, students needed to earn at least 300 points over the course of the semester by adding pins and by commenting on and earning loves or likes from their peers. Specifically, grading was explained as follows:

Each pin of 40 words or more earns 10 points, each comment of 40 words or more earns 5 points, and earning a like or love earns 1 point, so to earn 300 these points you will need to earn, on average, 25 points on Yellowdig per week. For example, you could add a pin (10 points), make 2 comments (10 points), and earn 5 likes or loves (5 points) for a total of 25 points. Or you could comment on 4 pins (20 points) and earn 5 likes or loves (5 points). You can earn up to a maximum of 50 points a week, so please do not wait until the end of the semester to earn your points. Each week starts at 12:01 am CST Monday and ends at 11:55 pm CST Sunday.

Students were also asked to assign a "topic(s)" to each pin. Topics are like hashtags and are used to designate discussion of a pertinent topic. For example, some of the topics used in the Social Media Marketing course included #SocialMediaStats, #SMMCareers, #SMMResources, and #PersonalBranding.

Throughout the semester, the instructors minimized their digital footprints in the courses, purposely not up-voting or commenting on students' posts. We decided that we should let the students influence and determine the nature and direction of the conversations taking place on Yellowdig without instructor interference.

In both the face-to-face and online classes, Yellowdig allowed students to curate new, recently published content relevant to the course material. In a field like marketing, keeping up to date is extremely critical and much content in typical textbooks is already outdated. In the face-to-face (on-campus) classroom, we used Yellowdig to structure or supplement class discussions. Prior to meeting, the instructors would select one or more articles posted on Yellowdig. Then, in class, the instructors would ask a particular student who posted a particular article to summarize the article. Since other students had up-voted or commented on the article, the instructor would also ask for their opinion of the article. The incorporation of the Yellowdig content into class discussions held the students accountable for their individual-level and social activities, and allowed discussions to focus on interesting content relevant to the course.

In the online courses, Yellowdig allowed students to connect and engage in ways not possible with discussion boards through a typical learning management system. While students can comment on others' posts in a discussion board, the ability for students to up-vote and comment in Yellowdig and to gain a level of influence in the community (through up-votes and gaining followers), along with content being organized through topics (hashtags), brings individual-level contributions and social interactions to a higher level of engagement and social learning.

Data Analysis

Summary reports for the semester were generated and downloaded from Yellowdig, along with students' course grades, and used for quantitative data analysis. The data was imported into Tableau, a data visualization software (www.tableau.com), and Gephi, a social network analysis software (https://gephi.org/). The field of learning analytics guided the quantitative data analysis. Learning analytics, as defined by the Society for Learning Analytics Research, is "the measurement, collection, analysis and reporting of data about learners and their contexts, for purposes of understanding and optimizing learning and the environments in which it occurs" (Siemens & Gasevic, 2012, p. 1). Learning analytics as a field of study is in its infancy but, fueled by the availability of large amounts of data that can be gathered from learning management systems and Web 2.0 platforms, it is attracting the attention of educators and administrators alike. The *NMC Horizon Report: 2016 Higher Education Edition* currently projects the adoption timeline for learning analytics at one year or less, stating, "The goal is to build better pedagogies, empower active learning, target at-risk student populations, and assess factors affecting completion and student success" (Johnson, Adams Becker, Cummins, Estrada, Freeman, & Hall, 2016, p. 38).

To better understand this data, we need to make a distinction between various types of learner information that is available. A recent report by the Educause Learning Initiative (ELI) suggests three categories of learner information: "dispositional (e.g., incoming GPA, biographic and demographic data), course activity and engagement, (e.g., keystrokes, selections, time on task), and learner artifacts (e.g., essays, blog posts, media products)" (Brown, Dehoney, & Millichap, 2015, p. 6). Although useful, these categories place the focus on individual characteristics, actions, and outcomes.

This focus on individual characteristics, actions, and outcomes is not surprising. In educational settings, outcomes and summative assessment are often analyzed to determine a student's competence in a specific content area. One of the reasons we rely so heavily on summative assessment is the ease with which it can be accomplished. Exams, quizzes, and papers are, for the most part, discrete events that take a snapshot of what someone has learned. They can

be administered at a specifically scheduled time and the scope of the assessment is totally in the control of the instructor. Measuring outcomes, in this context, is a straightforward process.

Web 2.0 tools and platforms that allow for robust social interactions among students are relatively new and cannot necessarily be assessed in the same way we have learned to assess individual contributions. Shum and Ferguson (2012) define Social Learning Analytics as "a distinctive subset of learning analytics that draws on the substantial body of work demonstrating that new skills and ideas are not solely individual achievements, but are developed, carried forward, and passed on through interaction and collaboration" (Shum & Ferguson, 2012, p. 5).

The Yellowdig platform allowed assessment of *individual contributions* and *social interactions*, and both types are presented here. The Tableau data focuses on individual contributions and behaviors. We see how many pins, comments, or likes an individual has contributed to the learning community, and an example for one of the courses (Social Media Marketing online) is shown in Figure 4. While this is valuable, it does not tell the whole story. We may know how many times a student has up-voted someone else's contributions but it does not tell us who they up-voted, who up-voted their contributions, or what that particular behavior can tell us about the dynamics of the course. As we look to create more collaborative learning environments, these dynamics can help us identify a student's position in the learning community and give us an indication of the effectiveness of the community as a whole.

Figure 4
Tableau Course Analysis: Number of Pins Created, Likes, and Loves and Number of Videos and Articles Posted by Each Student in the Social Media Marketing Online (MKTG 610V) Course
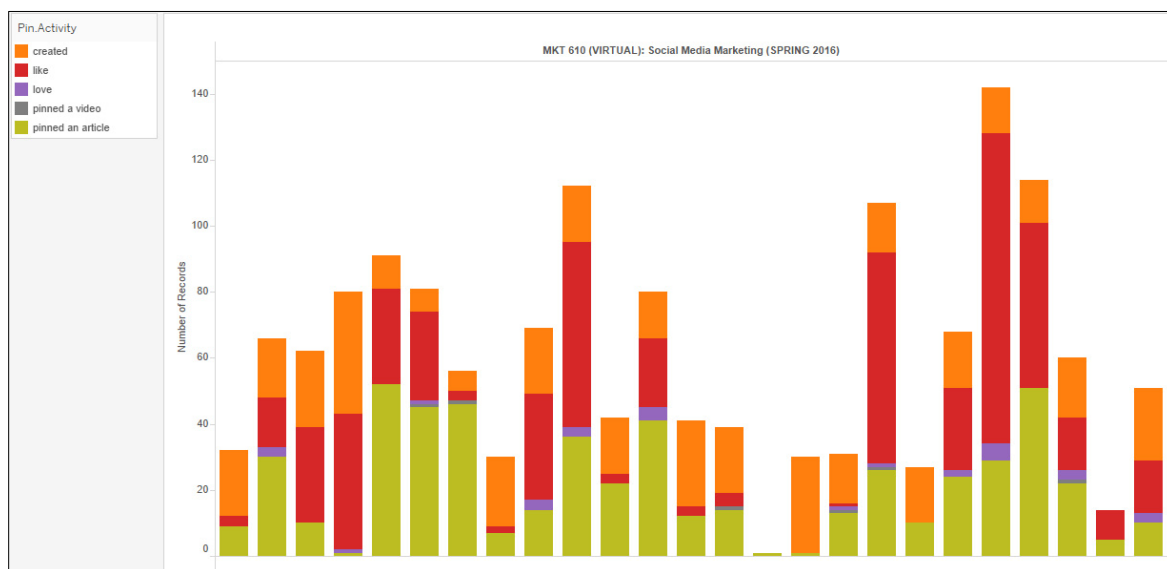
In this study, data was also analyzed with Social Network Analysis (SNA) in Gephi. Examples of SNA in education research include Feldstein and Gower (2015) who analyzed the network of comments exchanged by students in the knowledge-building blog deployed in an undergraduate brand management course. The authors found SNA provided an opportunity to gauge the communicative interactions that take place and to assess the relationship between the students' positions within the network, their communication and collaborative feedback skills, and course outcomes (Feldstein & Gower, 2015). In addition to data visualization and SNA, multiple

linear regression was used in this study to determine whether students' course grades could be predicted by their engagement using Yellowdig in the classes.

RESULTS

For the quantitative analysis, student course grades and data for all activities taking place on the Yellowdig platform were captured. Yellowdig identifies various activity categories. For instance, if a student creates a "pin," usually a content specific contribution designed for the entire class to see, a statement that "Student A 'created a pin' owned by Student A" is generated. This represents the type of information that is typically collected as individual student contributions to a course.

With Yellowdig, data on activity that is more social was also captured. The statement "Student A 'liked' a pin owned by Student B" indicates that Student A's action was directed specifically toward a contribution made by Student B. This type of activity serves as feedback for Student A and it also signals to the rest of the class that there is some interest in Student B's pin. For the purpose of this study, we looked specifically at the more "social" activity as a way to describe the social characteristics of the community of students enrolled in each of the courses examined.

The structure of each of the four course communities – Social Media Marketing face-to-face and online (MKTG 610 and MKTG 610V) and Customer Service and Relationship Management face-to-face and online (MKTG 603 and MKTG 603V) – was examined, and then the contributions of individuals within each community were assessed. Since all courses were offered in the same semester, some overlap of students was present. The face-to-face courses had four students in common. The online courses had five students in common. We compared and contrasted these student's activities in the two courses in which they participated. We also examined their place in the network community built around student interactions with one another. We also examined the role of the instructor in each community and benchmarked the activity of the overlapping students against the "most active" student in each course. Finally, we examined the students' grades in the courses and whether their class performance was related to their engagement in Yellowdig.

Community Structure

Table 1 examines community structure. The first column, *TTL Actions*, represents the total number of activities, including pins, comments, likes, follows, etc., that took place in each community. The online sections of each course had more activity than the corresponding face-to-face courses. By the same token, the number of *Social Actions* (comments and up-votes) and *% Social* (the number of social actions relative to total actions) is also much greater in the online courses than the face-to-face courses.

TABLE 1							
Community Structure							
Course	TTL Actions	Social Actions	% Social	Graph Density	Nodes	Edges	Average Degree	Modularity Class
MKTG603f2f	2031	288	14.18%	0.686	21	288	27.4	3
MKTG603V	2131	519	24.35%	0.558	31	519	33.4	3
MKTG610f2f	1308	177	13.53%	0.657	17	177	20.8	3
MKTG610V	1670	337	20.18%	0.611	24	337	28.0	2

Another network measure is *Graph Density*. Graph density measures how close the network is to being complete. A complete graph, one in which all students have connected with each other (i.e., all students in the network directed a comment to every other student in a class), has a density equal to 1. Although there does not seem to be a dramatic difference across communities, it is interesting that the face-to face sections of each course are denser than the online sections.

Average Degree, which is the average number of directed social actions (i.e., comments and up-votes) by members of each community, is higher in the online sections than in the face-to-face sections. In the face-to-face Customer Service and Relationship Management (MKTG 603) course, online interactions are 18 percent higher and in Social Media Marketing online (MKTG 610V), interactions are approximately 25 percent higher. *Nodes* represents the number of members in the community – students and an instructor in this particular study – that are connected by *Edges*, connections formed when a comment made by one student is directed to another.

Finally, we have calculated *Modularity Class*. The Modularity algorithm implemented in Gephi looks for nodes (students) that are more densely connected together than to the rest of the network **(**Blondel, Guillaume, & Lefebvre, 2008). A high modularity number indicates the presence of a number of sub-communities in a network. Members of a specific sub-community will typically interact with one another more than they will interact with members of the community at large. The algorithm has identified three sub-communities in three courses and two in the remaining course. Network Graphs for each course are presented in Figures 5-8. In all four network graphs, each modularity class is identified by the color of the corresponding nodes. Modularity class was examined more closely by looking at the students who were members of both courses (Social Media Marketing and Customer Service and Relationship Management).

Figure 5
Network Graph – Face-to-Face Customer Service and Relationship Management Class
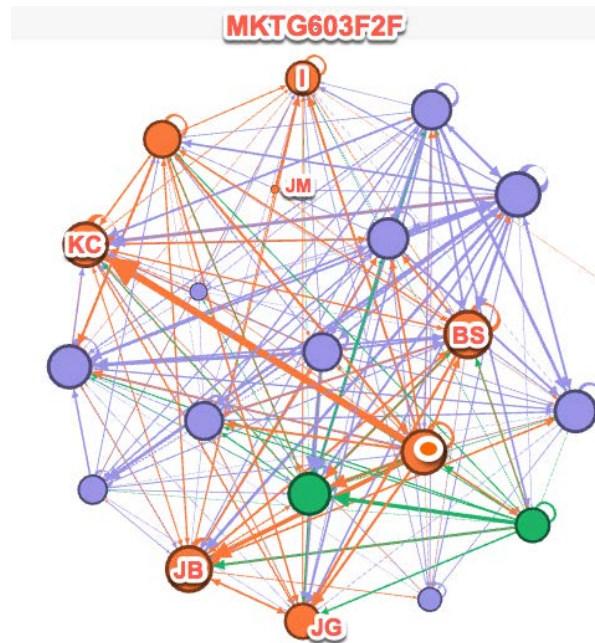
Figure 6
Network Graph – Face-to-Face Social Media Marketing Class
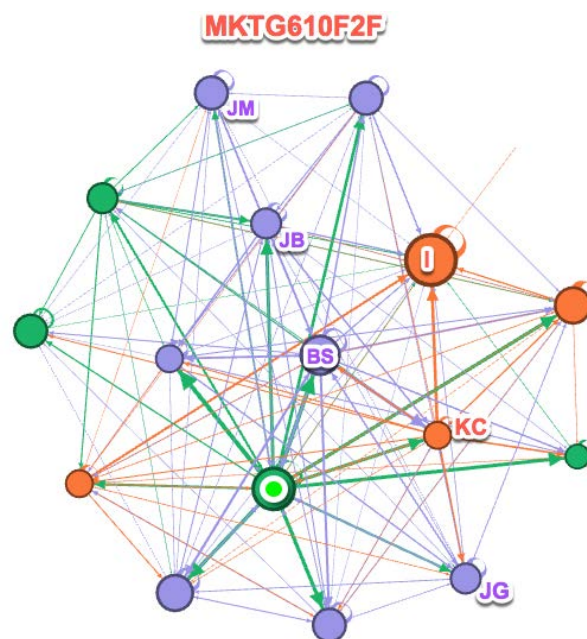
Figure 7
Network Graph – Virtual/Online Customer Service and Relationship Management Class
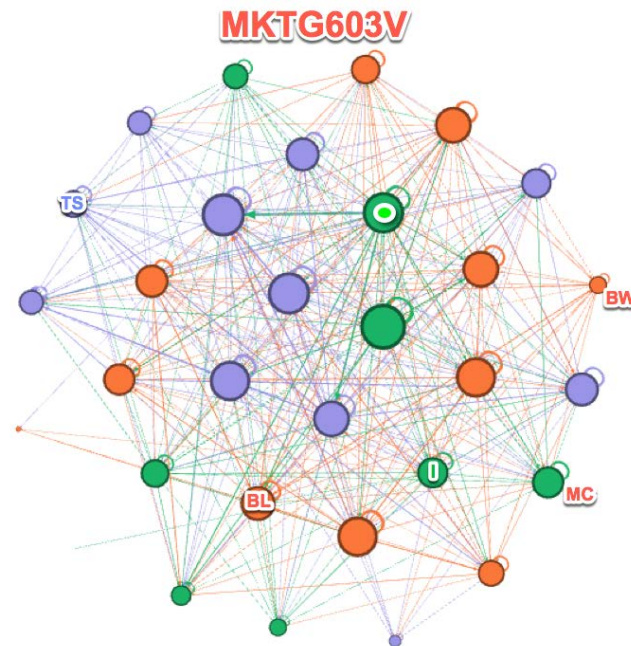
Figure 8
Network Graph – Virtual/Online Social Media Marketing Class
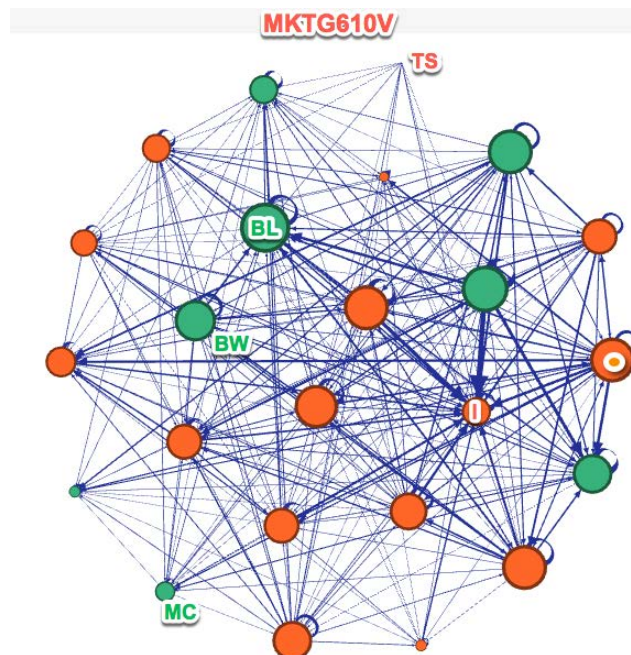
Individual Contributions

Table 2 reports specific variables in the network analysis for students who overlapped in the courses (i.e., were members of both the Social Media Marketing course and the Customer

Service and Relationship Management course, either face-to-face or online) and who were most active in each network. First, the table reports *Total Actions* for each student (TTL Actions) which includes social actions (comments and up-votes) and more traditional contributions (posts). Next, we measured *Out-Degree* which, in our course communities, is the number of times a community member has sent feedback directly to another student through comments and up-votes. Conversely, *In-Degree* is the number of times a community member has received direct feedback from another member of the course community through comments and up-votes.

Eigenvector Centrality is a measure of power and/or influence in a community. It represents not only the number of times a community member has received feedback, but also whether that feedback was or was not given by someone else who is receiving a large amount of in-degree connections. The closer a community member's score is to one, the more influence they have. *Modularity Class* in Table 2 identifies the sub-community to which each of our identified community members belongs.

TABLE 2 Individual Contributions: Instructors, Most Active Students, and Students Who Overlapped Communities						
Course	Id	TTL Actions	Out Degree	In Degree	Eigenvector Centrality	Modularity Class
MKTG610V	INST_mcm	32	2	24	1	0
Most Active	STUD_smc	144	23	12	0.519792487	0
	STUD_bal	66	18	20	0.837423055	1
	STUD_bnw	82	18	15	0.675437269	1
	STUD_mlc	32	12	9	0.383701963	1
	STUD_tls*	14	10	0	0	0
MKTG603V	INST_mjm	10	4	31	1	0
Most Active	STUD_mae	226	27	19	0.684100378	0
	STUD_bal	57	18	21	0.759609405	2
	STUD_mlc	41	15	21	0.723494971	0
	STUD_tls	36	16	15	0.489480856	1
	STUD_bnw	47	16	4	0.134130635	2
MKTG610f2f	INST_mcm	43	3	17	1	0
Most Active	STUD_ble	274	16	14	0.892515535	1
	STUD_bds	160	16	13	0.80155206	2
	STUD_jjm	49	7	11	0.679659799	2
	STUD_jeb	83	16	10	0.638985831	2
	STUD_jmg	66	12	10	0.608110951	2
	STUD_kac	106	15	9	0.576811134	0
MKTG603f2f	INST_mjm	15	6	21	1	2
Most Active	STUD_cms	210	18	17	0.896044002	2
	STUD_jeb	131	18	18	0.952437494	2
	STUD_bds	137	18	19	0.932695322	2
	STUD_kac	103	18	17	0.91444533	2
	STUD_jmg	68	12	16	0.85017816	2
	STUD_jjm	18	3	4	0.172768964	2

*This student (STUD_tls) dropped the course during the semester.

Instructors

In each course community, the instructors tried to create as small a footprint as possible. In all four communities, the instructors performed fewer total actions than anyone else in our sample group and directed less feedback to members of the class communities. However, this did

not deter students from directing feedback (comments and up-votes) to the instructors. In all four communities, the instructors received more in-degree actions than any other member of our community sample. The instructor eigenvector centrality score of one indicates that, despite efforts to maintain a low profile, instructors maintained their power and influence in course interactions.
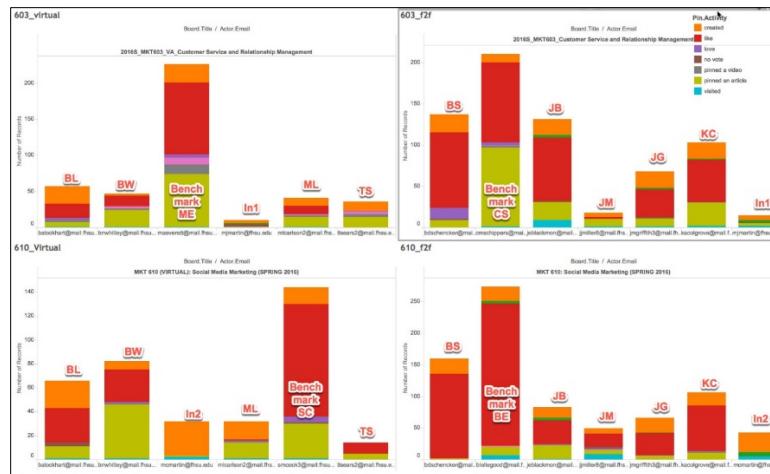
Most Active Student

In each community, we identified the one student who was most active (i.e., had the most total actions). We used this student's activity as a way to benchmark the activities of the other members of our sample communities. It is interesting to see that total actions does not automatically confer power and influence. All of our most active students had out-degree actions greater than or equal to the highest numbers in our sample. However, in three of our four course communities, the social actions of these high-activity students were reciprocated at a lower rate than the other students in the sample. If we compare eigenvector centrality scores, only one of these high-activity students had the highest score in their respective community. Finally, in three of our four communities, the student with the highest level of activity was in a different sub-community from most of our sample members.

Students Who Overlapped Courses

The four network graphs shown in Figures 5-8 provide visual representations of each course, allowing us to see where overlapping students are positioned in the networks. Each node represents a member of the community (student). The *color* of the node indicates the modularity class of that member. The *size* of the node indicates the relative number of comments made by a student; the larger the node, the greater the total in-degree and out-degree scores for that member. The directional lines linking each member represent connections between community members. The thicker links (edges) indicate that multiple connections have been made. Overlapping students have been annotated with two initials. The most active student in each network has a highlighted dot in the center of his/her node and the instructor is indicated with an "I." The Tableau graph shown in Figure 9 provides a visual representations of the overlapping students' Yellowdig activities in each course. While we represent only the *overlapping* students in Figures 5-9, all students in a course may be represented visually to identify easily their positions in the course, number of comments (both in-degree and out-degree), sub-communities, and links to other students.

Figure 9
Tableau Dashboard: Comparison of Overlapping Students in Each Course

Note: The "Benchmark" student in each graph is the most active
student on Yellowdig.

Relationship between Engagement and Learning

For all students in the four courses (n=88), we conducted multiple linear regression to explain the relationship between course grades (the dependent variable serving as a proxy for learning in this study) and the individual network measures of in-degree, out-degree, and eigenvector centrality (independent variables serving as proxies for engagement).

Before running the multiple linear regression, an analysis of standard residuals was carried out on the data to identify any outliers, which indicated that five students needed to be removed from the analysis. Tests to see if the data met the assumption of collinearity indicated that multicollinearity was not a concern (Eigenvector Centrality, Tolerance = .431, VIF = 2.318; In-Degree, Tolerance = .356, VIF = 2.811; Out-Degree, Tolerance = .730, VIF = 1.370). The data met the assumption of independent errors (Durbin-Watson value = 2.005). The histogram of standardized residuals indicated that the data contained approximately normally distributed errors, as did the normal P-P plot of standardized residuals, which showed points that were not completely on the line, but close. The scatterplot of standardized residuals showed that the data met the assumptions of homogeneity of variance and linearity. The data also met the assumption of non-zero variances (Course Grade, Variance = 60.965; Eigenvector Centrality, Variance = 0.036; In-Degree, Variance = 23.416; Out-Degree, Variance = 33.523).

A significant regression equation was found ($F(3,79) = 18.845$, p<.01), with an R^2 of .417. Students' predicted grade (in percentage) is equal to 69.777 + .646(Out-Degree). Out-Degree was a significant predictor; Eigenvector Centrality and In-Degree were not. Students' grades in the courses were predicted by their out-degree score, which is the number of times a student has sent feedback directly to another student (i.e., commented on or up-voted another student's post), indicating that engagement (out-degree) is a predictor of learning (course grade).

DISCUSSION

Consistent with the paradigm of social learning, a new social media platform designed for use in higher education, Yellowdig, was piloted in four marketing classes (two face-to-face and

two online). Data visualization and social network analyses were conducted to better understand social interactions taking place within a course, as well as individual student contributions to the classroom community. Multiple linear regression was used to determine whether students' course grades (learning) can be predicted by their engagement in a course. We believe that analyses at both levels – social interactions and individual student contributions – are important to understanding and making social learning more effective.

Rather than traditional *summative* assessment, whereby student learning is evaluated at the end of an instructional unit by comparing it against some standard or benchmark (e.g., a final paper or project), Yellowdig allows instructors to conduct *formative* assessment. As Feldstein and Gower (2015) wrote, "Using learning analytics to assess digital social learning platforms allow us to shift our focus from summative assessments of individual performance to visible, and in some cases actionable, behaviors and patterns at the individual and collaborative levels in the learning environment" (Feldstein & Gower, 2015, p. 6). With formative assessment, student learning and engagement are monitored to provide ongoing feedback to students. Visualization and social network analysis of Yellowdig data can help instructors identify students who need to improve their Yellowdig engagement (with pins and comments) and performance (by earning up-votes, instructor badges, and a place on the leaderboard) and then provide explicit coaching of students and/or implicit feedback through class discussions (e.g., recognition of students on the leaderboard or who have received instructor badges).

Social Interactions

Social interactions in the courses were assessed by calculating, for each class community, total actions, social actions, % social, graph density, average degree, and modularity class. We observed more *total actions* in the MKTG 603 Customer Service and Relationship Management classes, perhaps partly due to a greater number of nodes (students and an instructor) in the courses (21 and 31 versus 17 and 24 in the MKTG 610 classes). We also observed the number of *social actions* (comments and up-votes) and percent of total actions for all classes; *% social* ranged from 13.53% to 20.18%, meaning that the majority of actions by students was posting. This is not surprising given that a larger number of points may be earned by posting (versus commenting or up-voting).

We observed a *graph density* less than one for all four courses, which is not surprising as we would not expect all students to have directed a comment to every other student in a class, and that the face-to-face sections of each course are denser than the online sections. Perhaps the fact that the students actually meet physically in the face-to-face classroom encourages graph density.

We observed an *average degree* (the average number of directed social actions, including comments and up-votes) ranging from 20.8 to 33.4 across the four courses, with a higher average degree in the online classes (33.4 and 28 versus 20.8 and 27.4). Interestingly, students in the online classes comment and up-vote more, but do not connect to as many students within a class (graph density). Finally, by calculating *modularity class* for all four classes, we identified three sub-communities in three courses (MKTG 603 face-to-face and online; MKTG 610 face-to-face) and two in the remaining course (MKTG 610 online).

As instructors, a high level of graph density (closer to one) is desirable (more students directing more comments to every other student in the network) as this indicates an overall higher level of engagement in a class, with individual students who are highly engaged and connected to each other. Posting, a form of co-creation of content, is important as students experience the benefits of social learning. Encouraging all students, not just a few, to post content will result in

higher total actions. The number of social actions relative to total actions and average degree are also important. Instructors should encourage students to comment on and up-vote other students' posts. Comments require effort on the part of a student. They must read the article and then compose a meaningful comment in their own words, and a good comment may attract comments from other students. The Yellowdig point system encourages high quality comments as instructors can revoke a student's points if he/she believes a comment is not relevant, well thought-out, or does not contribute meaningfully to the Yellowdig board. Further, by assessing modularity class, instructors can identify sub-communities within a particular class and encourage, either explicitly or implicitly, for students to interact with all other students in the class, rather than with just those in a sub-community.

Individual Contributions to the Classroom Communities and Impact on Learning

In this study, the instructors purposely minimized their footprints in the courses (i.e., did not up-vote or comment on students' posts or award Instructor Badges which would have awarded points to students), but they were still influential. We observed that the instructors performed fewer total actions than students and directed less feedback (comments and up-votes) to members of the class communities. However, this did not deter students from directing feedback (comments and up-votes) to the instructors; instructors' eigenvector centrality scores were one, indicating that, despite efforts to maintain a low profile, instructors maintained their power and influence in the class communities. Instructors should strive to be influential in the class communities, but monitor their footprints to determine the extent of (through eigenvector centrality scores) and sources of influence (through number of posts, comments, up-votes, etc. reflected in total actions, out-degree, and in-degree).

Instructors should also monitor individual student contributions to the class communities. In this study, individual contributions were assessed by calculating students' total actions, out-degree, in-degree, eigenvector centrality, and modularity class in each class community. Using students who overlapped courses, we demonstrated visual representations of each course to see where overlapping students are positioned in the networks. By studying a network graph, we can identify nodes (students), their memberships in sub-communities (by node color), their number of comments (by node size), and connections to other students (edges).

In this study, we identified high-activity students and powerful, influential students, though these are not necessarily the same students. We benchmarked students' activities against the most active student in each class and found that the most active student had out-degree actions greater than or equal to others in the classroom community. However, in three of our four class communities, the social actions of these high-activity students were reciprocated at a lower rate than the other students in the sample. Further, only one of these high-activity students had the highest influence score in their respective classroom community (as indicated by eigenvector centrality scores).

We conducted multiple linear regression to determine whether student learning can be predicted by their engagement in the class communities. The results of the analysis indicated that out-degree (the number of times a community member has sent feedback directly to another student through comments and up-votes) is a significant predictor of course grades. We believe that a student's course grade was impacted because commenting on other students' posts requires thought and effort into articles being posted on Yellowdig. Students with higher grades read and commented on more articles throughout the semester which complimented the content they were learning in other aspects of the course.

Based on an analysis of their own footprint and individual student contributions to a class community, instructors can work to strategically manipulate a social network to enhance students' engagement and social learning. High-activity and influential students should be recognized by the instructor, and the instructor should encourage others to emulate their behaviors in Yellowdig. Instructors can reward students for meaningful, relevant contributions and good social behavior through comments, up-voting, and instructor badges, and recognize high performers by monitoring and commenting on the leaderboard. In turn, students' confidence and the social learning occurring in the class community will likely be boosted as the health of the network increases.

Conclusions

Social learning is important in today's world and an essential part of our students' lives, both inside and outside the traditional face-to-face and online classrooms. Through social learning, students can develop critical thinking, oral and written communication skills, and collaboration skills such as giving and receiving feedback (Feldstein & Gower, 2015). In the marketing classroom, in particular, social learning and the use of social media platforms like Yellowdig can be powerful. Yellowdig can engage students in course content and help marketing majors become more adept at using social media, a skill many will need as the market for graduates with social media marketing experience continues to grow. It also offers a way for students to integrate theory and practice as they participate in more traditional classroom activities (textbook reading, tests, projects) and, at the same time, compliment that effort with social learning in the form of co-creation and sharing of content on Yellowdig. Researchers found measurable increases in student engagement and learning outcomes when faculty and students co-created content on a social platform (Mandviwalla, Schuff, Chacko, & Miller, 2013). When students are seeking new and interesting content on a daily basis and bringing it to the classroom with their own take on it, that integration between theory and practice comes alive and students become more active learners by taking more responsibility for their learning.

Dabbagh and Kitsantas (2012) discuss social media in higher education in the context of Personal Learning Environments (PLEs). PLEs are "the tools, communities, and services that constitute the individual educational platforms learners use to direct their own learning and pursue educational goals (EDUCAUSE Learning Initiative, 2009, p. 1). Dabbagh and Kitsantas (2012) developed a pedagogical framework for social media use and present ways in which specific social media platforms can be used across three levels of interactivity (personal information management, social interaction and collaboration, and information aggregation and management). Consistent with this pedagogical framework, Yellowdig allows student interaction at all three levels of personal information management, social interaction and collaboration, and information aggregation and management (Dabbagh & Kitsantas, 2012) and can bridge the gap and integrate formal and informal learning (Chen and Bryer, 2012; Dabbagh & Kitsantas, 2012).

This research provides several contributions to the marketing pedagogy literature. First, we describe the implementation of Yellowdig, a new social media platform designed for use in higher education with the goal of enhancing student engagement and learning. Second, we demonstrate how Yellowdig data can be analyzed visually and with social network analysis to understand social interactions and individual student contributions to a classroom community. Third, we provide evidence using multiple linear regression that student learning is predicted by engagement in a course through Yellowdig activities. Finally, we offer educators strategies and suggestions for analyzing and manipulating strategically a classroom community to enhance the health of the overall social network and to increase and improve individual students' social behaviors and

contributions. In the end, we believe social learning through social media platforms like Yellowdig will enhance instructor and student experiences and, ultimately, student engagement and learning.

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DEVELOPING SOFT SKILLS THROUGH MULTIDISCIPLINARY COOPERATIVE AND SITUATED LEARNING

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ABSTRACT

Many studies indicate that hard skills are not enough to keep individuals employed, and that an increased emphasis on soft skills is required as a complement to hard skills. The current study examines a multidisciplinary cooperative and situated learning (MCSL) construct that may enhance student acquisition of soft skills through a more social application of their specific discipline knowledge. A semi-structured survey was conducted using 33 U.S. college students who participated in the learning process. Data were analyzed by descriptive statistics and ANOVA. Results showed that students were able (1) to apply discipline knowledge in the assigned activities, (2) to gain advanced knowledge from practical performance, and (3) to develop soft skills through the MCSL. The top five most developed soft skills from the learning experience were creative and critical thinking, verbal communication, time management, interpersonal communication skills, and learning to give and receive constructive criticism. This study may provide useful insights for educators in developing curriculums that meet the needs of the various industries relying on college graduates with specialized knowledge and soft skills to fill positions in their workplaces.

Keywords: soft skills, situated learning, multidisciplinary learning, cooperative learning, pedagogy

INTRODUCTION

Hard skills, technical skills, and STEM skills (Science, Technology, Engineering, and Math) are often used interchangeably as occupational knowledge, tools, or techniques that are necessary for various professions. For example, the ability to use software programs, foreign languages, analyzing data, operating specific tools and certified in professional field are considered as hard skills. The most desired hard skills in 2014 reported by LinkedIn include statistical analysis and data mining, algorithm design, computer graphics and animation, and economics (Murthy, 2014). Tech-related skills made the majority of their list of 'Who's getting hired and what are they doing?' However, many workplaces show that hard skills are not enough to keep individuals employed (James & James, 2004; Kimmons & Spruiell, 2005), but soft skills receive increasing attention because it is acknowledged that soft skills complement hard skills. Indeed, Arnold-Smeets (2015) stated that "While hard skills may get your foot in the door, soft skills will keep you there."

Soft skills refer to "the cluster of personality traits, social graces, facility with language, personal habits, friendliness, and optimism that mark each individual to varying degrees" (Soft skills', 2002). Goleman (1995, 1998) emphasized the importance of emotional intelligence and

corroborated that soft skills were the key to success for both companies and employees. Robles (2012) identified the top 10 soft skills perceived the most important by business executives as integrity, communication, courtesy, responsibility, social skills, positive attitude, professionalism, flexibility, teamwork, and work ethic. The importance of soft skills was also reported by the National Careers Service with a similar list of soft skills that employers wanted (What are the 'soft skills', 2012). No matter what the degree says or the major studied in school, candidates must have five soft skills: ability to work in a team structure; ability to make decisions and solve problems; ability to communicate verbally with people inside and outside an organization; ability to plan, organize, and prioritize work; and ability to obtain and process information (Adams, 2014).

According to a recent article in *Time* online, reasons for low employment rates among college graduates include a lack of soft skills (White, 2013). Several employer surveys (e.g., Workforce Solutions Group, Adecco) reported that areas of greatest gap were motivation, interpersonal communication skills, critical thinking, creative problem solving, appearance, punctuality and flexibility, and collaboration (Talent shortage survey, 2013). Internships may decrease these problems, and many universities and colleges encourage internships to help develop soft skills. Through various internship programs, students are prepared with generic skills such as communication, quantitative analysis, information technology skills, problem-solving skills, and ability to work with other people (Dickerson & Green, 2004). However, only 8% of student respondents considered internships a worthwhile pursuit (Bridge that gap, 2013). Therefore, it has become critical that the curricular body of knowledge expands at the college level in order to develop student ability in communicating and working with teams, authority figures and diverse groups, as well as prioritizing and organizing work, developing critical thinking skills and practicing creative problem solving through collaboration.

The key difference between hard and soft skills is that hard skills are specific and teachable, while soft skills are ambiguous and hard to measure (Mullen, 1997). However, educators have attempted to improve college students' soft skills through courses, projects and assignments (e.g., Bajada & Trayler, 2013; Lam & Adams, 2014). Alam, Gale, Brown, and Khan (2010) indicated the importance of human skills and reported a case study within the context of university curriculum. Alam et al. found that by increasing students' knowledge and understanding, students are better able to employ their soft skills and complete tasks more effectively. The authors concluded that training for soft skill development and education are considered valuable by the organizations.

The current study proposes a learning environment that may enhance student acquisition of soft skills through a more social application of their specific discipline knowledge. *Objectives of the study* were to increase (1) student application of current discipline knowledge in the assigned activities, (2) student gains in advanced knowledge through practical performance, and (3) student development of soft skills through a multidisciplinary cooperative and situated learning (MCSL) environment. This study employed the proposed learning environment at a Midwestern university in the U.S., where a fashion design and merchandising program (three specializations: fashion design, fashion merchandising, fashion styling) and an interior design program are offered to undergraduate students seeking bachelor's degrees in the respective programs. One of the most important aspects of the industries of fashion and interior design is the ability to work effectively and collaboratively in groups or on teams with other professionals. The proposed learning environment was designed to deliver simulated 'real world' work situations for students in these fields. This study may provide useful insights for educators in developing curriculums that meet

the needs of the various industries relying on college graduates with specialized knowledge and soft skills to fill positions in their workplaces.

LITERATURE REVIEW

Cooperative Learning

Collaborative learning is a widely used concept in college classrooms today, and brings students together as a group to maximize their own and each other's learning experience (Hamilton, 1997). Collaborative learning and cooperative learning are very similar teaching methods, and cooperative learning is often described as a type of collaborative learning (Millis & Cottell, 1998). Cooperative learning refers to "an approach to group work that minimizes the occurrence of those unpleasant situations and maximizes the learning and satisfaction that result from working on a high-performance team" (Felder & Brent, 2007). In cooperative learning, students work together in small groups on a structured activity, and each student contributes to reach a common goal as individually accountable for the assigned work (Ormrod, 2008). Students may understand their strength and weakness, develop interpersonal skills, and learn to deal with conflicts and problems. With clear objectives, students engage in numerous activities in cooperative groups that improve their understanding of subjects explored. Johnson, Johnson, and Smith (1991) indicated the success of cooperative learning requires (a) interdependence to achieve a common goal, (b) interaction to help others learn, (c) individual and group accountability for assigned specific responsibilities, (d) interpersonal skills to make decisions, resolve conflicts and effectively communicate, and (e) group processing to reflect on their experience.

Kim, LaFleur and Schaeffer (2008) used a cooperative project among fashion merchandising students and found that students had an appreciation of the importance of across course connections and did understand the importance of being able to apply what was learned in the project to a professional work experience. Similar findings were reported by Karpova, Jacobs, Lee and Andrew (2011) in a study using virtual reality technology and apparel students. Results showed that students believed they improved their personal development skills as a result of cooperative learning experience. Based on the previous research, cooperative learning helps students acquire knowledge and soft skills.

Multidisciplinary Learning

Cooperative learning is often applied in a multidisciplinary (or interdisciplinary) learning environment because it helps achieve the goals comprised from diverse disciplines. Multidisciplinary learning refers to a learning environment that combines various disciplines (Garner, 1995). Educators have developed courses including more than one discipline so that students are able to work within discipline specific parameters and benefit from others' expertise in meeting a common goal. Students across different subject areas are placed in groups and are encouraged to make connections in their learning. The importance of multidisciplinary learning has been addressed and facilitated in curriculum development. Students learn how to work together in groups to share their knowledge, expertise, and experiences from different disciplinary perspectives; this has been identified as a priority in higher education (Noroozi, et al., 2013).

Kimmons and Spruiell (2005) investigated the use of problem-based learning in developing a retail business as a multidisciplinary project. Results showed that students from three disciplines (interior design, retail merchandising, and graphic arts) perceived their team building skills and

problem-solving skills improved. In addition, students realized the importance of written communication skills and professional work behavior skills. Another study of a multidisciplinary project comprised of business, merchandising, and interior design by Chung and Meneely (2012) indicated the significant impacts of social skills (e.g., maturity, attitude, responsibility, commitment) and the ability to resolve interpersonal conflict on team creativity and success. Based on the previous research, multidisciplinary learning is also found to provide an effective learning environment to increase student knowledge and soft skills.

Situated Learning

Situated learning is a teaching practice described by Brown, Collins and Duguid (1989), who were the first to create a model of instruction with implications for classroom practice (Herrington & Oliver, 1995). Lave and Wenger (1991) further expanded the definition of situated learning and indicated the theory as a pervasive embodied activity that involved the acquisition, maintenance, and transformation of knowledge through processes of social interaction. Situated learning theory argues that acquisition of objective knowledge is best achieved as the accomplishment of knowing in action through everyday practice in organizational and other social settings (Handley, Clark, Fincham & Sturdy, 2007). According to the theory, situated learning allows students (a) to apply cognitive and conceptual knowledge acquired from conventional class settings in organizational and social settings, and (b) to achieve integrated knowledge and more realistic experiences through activities and interaction that are organized within work places.

Stein (1998) explains the elements of situated learning as (a) the integration of content–the application of knowledge, (b) context–building the instructional environment or setting, (c) community–the setting for the social interaction between participants, and (d) participation– active engagement of learners to exchange ideas and solve problems. Successful situated learning occurs in an "authentic social context" that is beneficial to the student learner and increases their knowledge that may be applied by the student in new situations and formats (Lankard, 1995, p. 3). Situated learning emphasizes the importance of creating 'real world' experiences to enhance student learning including social interaction. Lave (1991) contends that "learning is recognized as a social phenomenon constituted in the experienced, lived-in world, through legitimate peripheral participation in ongoing social practice" and , through membership in a "community of practitioners", learning can be enhanced and even mastered (p. 64).

Situated learning is often accomplished with multidisciplinary learning (Young, 2010). In a study by Wojahn et al. (2001), a technical communication program built partnerships with programs in mechanical engineering and industrial engineering to provide experience similar to situations students might face outside of school through a client-based design course. The authors noted significant growth in students' abilities to discuss design, teamwork, and client projects. The concept of situated learning was also applied in apparel studies. Byun, Kim, and Duffy (2012) examined multidimensional learning outcomes for merchandising and interior design majors. Students were given a scenario in which groups of students role-played as a business consultant, a lighting specialist, or a visual merchandiser working for a global luxury brand. Results indicated that the learning outcomes significantly influenced students' social/cognitive and emotional learning and attitude. Social skills are needed to work effectively in a community of practitioners; therefore, situated learning experience is an important part of the development of social skills. Based on the previous research, projects structured as situated learning give students the opportunity to achieve advanced knowledge and improve soft skills.

Development of Multidisciplinary Cooperative and Situated Learning Environment

Multidisciplinary Cooperative Learning: Four Disciplines

In recognition of the need for enhancing application of knowledge and developing students' soft skills, a semester-long series of five sequential projects were developed. The projects required cooperative work and employed a learning environment for the students in four disciplines in order to reach specific professional goals within each project. Because the proposed learning environment was not set as a conventional course, instructors agreed on a general time line for all joint-class meetings and the completion of projects.

The fashion design specialization teaches how to observe and analyze clothing styles, develop new ideas, and interpret them through fashion illustration, clothing construction, pattern making, and draping. Fashion design students who participated in the projects were juniors and seniors who had satisfactorily completed core fashion design courses and basic art and design courses. Fashion design students were equipped to work successfully in apparel design, line development and sample construction using the draping technique and skills learned in previous courses.

The fashion merchandising specialization teaches students who are interested in the business-oriented fashion industry. Students study fashion merchandising, personnel issues, fashion mathematics, and other business related courses. Fashion merchandising students involved in the projects were seniors who had successfully completed various courses such as consumer behavior, marketing, management, and accounting. Fashion merchandising students had background knowledge in target market research, product development, retailing, and promotion in the fashion industry.

The fashion styling specialization focuses on professional practices necessary to be successful as a fashion stylist. Fashion stylist students learn basic elements of fashion, client-based styling, event planning, and other supporting courses such as photography and journalism. Fashion stylist students who worked together in the projects were juniors who had completed core courses and who were experienced with different types of styling for professional practice. Fashion stylist students had creative vision and ability in presenting apparel products the best aesthetical way with the specific purpose of visual promotion.

The interior design major involves the application of technical and creative solutions with the aim of generating a built interior space that is functionally and aesthetically appropriate. Interior design students learn the elements of the design process including programming, schematic design, design development, and construction documents. Interior design students who participated in the project were juniors who had the ability to create retail environments using knowledge and skills such as drawing, presentation, furniture design, materials, sustainable design and energy conserving/producing systems, lighting, acoustics, and mechanical systems.

In this multidisciplinary cooperative learning setting, small groups were formed and each group included students from the four disciplines. Then, students were introduced to a situated learning environment.

Situated Learning: Developing Fashion Brands

A hypothetical scenario was given in which students were challenged to create fashion brands of apparel companies though five sequential projects in 16 weeks. Each project was

designed to provide the basic guidelines for students from market research to future plan. During the project periods, instructors introduced new discipline knowledge and skills that pertain to the course students were enrolled in. Every decision that students made to complete each project was based on research and group discussion. Groups representing different fashion brands were formed with students from the four disciplines, and students from the corresponding disciplines were asked to use their own project work in a cooperative effort in order to incorporate their discipline expertise in developing fashion brands. Students held official and unofficial meetings to communicate ideas and goals. Completing each project successfully required the fundamental understanding and responsibility that students are expected to carry in their future professional careers. The results of each project were presented formally as written reports, visual boards, sample garments, and oral presentations. Instructors from each discipline supervised student activities and evaluated their performances.

Projects and Flow

Project 1 Market research. In the first project, environmental scanning was performed by fashion merchandising students to understand the consumer market, current issues in fashion industry, and external environment of fashion brand. Fashion merchandising students in each group cooperated to research information related to global issues in social, economic, geographic, and technological changes, trend areas for consumer market and product categories, as well as popular cultures. In order to research current issues in fashion industry, different theme was applied each year to review in-depth (e.g., sustainability). Results of Project 1 were presented and shared among fashion merchandising students in different groups. Students were able to learn more about consumers and external environment in fashion industry from other groups' research.

Project 2 Target market research and branding. Based on the environmental scanning, fashion merchandising students made an initial plan of developing fashion brands: the type of target market, the type of fashion brand, the type of products, the price range of products, and the brand image. Students were advised to create unique, but realistic plans for their brands. Then, students recruited potential customers of their brands to conduct focus group interviews and learned specific target market needs and preferences. Based on the results of target market research, fashion merchandising students created fashion brands. Project 2 was presented to all instructors and students, including fashion design, fashion styling, and interior design students. This presentation was the first official meeting that started the process of MCSL among the students from all disciplines. Students began discussions to clearly understand the characteristics of target market and the uniqueness of each brand. Various techniques were used for effective and efficient communication that worked best for each group. For example, group chatting rooms on social media were created to exchange ideas and send electronic files.

Project 3 Product development. Based on the target market research and branding, fashion design and merchandising students started brainstorming for the direction of product development. As a group, a seasonal line of each fashion brand was developed. Fashion merchandising students made trend reports and shared the results with fashion design students. Then, students selected the fashion trends that best fit their target market's preferences and the characteristics of their brands. Selected fashion trends and target market's preferred product attributes were considered in item design, line development, specifications development using ASTM standards, materials sourcing, and creation of sample garment. Every step in product development was discussed and approved

to proceed by all fashion design and merchandising students as well as instructors. Project 3 was presented with Project 4.

Project 4 Costing, pricing, and production sourcing. After product development, fashion design students started the sample production, and fashion merchandising students began Project 4. Based on the line development, fashion merchandising students researched potential contractors for production sourcing. After selecting the best manufacturing contractors for their lines, fashion merchandising students developed initial assortment plans including product category, classes, subclasses, stock level, unit quantity, unit cost, and unit price. Projects 3 and 4 were combined and presented to all students. Students were able to understand the characteristics of their brands more clearly as specific outcomes were provided.

Project 5 Retailing, retail environment and promotion. After the Project 2 presentation, cooperative work in creating a retail store for each fashion brand began between fashion merchandising and interior design students. Target market research revealed preferences for elements and attributes of the retail environment as well as brand images of each fashion brand. Based on the results, interior design students created flagship stores. Fashion merchandising students and interior design students exchanged the ideas about ambience, space and components including layouts, type of fixtures, use of colors, lighting, and materials. Preliminary and final presentations were given by interior design students, and the final version of flagship store design was selected.

Upon the completion of Project 3 and 4, fashion styling students began brainstorming the direction of visual promotions. Based on discussions with fashion design and merchandising students, fashion styling students created advertisement and lookbook focusing on brand image, visual information of product, and styling for the fitting model in sample garments. Fashion merchandising students developed marketing and retail strategies including distribution channels, customer communication programs, promotional plans, and brand outlook. Results of Project 5 were presented by interior design, fashion styling, and fashion merchandising students. All students participated in the showcase of their fashion brands. Fashion merchandising students compiled all previous projects and gave a final presentation, the investor presentation.

METHOD

Study Design and Measure

In order to test the effectiveness of MCSL in improving students' knowledge and soft skills, a semi-structured survey design was developed. Measures related to Objective 1 (i.e., application of current discipline knowledge in assigned activities) were adapted from the Instructor and Course Evaluation (ICE) form developed at a Midwestern university in the U.S. (e.g., "During the projects with students from other disciplines, I was able to learn to apply current and previous course materials in completing the assigned tasks."). Respondents indicated their agreement with each item in the 4-item scale by writing a response alternative on a scale of 1 = strongly disagree to 7 = strongly agree. Questions related to Objective 2 (i.e., gains in advanced knowledge though practical performance) were also adapted from the ICE (e.g., "During the projects with students from other disciplines, I was able to learn how professionals in my field gain new knowledge."). Respondents answered each item in the 6-item scale by writing a response on a scale of 1 = strongly disagree to 7 = strongly agree. Objective 3 (i.e., development of soft skills) was measured using a 15-item scale adapted from the studies by Shuayto (2012) and Bailey and Mitchell (2006/2007)

(e.g., "The project with students from other disciplines helped me to develop interpersonal skills in communicating and interacting with other people, both individually and in groups."). Respondents indicated their agreements on a scale of 1 = strongly disagree to 7 = strongly agree. Additional questions in the form of constructed phrases and open-ended short essay questions were developed by authors to collect the individual respondents' experiences of MCSL (e.g., "Did the experience provide any new insight into the function of cooperative and/or collaborative work process?").

Data Collection and Analyses

A semi-structured survey was conducted after all projects were completed. Respondents were 33 students in four groups who participated in the proposed learning: Fashion merchandising (N = 16), interior design (N = 8), fashion design (N = 5), fashion styling (N = 4). Descriptive statistics were used to report means and standard deviations. Reliability was assessed using Cronbach's α, measuring the internal consistency of the items within each construct (e.g., a reliability of 4-item scale measuring application of discipline knowledge). Confirmatory factor analysis (CFA) investigates the construct validity of hypothesis-based testing instruments and adds a level of statistical precision. Thus, CFA was used to verify the validity of the measures for each construct (e.g., a degree to which 4-item scale measures application of discipline knowledge). Data were analyzed using ANOVA.

RESULTS

Preliminary Findings

The majority of respondents were women (90.90%, N = 30); 87.90% were single. Ages ranged from 19 to 31 years, with a mean of 22.70. Ethnicity included Caucasian (N = 24), African-American (N = 6), Asian/Asian-American (N = 2), and Hispanic/Latino (N = 1). Table 1 shows measurement scale and results of descriptive statistics, factor analysis of variables, and Cronbach's α. Reliability was assessed using Cronbach's α and reliability of all scales is acceptable exceeding the desired level of .80. All items had factor loadings of over .60 or an average of .70 or higher. Results indicate high validity for small sample sizes, and the items measuring each construct were valid. Based on the analysis of variance, 69.97% of variance was explained by application of discipline knowledge, 69.41% by gains in advanced knowledge, and 62.47% by development of soft skills. Results showed that the mean ratings of all constructs were higher than 5 = somewhat agree (application of discipline knowledge, M = 6.00; gains in advanced knowledge, M = 5.62; development of soft skills, M = 5.66).

Table 1. Measurement scale, descriptive statistics, factor analysis of variables and Cronbach's α				
Item	**Mean (SD)**	**Factor Loading**	**% of Variance**	**Reliability Cronbach's α**
Application of discipline knowledge	6.00 (.84)		69.970	.85
During the projects with students from other disciplines, I was able to… 1. Gain factual knowledge (terminology, classifications, methods, trends) about my major field of study. 2. Learn fundamental principles of my major field of study. 3. Learn to apply current and previous course materials in completing the assigned tasks. 4. Develop specific competencies needed by professionals in my major field.		.835 .759 .637 .868		
Gains in advanced knowledge	5.62 (1.01)		69.414	.91
During the projects with students from other disciplines, I was able to… 1. Learn how professionals in my field gain new knowledge. 2. Develop creative capacities. 3. Develop a sense of personal responsibility, self-reliance, and self-discipline. 4. Gain a broader appreciation of intellectual-cultural activity. 5. Develop skill in expressing myself orally or writing. 6. Discover the implications of the course material for understanding.		.620 .767 .613 .724 .779 .662		
Development of soft skills	5.66 (.97)		62.466	.96
The projects with students from other disciplines helped me to… 1. Develop responsibility and accountability. 2. Develop interpersonal skills in communicating and interacting with other people, both individually and in groups. 3. Enhance verbal communication skills such as clarity of speech, remaining calm and focused, being polite and following basic rules of etiquette. 4. Build teamwork skills. 5. Develop ethical values (e.g., integrity, honesty, fidelity, charity, responsibility, self-discipline). 6. Increase decision making and analytical skills (i.e., the ability to visualize, articulate, and solve both complex and uncomplicated problems and concepts). 7. Enhance creativity thinking (i.e., the process we use to develop ideas that are unique, useful and worthy of further elaboration) and critical thinking (i.e., the process we use to reflect on assess and judge the assumption underlying our own and others ideas and efforts).		.640 .906 .805 .840 .862 .810 .690		

8. Improve persuading, negotiating, and influencing skills.	.652		
9. Gain listening skills.	.657		
10. Understand problem-solving process (i.e., problem identification, problem analysis, plan development, plan implementation, plan evaluation).	.722		
11. Develop ability to think creative ideas and effectively communicate the idea in a visual form.	.788		
12. Enhance time management skills.	.716		
13. Increase adaptability to new technologies and terminologies.	.627		
14. Learn to give and receive constructive criticism.	.752		
15. Develop multi-tasking skills.	.693		

Main Results

ANOVA revealed that there was no significant difference among four disciplines in application of discipline knowledge [F (3, 32) = .93, p = .440]; gains in advanced knowledge [F (3, 32) = .85, p = .479]; and development soft skills [F (3, 32) = 1.67, p = .196]. Respondents agreed that they were able to apply discipline knowledge in the assigned activities; to gain advanced knowledge from practical performance; and to develop soft skills through the MCSL process. Among 15 soft skills, enhancing creative and critical thinking received the highest mean score followed by enhancing verbal communication; enhancing time management skills; developing interpersonal communication skills; learning to give and receive constructive criticism; gaining listening skills; developing ability to think creatively and effectively communicate in a visual form; increasing decision making and analytical skills; developing responsibility and accountability; building teamwork skills; improving persuading, negotiating, and influencing skills; developing multi-tasking skills; understanding problem-solving process; developing ethical values; and increasing adaptability to new technologies and terminologies (See Table 2).

Table 2. Mean scores of soft skills	
Item	**Mean**
Enhance creativity thinking (i.e., the process we use to develop ideas that are unique, useful and worthy of further elaboration) and critical thinking (i.e., the process we use to reflect on assess and judge the assumption underlying our own and others ideas and efforts).	5.97
Enhance verbal communication skills such as clarity of speech, remaining calm and focused, being polite and following basic rules of etiquette.	5.91
Enhance time management skills.	5.85
Develop interpersonal skills in communicating and interacting with other people, both individually and in groups.	5.82
Learn to give and receive constructive criticism.	5.76
Gain listening skills.	5.76
Develop ability to think creative ideas and effectively communicate the idea in a visual form.	5.73
Increase decision making and analytical skills (i.e., the ability to visualize, articulate, and solve both complex and uncomplicated problems and concepts).	5.73
Develop responsibility and accountability.	5.73
Build teamwork skills.	5.58
Improve persuading, negotiating, and influencing skills.	5.58
Develop multi-tasking skills.	5.45
Understand problem-solving process (i.e., problem identification, problem analysis, plan development, plan implementation, plan evaluation).	5.42
Develop ethical values (e.g., integrity, honesty, fidelity, charity, responsibility, self-discipline).	5.33
Increase adaptability to new technologies and terminologies.	5.30
Note: Respondents indicated their agreements on a scale of 1 = strongly disagree to 7 = strongly agree.	

Open ended essay responses reflected both insight and frustration. Some positive discussions include: "I experienced what it may feel like to work for consumers, not for me", "I learned a little about persuasion…working within the boundaries of clients' needs was not as difficult as I thought", "It reminds me to stay open-minded to others' ideas", "The group I was working with was very easy to get along with…even though there were some disagreements, we were able to function well together", "It taught me how to handle difficult group members", "I learned to take criticism to improve myself", "Communication is a key and visual presentations are important to convey ideas", "It allowed to interact directly with a client and helped to deal with translating the needs into design", "The interaction was very helpful to see what will be like when we become established in our profession", "It was an eye opener for a real project in the future", and "I gained confidence in the idea that I could be successful… the future seems less intimidating."

On the other hand, some respondents mentioned difficulties that they experienced during the projects: "I wish I would have had more time with a teacher to direct me with the other students whom seemed not as involved or interested as I was", "It is tough to negotiate sometimes", "It was terrible. My group members did not get along and it created arguments every step of the way. They did not effectively communicate", "It was very irritating to work with some individuals who did not want to listen to my ideas", "There are many different types of people out there and it is difficult to keep everyone happy", "It was stressful because of lack of communication, ideas being changed last minute…everyone was on a different page", "I felt that my entire group did not participate because I was the only one putting in effort", "Just because it makes sense to me, does not mean others get it", "It is important to have a clear understanding of what is expected", "Group projects are stressful and can be irritating", "I wish that I was involved with the projects earlier", "I did not have enough time to finish the garment the way we wanted", and "I recommend more meetings".

DISCUSSION & CONCLUSION

The current study investigated if a multidisciplinary cooperative and situated learning (MCSL) environment would help students in gaining discipline knowledge and developing soft skills. Through the proposed learning experience, students completed five projects and developed new fashion brands as groups of students from four disciplines–fashion design, fashion merchandising, fashion styling, and interior design. Results of the study are consistent with previous literature indicating the effectiveness of cooperative learning (Johnson et al., 1991; Kim at el., 2008; Ormrod, 2008), multidisciplinary learning (Chung & Meneely, 2012; Kimmons & Spruiell, 2005; Noroozi, et al., 2013), and situated learning (Byun et al., 2012; Wojahn et al., 2001).

Findings of the study showed that students were able to apply discipline knowledge in completing projects as they gained factual knowledge and applied current and previous course materials in completing assigned tasks. As students practiced what professionals in their fields would perform, students were also able to develop advanced knowledge such as creative capacities and the implication of course materials for understanding. In addition, results indicated that students developed soft skills while they interacted with others and contributed to achieve a common goal as a group. Creative and critical thinking was the most developed students' soft skill. Other soft skills that ranked top five include verbal communication, time management, interpersonal communication skills, and learning to give and receive constructive criticism. Not surprisingly, these skills were often identified as important and desired soft skills for college graduates in recent articles (Adams, 2014; Robles, 2012; Talent shortage survey, 2013; What are the 'soft skills', 2012).

Indeed, some positive discussions from the open ended essay questions were related to the developments of professionalism, persuasion skills, positive attitudes, problem solving skills, taking criticism, and interpersonal communication skills. Through situated learning, students were excited to have hands on experience of practical performances expected in their fields. Students learned to think for consumers and clients as professionals would do. In addition, many students actually enjoyed working with others, within as well as outside their discipline. Students found that multidisciplinary and cooperative learning actually was not difficult if they communicated well and interacted to meet goals. Meaningful results were also found in the negative comments. Difficulty was primarily due to the multidisciplinary cooperative learning environment, and most problems arose from the interaction with others such as handling disagreements among group members, lack of time management, and irresponsibility. Previous research indicated that conflicts arose among diverse disciplines may prevent successful collaborative problem solving due to the different perspectives (Rummel, Spada, & Hauser, 2009). Ironically, the results support the importance of soft skills and indicate the need of curriculum development that builds students' soft skills. In courses using a MCSL environment, students will be naturally exposed to various circumstances that create challenges and conflicts, and will learn to solve problems using soft skills.

Limitations and Suggestions for Future Research

Although this study contributes to the literature by showing the effectiveness of MCSL in acquiring discipline knowledge and developing soft skills, previous studies argue that multidisciplinary learning may not always bring the expected outcomes if students from different subject areas do not establish 'common ground' that is vital to group performance (Beers Kirschner, Boshuizen, & Gujselaers, 2007; Rummel et al., 2009). The current study recommends that students

be provided with enough time and opportunities to share information and understand the expertise of their learning partners before engaging in this type of learning experience (Noroozi et al., 2013). Another limitation of the current study is that it would not be valid to generalize the effects of situated learning environment on other disciplines without considering the unique characteristics of each particular workplace. Results of this study are restricted to the data of small sample size chosen to examine. However, this limitation is not overly problematic because the current study utilized a cooperative learning environment of small groups. A future study that replicates the findings can enhance the external validity of the study.

Results of the current study recommend that a MCSL will be beneficial when the learning environment is expanded to a 'real world.' For example, students may build a whole package marketing team and help an entrepreneur establish a small business of fashion brand. At the end of projects, 'the client' is invited to the final presentation to select the best plan of business to invest on. Another suggestion is to have potential target markets involved. Participants from the focus group interview are invited again to see how their preferences are incorporated in the results of projects and turned into a real fashion brand that they may want to shop apparel products from. These implications may provide students with opportunities to connect with a real world experiences.

As found in previous research (e.g., Byun et al., 2012), scheduling joint-class projects was a challenge in the current study. Students had official/unofficial meetings and were allowed to communicate freely during class meeting times of each discipline. In addition, students used various technologies to discuss about goals, share information, and complete projects. However, some students regretted that group members from all disciplines did not enroll in one common class where more efficient communication had have been accomplished. Therefore, it is recommended that implementation of this learning must be designed carefully to provide the best learning environment for students, possibly with incorporating the most effective communication technologies and systems. If such limitation is resolved, multidisciplinary cooperative and situated learning (MCSL) can be successfully implemented with different universities and even with different countries.

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TEAM-BUILDING SKILLS, SOCIAL MEDIA AND ONLINE COURSE DELIVERY

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ABSTRACT

With the increasing use of social media in society, as well as in the classroom, this study sought to examine the contribution that various resources and activities, as well as social media tools used by students, in an online undergraduate Business Technology Management course, may make to the development of various components of team-building skills. Online courses do not generally foster team-building, however, from our past research, there is indication that students seek to overcome this, as well as the missing human factor, by engaging social media.

The results found indicate that certain social media tools are used extensively by a large number of students, namely, email messaging, GLearningCampus, Texting, and Facebook, in addition to face-to-face communication. Interestingly, texting and face-to-face communications were almost tied, and phone calls were less used than most other media. These results suggest that even in a completely virtual environment, students seem to seek community, though seemingly not by traditional phone communication.

Keywords: team-building skills, social media, online delivery

INTRODUCTION

Mention the words social media and most everyone has an immediate conception of what that means. In academia attempts are made for more precision resulting in multiple definitions of the meaning of social media and social media tools (Tess, 2013). These attempts were distilled by Dabbagh and Kitsantas 2011, p. 1, to suggest the term is used to, "define a variety of networked tools or technologies that emphasize the social aspects of the Internet as a channel for communication, collaboration, and creative expression, and is often interchangeable with the terms Web 2.0 and social software.", with examples of tools such as, Delicious, WordPress, and Twitter, PBworks, Flick, YouTube, Facebook, Linkedin, Google Apps. To this list of tools, Kaplan & Kaenlein, 2010, p. 61, add Wikipedia, Second Life, Blogs, World of Warcraft, and define it as, "a group of Internet based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of user generated content". Social media use is suggested by Correa, et al., 2010, p. 247, as "the particular consumption of digital media or Internet that has little to do with traditional informational use."

Bass 2012, p.1, proposed applying "disruptive innovation" to the problem of learning in higher education. Based on the definitions in the paragraph above, it is simple to see how social media could be considered one such disruptive innovation in education, if one accepts the definition Bass provides from Clayton Christensen, "a product or service takes root initially by simple applications at the bottom of a market and then relentlessly moves 'up market', eventually displacing established competitors." It's not hard to see this playing out with the increased use of social media in the educational context. Research by Educause Center for

Applied Research (ECAR), 2012, as reported in Gikas and Grant, 2013, found 67% of students report that mobile devices (which facilitate social media use) is important for their learning and one study found social media use has increased from 2007 to 2010 and that the age gap between users is shrinking. In their own study, Gikas and Grant, 2013, p. 21, found that students described the use of social media to assist learning as, "(a) accessing information quickly, (b) communication and content collaboration, (c) variety of ways to learn, (d) situational learning".

It seems a natural progression to link social media with team-building. The term team-building itself also has many definitions or components. As used by the authors of this paper in previous research, team-building skills are defined as, "Coordinating Work – bringing together work from multiple sources and team members; Team Cooperation/Collaboration – interpersonal skills, resolution of differences; Communication skills – conveying ideas effectively, both orally and written" (Thomas, 2001, Thomas and Morin, 2007), constructs supported by McKendall, 2000, Fapohunda, 2013, Ben-Zvi, 2007 and Roseth et al., 2008. The collaborative aspect of team-building is defined by Hermsen, et al., 2010, as translated by Voorn and Koomers, 2011, as "active listening, receiving and giving feedback, honouring one's commitments, contributing to fair division of tasks, being assertive, the co-creation of a good collaborative atmosphere and taking responsibility". The acquisition of these skills would seem to be naturally supported by the use of social media. While a still new area for research, some studies already suggest that social media can have an impact on learning even on the development of team-building skills. (Tess, 2013;Voorn & Kommers, 2011; Cochran & Bateman, 2010; Liaw, Hatala & Huang, 2010).

In an online course, the impression is one of isolation in which students most likely work independently, without reference to their fellow students, apart from some possible discussion board exchanges. Developing team-building skills seems a distant possibility. (Benson & Samarawickrema, 2009; Mandernach, 2006; MacKnight, 2000). While students appreciate the convenience of online course delivery, the need for the human component is still vital and they tend to seek it out. This expectation has been observed in our own past research. (Thomas, et al., 2016; Morin, et al., 2015). The popularity of social media interaction suggests that students are likely to employ these means of communication to enhance their online learning experience, with or without instructor intervention.

The above assertions are the focus of this current research, expanding on previous work which examined solely communication skills (Thomas, et al. 2016a). In this paper work coordination and team cooperation were additionally examined. These three components were investigated in a previous study and were found to be the main three legs of team-building skills (Thomas, et al. 2016b). In particular, the current study examined students' perceptions of the development of the three identified components of team-building skills from the resources and activities used in an online, undergraduate Business Technology Management course. Secondly, it also examined whether, for the purposes of the course, students seek alternate means of communication amongst themselves, to compensate for the lack of the face-to-face component of the course.

THE STUDY

In this paper, students' perceptions of their acquisition of the three components of Team-Building from the various activities and resources used in a virtual Business Technology Management course, and the social media tools they employ for the purposes of the course, were explored. The research questions were:

1. What is the relative contribution of the activities and resources of the course to the perceived acquisition of the three components of Team-Building skills?
2. Did students enlist social media tools to assist in the course? What were they?
3. Did the choice of social media have an impact on the perceived contribution of activities and resources to the development of the three components of Team-Building skills?

Based on Thomas, 2001, and building on prior research (Thomas, et al., 2016b); Thomas and Morin, 2012, 2010, 2006), the three components of Team-Building skills are identified as Communication, Work Coordination and Team Cooperation and are defined as follows:

✓ **Communication:** conveying ideas effectively, both orally and written
✓ **Work Coordination:** bringing together work from multiple sources and team members
✓ **Team Cooperation:** interpersonal skills, resolution of differences

Several activities and resources were offered in the course to assist in the development of these skills. Students were also given a list of social media tools and asked about their use. These are:

Table 1 ACTIVITIES, RESOURCES AND REPORTED SOCIAL MEDIA USED IN THE COURSE		
Activities	**Resources**	**Social Media Tools**
Assignments Discussion Board Discussion Cases Practice Quizzes Website Project	Textbook PowerPoint Notes Overall Platform	Email, Facebook, Phone Calls, Text Messaging, Blogging, Face-to-Face, GLearning Campus, Other.

The Discussion Cases refer to the activity where students discuss a case online and the Website Project consists in the activity where students design a website. The Website Project was an activity in which students could do the work as a team or individually. Most students choose to form a team to complete the project. If done as a group, students were asked to evaluate and comment on each other's performance. Comments were generally positive. The Overall Platform used for the course is the eConcordia Course Management System and the GLearning Campus is the communication system part of the online platform.

An online survey was sent to all students registered in the course. The instrument was made up of three parts:
   a) students' demographics and their level of understanding of the definitions provided of the three components of team-building skills,
   b) students' perceptions of the contribution of various activities and resources towards the three components of team-building skills,
   c) students' choice of social media tools to communicate amongst themselves.

RESULTS

Demographics

There were 376 students who participated in the survey, of which 54% were male and 46% were female. Most had moderate to extensive computer experience with 53.5% having moderate and 42.6% having extensive experience. Most students (60%) were between 20 and 22 years of age, and most students had taken at least one online course, the average being 2.3.

Understanding of Definition

Students were asked to rate their understanding of the definition of the three components of Team-Building on a scale from 0 (No understanding at all) to 10 (Very High understanding). As seen in Table 2, the average understanding score for each skill was Communication: 8.31, Coordination: 8.36 and Cooperation: 8.53 out of 10. Of these, 84.8% indicated they had an extensive understanding of the definition of Communication, 85.9% of Coordination, and 87.5% of Cooperation. The definition of Cooperation is the most understood. Therefore we are confident that the respondents clearly understand the definitions used in this research.

Table 2 LEVEL OF UNDERSTANDING OF DEFINITIONS Students were asked to rate their level of understanding of the definitions from 0 (No understanding at all) to 5 (Average) to 10 (Very High understanding)			
	Communication (n=376)	Coordination (n=375)	Cooperation (n=375)
Extensive (7 to 10)	84.8%	85.9%	87.5%
Moderate (4 to 6)	13.9%	12.0%	10.6%
Minimum (0 to 3)	1.3%	2.1%	1.9%
Average (Standard Deviation)	8.31 (1.71)	8.36 (1.78)	8.53 (1.76)

Students' Perceptions of Team-Building Skills Acquisition

Research Question 1:
What is the relative contribution of the activities and resources of the course to the perceived acquisition of the three components of Team-Building skills?

Table 3 presents the contribution of course components (activities and resources) to the development of each of the components of Team-Building skills. It can be seen that on average, students perceived that the Assignments and the Website Project contributed the most to each of the components of Team-Building. In particular, the Website Project gave the highest perceived contribution with 93.07% for Communication, 94.13% for Coordination and 92.78% for Cooperation combining ``Moderately`` and ``A lot``, responses. In second place, the Assignments also have strong perceived positive contributions, with 87.67% for Communication, 89.81% for Coordination and 87.10% for Cooperation. The activity that is perceived to

contribute the least to all the components of the Team-Building is the Practice Quizzes, with positive contribution perceived contribution between 39 and 43%. It is encouraging that most students tackled the practice quizzes individually rather than seeking to make it a team activity.

Among the resources offered in the course, the PowerPoint Notes contributed the most to Communication and Coordination skills while the overall Platform contributed the most to Cooperation. The textbook contributed the least to all the components of Team-Building which makes sense as reading the textbook is essentially an individual endeavour. The surprise is that it was almost 50-50. It would be interesting to know from those who did perceive the contribution how the textbook helped to achieve these skills.

In order to assess whether the different activities and resources offered in the course have a significant different level of impact on each component of Team-Building skill, an analysis of variance was conducted. It was found that the mean perceived contribution of activities and resources were significantly different with p-values under 10^{-140} for each of the three components. Also several additional analyses of variance were performed to assess if each activity and each resource contributes to the three components significantly differently. The sign S^+ means that the corresponding p-value < 0.01, S means $0.01 < $ p-value < 0.05 and N means no significant difference at 5%. The average perceived contributions of the Website Project to the three components of Team-Building skills are not significantly different. The same is true for the Overall Platform. All other activities and resources contribute differently to each skill.

		Communication	Coordination	Cooperation	Anova Per Act&R
Table 3 **STUDENTS' PERCEIVED CONTRIBUTION OF ACTIVITIES AND RESOURCES TO THE THREE COMPONENTS OF TEAM-BUILDING SKILLS**					
	n	Mean (St. dev) + impact %	Mean (St. dev) + impact %	Mean (St. dev) + impact %	Significance p-value
Activities					
Assignments	373	2.32(0.68) 87.67%	2.49(0.67) 89.81%	**2.50**(0.71) 87.10%	S^+
Discussion Board	375	**1.88**(0.73) 66.40%	1.75(0.76) 55.88%	1.69(0.76) 50.93%	S^+
Discussion Cases	375	**2.05**(0.74) 75.34%	1.84(0.72) 64.80%	1.58(0.70) 46.13%	S^+
Practice Quizzes	373	1.50(0.63) 42.25%	**1.54**(0.66) 44.65%	1.42(0.61) 39.29%	S
Website Project	375	2.57(0.62) 93.07%	2.63(0.59) 94.13%	**2.64**(0.61) 92.78%	N
Resources					
Textbook	375	1.54(0.61) 48.13%	**1.74**(0.73) 56.53%	1.61(0.69) 48.53%	S^+
PowerPoint Notes	374	1.81(0.73) 62.03%	**1.86**(0.74) 64.71%	1.70(0.69) 56.53%	S^+
Overall Platform	375	1.77(0.72 60.48%	**1.80**(0.72) 61.87%	1.74(0.72) 58.24%	N
Anova per skill (p-value)		S^+	S^+	S^+	
Legend: *The mean and standard deviation are calculated by assigning 3 to "A lot", 2 to "Moderate" and 1 to "Not at all". **The Positive Impact corresponds to the combined percentage of "A lot" and "Moderate" S^+: Significance < 0.01; S: $0.01<$ Significance < 0.05, N: Not significant					

We can also observe, highlighted in bold, towards what component, each activity and resource contributes the most. We can see that the Assignments and the Website Project are perceived to contribute the most to the development of Cooperation skill, while the Discussion Board and Discussion Cases contribute the most to Communication skill. The perceived contributions of the Practice Quizzes to each of the components of Team-Building skills are the lowest of all activities and resources. It is even significantly lower for Team Cooperation. It is comprehensible since this activity is meant as a tool for students to deepen their understanding of concepts and practice their applications. As for the resources, they all contribute the most to the development of Coordination skill.

Social Media Used

Research Question 2:
Did students enlist social media tools to assist in the course? What were they?

Table 4 indicates that students used on average 3.18 different social media tools to communicate with their fellow students, with 1% of them using no social media tools at all, and more than 60% using at least 3 social media tools (18%+22%+16%+5%+0.5%). Table 4 also shows that Email is the most popular media of communication, being used by 80% of students, followed by G Learning Campus at 65%, and Facebook at 57%. It can be observed also that a high percentage of students, 47%, still used Face-to-Face communication even if this course is offered online. Only 19% used phone calls, 5% used Skype, and 1% used Blogging. Only three percent indicated they used other means of communication, such as Whatsapp and Googledocs. One percent used no communication at all. Also, we observe that 99% of students reported using at least one social media (including Face-to-Face) to communicate with their fellow students.

Table 4 SOCIAL MEDIA (Usage and Types) (N=376)			
Number of Social Media Tools Used	Frequency	Type of Social media	Frequency
0	1%	Email	80%
1	13%	G Learning Campus	65%
2	25%	Facebook	57%
3	18%	Face-to-Face	47%
4	22%	Text messaging	46%
5	16%	Phone calls	19%
6	5%	Skype	5%
7	0.5%	Others	3%
Average	3.18	Blogging	1%
		No communication	1%

Impact of Social Media Tools on Students' Perceptions

Research Question 3:
> *Did the choice of social media have an impact on the perceived contribution of activities and resources to the development of the components of Team-Building skills?*

Further analysis was performed to determine whether the usage of social media tools affects the perception of the contribution of activities and resources towards the enhancement of Team-Building components. In Table 5, it is observed that the use of social media seems to impact some of the perceptions of the contribution that activities and resources make to the development of Team-Building components. Significant differences in perceptions were observed according to use of certain social media. The following five social media tools were studied in detail: Email, Facebook, Text Messaging, Face to Face and GLearning Campus. These were selected as they were used by at least 45% of the sample. Each social media will be analysed separately.

Significant differences at 10% were recorded in Table 5. We note that the usage of the social media tools shows no significant impact on the perception of the contribution made by Discussion Board, the Textbook and the Overall Platform to any of the Team-Building components. However the following observations can be made:

- Impact of Email
  Students, actively using Email Messaging, found that the Assignments and the Power Point notes contribute significantly differently to the development of Cooperation skill; in fact students who do not use email identify more support than those who do. No other significant difference has been identified.
- Impact of Facebook
  None of the resources are impacted by the use of Facebook (FB). However significant differences of the perceived contribution of several activities to Team-Building components have been identified. We first note that the Assignments, the Discussion cases and the Website Project were all perceived to support the development of Communication skills in a significantly different level. For example, students who use Facebook, perceive that the Assignments and the Website project contribute more, while the Discussion Cases contribute less to the skill. In addition, the Assignments contribute differently to Coordination in fact, those who use Facebook, perceived a higher level of contribution than those who do not.
- Impact Text Messaging
  Students, actively using Text Messaging, found that the Assignments contribute significantly differently to the development of the Communication skill, and the Website project to the Coordination skill, in fact, those who use Text Messaging perceive a higher contribution to those skills.
- Impact of Face-to-Face
  Students, relying on Face-to-Face (FtoF), found that the Practice Quizzes contribute significantly differently to the development of the Coordination skill, and the Power Point Notes to the Cooperation skill, in fact, those who do not use Face-to-Face perceive a higher contribution to those skills.

- Impact of GLC

  Students, actively using the GLearning Center (GLC), found that the Assignments, the Discussion cases and the Power Point Notes contribute significantly differently to the development of the Communication skill, and the Discussion cases, the Website Project and the Power Point Notes to the Coordination skill, while the Website project also contributes differently to the Cooperation skill. Those who do use the GLearning Center perceive a higher contribution to those skills.

Table 5
STUDENTS' PERCEIVED CONTRIBUTION OF ACTIVITIES AND RESOURCES TO TEAM-BUILDING SKILLS AND SOCIAL MEDIA

		Communication		Coordination		Cooperation	
Activities							
		No	Yes	No	Yes	No	Yes
Assignments	Email					2.623	2.468
	FB	2.247	2.384	2.407	2.555		
	TEXT	2.267	2.392				
	FtoF						
	GLC	2.244	2.368				
Discussion Board	Email						
	FB						
	TEXT						
	FtoF						
	GLC						
Discussion Cases	Email						
	FB	2.132	1.986				
	TEXT						
	FtoF						
	GLC	1.930	2.110	1.725	1.900		
Practice Quizzes	Email						
	FB						
	TEXT						
	FtoF			1.596	1.483		
	GLC						
Website Project	Email						
	FB	2.509	2.623			2.577	2.697
	TEXT			2.585	2.694		
	FtoF						
	GLC			2.519	2.700	2.542	2.700
Resources							
Textbook	Email						
	FB						
	TEXT						
	FtoF						
	GLC						
PowerPoint Notes	Email					1.831	1.664
	FB						
	TEXT						
	FtoF					1.767	1.624
	GLC	1.710	1.860	1.733	1.922		
Overall Platform	Email						
	FB						
	TEXT						
	FtoF						
	GLC						

Legend:
*The mean and standard deviation are calculated by assigning 3 to "A lot", 2 to "Moderate" and 1 to "Not at all".
* indicates significance below 0.05
* Yes indicates the use of that specific social media tool, and No that it was not used.

CONCLUSION

The results of the study presented here indicate that, by using various activities, resources, and tools in the course, it is possible to foster the development of team-building skills in a completely online course, in particular skills related to communication, team cooperation and work coordination.

It was found that different activities and resources contribute significantly differently to the acquisition of the components of Team-Building skills examined. In particular, the Website Project and the Assignments are the best activities to develop each of the three components of Team-Building skills. Discussion Boards and Discussion Cases also contribute but at a lesser level. Practice Quizzes, although very important for deepening the students' understanding of a concept and its applications, cannot be expected to develop the skills under study. In fact, their perceived contributions to the three components are lower than those of the Textbook, the PowerPoint Notes and the Overall Platform. These results are important for online course developers seeking strategies to help students develop these skills.

Supporting the results found from the comprehensive literature review conducted in the area by Tess 2013, our results also indicate that we can no longer ignore the usage of social media in the learning process of students. This paper demonstrates that not only do students seek community even in an online course, but that when students use a certain social media tool, their perceived contribution of activities and resources to the development of the components of Team-Building skills is impacted. What seemed to work better in the past does not always work as well in the world of access to multiple media.

For example, students very active on social media may not appreciate the value of the Discussion Board as much as those who are less active. It is understandable, since their communication needs are covered outside the pedagogy of the course. In the past discussion boards were probably the only way for online students to communicate among themselves. Frequently students now create a Facebook account to post questions and answers not monitored by the professor or the teaching assistant, potentially obtaining the wrong answers, which is a concern.

The expectations of students are also getting very high; many will expect to find course support on YouTube and other social media outlets. Answers to students' email, which according to the results found in this study are their favoured means of communication, when addressed to the instructor, are expected within a very short turnaround time. Instead of searching for an answer themselves, students simply send an email to the professor or teaching assistant and expect an immediate response. This new phenomenon could eventually have a possible impact on students' problem solving skills which could be the subject of another research study.

Many professors start to feel that this new teaching environment makes their work much more difficult and demanding. In addition to the many demands, professors might have to think about posting questions via social media outside of the confines of the course management support system in order to engage students. For the instructors, it often means retooling and retraining, specifically in how to effectively integrate the various technologies to enhance the learning experience.

As was found in this research, in spite of the complete virtual environment of the course, students are developing the three components of their team-building skills, but it is not completely certain if the social media tools are complementing the activities and resources of the course or actually replacing some of them. In line with the recommendations coming out of the

literature review conducted by Tess, 2013, this would need to be studied more deeply so as to be able to make specific recommendations for enhancing pedagogy. In an online context, the human-to-human interaction might still be as relevant as the human-computer interaction experience, as evidenced by the high percentage who reported that they continue to make use of face-to-face communication though not phone calls, in spite of the preponderance of smart phone ownership among the student population.

All the above areas will be ripe for research for many years to come.

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DOWN AND OUT: FACULTY DOWN-SIZING AT CU

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CASE DESCRIPTION

The primary subject matter of this case concerns higher education leadership and handling personnel (particularly faculty) expenses during challenging financial times. Secondary issues examined include HR (Downsizing), organizational culture, Business Ethics, Change Management, and finance. The case has a difficulty level of six, appropriate for second year graduate level. The case is designed to be taught in two (2) class hours and is expected to require two (2) hours of outside preparation by students.

CASE SYNOPSIS

CU ("Case" University) provides an interesting example of higher education leadership and handling personnel (particularly faculty) expenses during challenging financial times. This case will explore the history of CU; the context of the financial challenges; the leadership actions taken toward faculty, particularly the faculty in the College of Business (COB); and ramifications for organizational culture and possible lessons learned for corporate (organizational) governance. We will focus on the events of the 2008-2009 school year in particular since this time frame provided the context for the down-sizing actions covered by this case. Hopefully the example and lessons learned can be applied widely to other institutions as a case study of what not to do in handling the down-sizing that can result from a financial crisis.

CASE BODY

CU was founded in in the later part of the 20th century through the vision and generosity of a small group of businessmen who wanted to establish an urban university with high moral character. The founding President served for 25 years and was known for his energetic and visionary leadership. During his tenure, CU grew to 3,000 undergraduate and graduate students. CU enjoyed NCAA Division I status and competed nationally in golf and track. However, vision had outstripped fiscal reality and it was time for a new president to steady the financial boat.

The second president served for almost 20 years. He had a business background and balancing the budget became his passion. CU's financial position solidified and a major project was funded; a new state of the art theatre/chapel/museum facility. However, there was a cost. To meet budget, The President moved CU from pricey NCAA Division I status. Faculty salaries were kept at a more affordable level and professional development was available but not stressed. Also, faculty did not have tenure. Faculty could receive up to a three year contract but many faculty maintained one or two year contracts. CU's culture could be characterized as friendly, yet politically motivated and confusing at times with some individuals wielding unusual power and influence for their background and qualifications. For example, one individual with only a Master's degree in Accounting who had served as the administrative assistant to the COB MBA program was established as the Dean for COB for a total of 3 1/2 years.

After 2005, the CU Board felt like it was time to return to the aggressive, energetic earlier days of CU by hiring a new President from a nationally known, major university. The new President was a known scholar and advanced an aggressive strategic plan at his previous school including new buildings, a changed curriculum and different faculty. His goal was to create an exemplary liberal arts institution in the vein of a school like Notre Dame by introducing a rigorous liberal arts curriculum, enlisting quality faculty, and building state of the art facilities. Though many lauded his efforts, the faculty senate showed a no-confidence vote. Under pressure, he finally stepped down as president but remained as chancellor for another year.

When the new President came to CU, he seemed to want to avoid the problems with faculty that had surfaced at his previous institution. During his first six months, he met personally with CU faculty by groups to discuss issues and to take suggestions as to what the university should be. These faculty discussions were summarized and formed the foundation of the CU vision document. The President also helped resolve faculty disputes in a positive way which encouraged faculty. He was readily available and allowed for much communication with faculty. He took other practical steps to support faculty including free tuition for faculty (and staff) who wanted to take courses at CU and reimbursement even if faculty attended elsewhere. He sought for and received approval from the Board to significantly raise faculty salaries. So after his first year, momentum was high with the CU faculty. Most faculty supported the new Vision whole-heartedly and looked forward to a bright future.

One example of the empowerment faculty felt was reflected in the COB. A Professor in Management with 20 years experience in higher education leadership, was moved from the Associate Dean position to the Interim Dean for COB. Through an external contact, she was inspired to develop a Center for Business Ethics (CBE) which would act as a clearing house for research and community involvement and fellowship for people seeking to combine high ethical standards and business. The President approved the idea and the COB Dean (though an interim Dean) felt empowered to move forward, seeing the Center as a good fit with CU's Vision. Later that Fall, the CBE carried out a mentoring and leadership program in partnership with a nationally known non-profit for all Junior and Senior business students participating and over 40 business leaders from all over the country, including local leaders. Feedback about the event was very positive with several COB faculty saying it was the finest event they had experienced on the CU campus in the previous ten years.

Meanwhile, financial obligations were increasing. Along with the rise in faculty salaries, two new buildings (an academic building for the fine arts faculty and Honors College and a large student dorm building) were planned and built (in addition to the new fine arts building where pledges for funding had been raised by the previous president). The CU President brought in a number of new staff to help implement his new plans. CU sought a return to NCAA Division I status and hired a number of new personnel to help with the transition. Because of its interim status, CU's sports teams had to travel extensively (with few home games) to find teams to play which greatly increased expenditures. CU initiated a lawsuit to reduce its probation period at a cost of tens of thousands of dollars. CU started an honor's college with low faculty to student ratios and with a need for new space. A continuing studies program was initiated and led by a long-time CU faculty/staff member with no experience in this area costing tens of thousands of dollars and taking more than a year to produce any income at all and then was closed several years later.

Another major issue reared its head. For approximately 30 years, CU faculty reported to the Vice President (VP) of Academic Affairs. He had helped establish a basic liberal arts

curriculum which gave students the flexibility to choose among a number of options for meeting this (approximately 60 hour) requirement according to major. He stepped down and a search committee was formed to find a new VP of Academic Affairs (now Provost) who could implement the President's curriculum agenda based on the Vision. After a nine month search CU announced the hiring of their new Provost. The new Provost had a PhD in Political Science; served as Dean of academic affairs at a small, specialized university in rural Virginia; and before coming to CU served in various capacities in the State Department. This hire would prove to be critical to the events that unfolded in the next academic year.

As the new academic year began, CU was facing an immediate challenge. For two years the VP for Enrollment Management had done a superb job (hired by the President from his previous university) raising the level of activity and enrollments generated by the CU admissions office. Student contacts and enrollment grew significantly over the previous year. Using solid statistics, he had made best estimates of how many students would enroll at CU for fall of the new academic year and for the entire academic year. The budget was supposed to have been based on these enrollment estimates. For whatever reason, there seemed to be a disconnect between how many students actually enrolled at CU for the Fall semester and the numbers which formed the basis for the academic year budget. This created a financial problem as raising expenses (as detailed above) were met with lower incomes (even though there were record CU enrollments). To complicate matters, the new (and very costly) student living facility was not filling up because the rent was more expensive than the other student living areas on campus so students did not participate.

Then two other events added fuel to the fire of financial failure facing CU. Like every other organization, a national economic down turn hit hard. At the same time, a major storm slammed into the area and crippled two key buildings on the CU campus including the student life center (and bookstore) and the main administration building. The campus shut down for one week. Initial assessments put the damage at $8 to $10 million or more. CU had an immediate short-term cash flow problem as they had to pay to reorganize the campus without the use of two important buildings as well as begin cleanup efforts.

At this point, the CU leadership appeared to realize that they had a major financial crisis that was much worse than anyone could have anticipated. Evidently plans were made to resolve the problem but the majority of faculty were not informed. Let's examine how the CU leadership responded to this financial crisis.

It was well known that the Provost had a mandate to establish an aggressive liberal arts curriculum for all undergraduate students at CU. The Provost (at the CU Fall Faculty meeting) had stated publically that students were too inexperienced to make their own choices for liberal arts courses, so it was decided to establish a list of required liberal arts courses for all students. A committee of faculty members with at least one representative from each CU college began working diligently to come up with the list of required liberal arts courses. The goal was to adopt and apply this new liberal arts requirement for students as quickly as possible (for the next academic year). This required hiring more liberal arts faculty including faculty needed to run the new Scholars Program.

It also meant other changes for specific academic areas. Historically, well-known schools (like Harvard or Rice) focused on rigorous liberal arts courses and did not include professional programs in their undergraduate curricula. It was not certain whether the conscious decision had been made to eventually end CU's undergraduate Bachelor of Business Administration (BBA) program. Certainly the majority of the CU faculty were not informed one way or the other.

COB's status was changed from a College to a School. What was clear (through the actions that transpired) was that with the financial challenges CU faced, faculty salaries had to be cut somewhere. The business school appeared to be particularly targeted as a source of "financial relief" as 1/3 of the COB faculty were let go over the next 18 months. Faculty from other colleges were also let go as well. Starting in December through February of the next year, approximately 10% of the entire CU faculty were let go. More faculty were let go in May. Ironically in a March article in the local newspaper, CU was discussed along with several other private universities in the state. CU was the only school to dismiss faculty as a response to the financial challenges presented by the economic downturn of the time.

Sometimes hard decisions have to be made in organizations about who will be let go and why. This is called down-sizing. Best practices are readily available on how to do it in a humane manner. At CU, there was no record that any research, planning or consideration was given on how to down-size in the most professional way. Thus an organizational problem emerged from how faculty were evaluated, treated and let go. There seemed to be no strategy, no working with faculty, little regard for basic business professionalism and respect of faculty in the process.

To start with, the CU faculty had spent a great deal of time and effort to recommend procedures for faculty evaluations which had been adopted. However when it came to determining who would be let go, the faculty evaluation process became confusing. For example, the interim Dean of COB for the previous year and had done an outstanding job. She was fully qualified and applied for the vacant COB Dean's position. The faculty was supportive of her and her accomplishments. However, she was not accepted as Dean by the Provost. No reason was given as to why she was not selected.

Within days another CU COB faculty member applied for the Dean's job and within a month was appointed the Dean of COB by the Provost despite reservations about this candidate from several COB faculty member and the fact that this individual had no real higher education experience (except the past 9 months as head of the CU MBA program), weak credentials, no publishing experience, and no training in management. It was surmised by a number of faculty members (although not officially confirmed) that this faculty member had been interacting with the Provost about COB matters during the interim dean's tenure and being considered for Dean, a clear conflict of interests since he, himself was being considered for the job. In any case, this dean hire impacted faculty evaluations that followed.

The COB faculty assumed that the interim Dean would be completing the faculty evaluations since she had served as COB Dean for the previous year, the time basis for the evaluation. The new Dean was simply to meet with faculty members along with the outgoing Dean and make recommendations for future goals and plans. However, this is not what happened.

Two COB faculty members received letters of dismissal in December shortly after the new Dean had taken office. The outgoing interim Dean gave one a Steller evaluation and recommendation for promotion. This evaluation was never considered. The new Dean had even gone through the motions of "looking" at the individual's promotion package (which took a number of hours to compile) even though a decision for dismissal had evidently been made a number of weeks earlier. But despite these problems, these actions were somewhat understandable from a financial standpoint since both of these two faculty members for political and other reasons had short-term contracts and thus could create a short-term cost savings for CU.

The rest of the COB faculty evaluations appeared suspect. The new Dean personally carried out the interviews (without the interim Dean's input as was promised) and was critical of several faculty for what appeared to be disingenuous reasons. For example, he reprimanded one of the management faculty for not publishing in "prestigious enough" journals when this faculty member led COB in research awards and publications during the evaluation year and had started an international business program that had enrolled more students than any other business major except for marketing. The business faculty saw the hypocrisy of this new Dean with no publications and no sign of working on any publications assessing other faculty on research. The confusion continued in February when four other faculty were told that they were being dismissed, including the afore-mentioned management faculty member and an associate professor who taught law for COB who was on sabbatical at the time (a high academic honor). This announcement infuriated the COB faculty because no one could understand the actual bases for these dismissals. Theoretically faculty were to be evaluated based on teaching, university service, and professional activity (according to previous policy). All of these faculty members were solid teachers, were active colleagues and were active in publishing and other professional activity. The people who were not renewed were people who expressed opinions, who were leaders but who may have created apparent political problems for the new Dean at some point in the past. It appeared that the entire evaluation process was simply a pretext for "finding problems" with faculty members so that they could be dismissed. Faculty who were seen as high performers by the rest of the COB faculty were "all of a sudden" not effective according to the Dean.

None of the dismissed faculty were told why they were let go. In fact, the faculty handbook which normally would detail how faculty evaluations were to be carried out and also detail the appeal process was removed in December when the dismissals began. A visit to CUs HR department revealed that somehow the Provost was "working" on revising the handbook at this critical time. So there were no guidelines in place to protect faculty. They simply received letters of non-renewal from the CU President citing that they were being let go based on the "recommendation of the Provost and Dean." This afforded another problem. How could this new Dean make recommendations for non-renewal (i.e. in December) when he had only been Dean for two weeks prior to the dismissals. The new Dean tried to argue that it was "really the Provost" who had done this and he had little to do with it but the COB faculty did not buy this weak argument.

When faculty started being dismissed in December, the faculty were sad and concerned. As mentioned earlier, the CU faculty were a supportive family for the most part especially in COB and there was concern for those who would be leaving. So, naturally there were discussions about why, about how evaluations were being handled, and about (in COB) the confusing way that the new Dean was appointed. Soon emails were sent out from the Provost office "not to discuss" these things. It was well known that there were "moles" among the staff who quickly reported any disparaging words to the Provost. A CU faculty meeting was held in early January before the start of the Spring semester and the Provost spent over two hours speaking about new policies and at least four times indirectly criticized CU and CU faculty (for not being "normal" like other schools) to the point that a faculty member stood up to defend the CU faculty and remind the assembly that there were some positives. At no time did the Provost speak about vision and values except to woodenly say that "all" that we do must be in line with the updated university vision statement.

Faculty continued to confer about the dismissals. In February, as noted above, a second round of dismissals took place which led to faculty discussing the matter at Faculty assembly. One COB faculty member was chided by the new Dean via email for bringing up the matter in faculty assembly and ostensibly breaching confidentiality of the dismissed faculty. Immediately the dismissed faculty (who though were not renewed were serving out the remaining few months of their contracts) emailed the entire COB faculty giving permission to discuss. In response, the Provost set up a faculty meeting for COB. The "meeting" lasted approximately five minutes. It consisted of the Provost lecturing the COB faculty to quit talking about the dismissals and that they had been "unprofessional" and "unethical." A COB faculty member (of over 20 years) apparently had the "wrong" expression on their face during the tirade so the next day they received a dismissal letter from the Provost making a total of seven (out of 21) COB faculty members who had been dismissed with another one leaving for personal reasons (bringing the total to eight). In none of these cases did the Provost meet with the faculty members under consideration for dismissal to give them the chance to defend themselves and to present a different point of view. A new clause was introduced by the Provost into faculty contracts which insisted on loyalty and declaring that "insubordination" was grounds for dismissal.

The former interim Dean symbolized the apparent hypocrisy and confusion in the CU culture for faculty. The previous COB interim Dean with no credentials and no experience was fully supported by CU administration in hiring and firing decisions and was treated as a de facto Dean for 3 1/2 years and actually promoted by doing little or nothing of strategic substance. The most recent interim Dean came with stellar credentials including an PhD in field, over 20 years of effective service in higher education, a strong ethical character and multiple publications; and she was dismissed "for cause" in late May for taking initiative to resolve a pressing student problem in her then role as Associate Dean.