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GENERATIVE AI IN HIGHER EDUCATION: A MULTIDIMENSIONAL FRAMEWORK FOR RESPONSIBLE INTEGRATION

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ABSTRACT

Generative Artificial Intelligence (GenAI) tools are rapidly transforming higher education by creating opportunities for personalized learning, inclusivity, and institutional efficiency. Yet their adoption raises unresolved challenges related to academic integrity, fairness, and governance. This paper introduces a multidimensional policy framework that integrates four interconnected dimensions, namely Pedagogical, Operational, Governance, and Ethical/Cultural, to guide responsible GenAI adoption. Unlike existing models, the framework addresses academic integrity in all dimensions and incorporates an implementation model that illustrates how institutions can progress from ad hoc experimentation to ethical, systemwide integration. Practical strategies, including assessment redesign, faculty development, infrastructure investment, and ethical oversight, are outlined to help institutions balance innovation with accountability. By adopting this holistic approach, higher education institutions can ensure that GenAI strengthens rather than undermines their educational mission.

Keywords: *generative artificial intelligence, higher education, academic integrity, policy framework*

INTRODUCTION

The emergence of Generative Artificial Intelligence (GenAI) tools is one of the most disruptive developments in higher education over the past decade. Students increasingly rely on these tools for writing assistance, feedback, and adaptive learning, while instructors and administrators use them to streamline grading, lesson planning, scheduling, and decision-making. GenAI tools make higher education more equitable and responsive by supporting personalization, accessibility, and efficiency.

At the same time, the rapid integration of GenAI tools reveals critical challenges. Human-like text generation blurs boundaries between authentic student work and AI-assisted output and complicates academic integrity and authorship. Detection tools remain inconsistent, while automated grading introduces risks of bias and opacity. Institutions also face uneven instructor training, limited infrastructure, privacy concerns, and fragmented policy responses. These challenges address the need for a systematic and value-driven approach to GenAI adoption.

This study proposes a multidimensional policy framework developed for the responsible integration of GenAI tools in higher education. The framework treats Pedagogical, Operational, Governance, and Ethical/Cultural dimensions as interdependent to emphasize that weaknesses in

one domain create risks across others. It positions academic integrity at the center of dimensions to highlight that integrity should be the guiding principle for responsible adoption. The framework also introduces an implementation model that outlines progressive stages of GenAI adoption, from ad hoc experimentation to adaptive, ethically grounded transformation. By connecting these dimensions and providing practical strategies for implementation, the paper extends prior work on AI ethics frameworks with the goal of helping institutions move beyond fragmented responses toward a coordinated, accountable, and future-oriented approach.

LITERATURE REVIEW

GenAI tools are reshaping higher education by offering powerful pedagogical benefits that enhance personalization, accessibility, and engagement (Gamage et al., 2023). AI-driven generative pre-trained transformers (GPTs) such as ChatGPT and Copilot help students organize their ideas, improve writing clarity, and receive real-time feedback (Liu et al., 2023), while intelligent tutoring systems (ITSs) adapt content and delivery pacing to individual learning needs (University Canada West, 2025). These systems can even identify struggling students early, enabling timely instructor intervention (Létourneau et al., 2025). For multilingual learners and learners with disabilities, medical conditions, or learning differences, AI-powered writing assistants and paraphrasing tools such as QuillBot, Wordtune, and Speechify break down language and accessibility barriers and promote inclusivity (Avello-Sáez & Estrada-Palavecino, 2023; Bin-Nashwan et al., 2023).

GenAI tools also streamline lesson planning and content creation for faculty to reduce administrative burdens (Dutton, 2025). Automated grading and formative assessment tools provide rapid, personalized feedback to help learners track their progress and strengthen their critical thinking skills (Kasneci et al., 2023). Strategic and methodical integration of GenAI tools in contemporary education improves pedagogical efficiency while supporting creativity, equity, and learning.

While GenAI tools open exciting possibilities for teaching and learning, they also introduce complex pedagogical challenges that cannot be ignored. The ease of producing human-like text encourages students to overuse these tools (Kasneci et al., 2023), which blurs the line between legitimate support and academic dishonesty (McKinsey & Company, 2024; Chan, 2023). Surveys reveal that nearly one in three students use GenAI tools for assignments, and 60% of higher education students rely on them for more than half of their coursework (Chan, 2023; Eke, 2023).

Relying heavily on GenAI tools turns learning into a passive process rather than an active and reflective experience. Confirming whether students' work is truly their own becomes increasingly difficult as AI-generated content often passes detection tools. This degrades confidence in the fairness of assessments. (Yeadon et al., 2023; Currie et al., 2023). In addition, automated grading and feedback tools may introduce bias and lack transparency, which further complicates fairness and consistency (Swiecki et al., 2022). Moreover, GenAI tools challenge the validity of traditional evaluation methods, as AI-assisted work makes it harder to measure authentic student effort (Ali & Alhassan, 2021). These challenges highlight the need to rethink teaching strategies and redesign assessments to maintain academic integrity while making the most of GenAI's potential.

P1: GenAI tools hold considerable promise for enhancing personalization, inclusivity, and engagement in higher education; however, without clear pedagogical policies and robust safeguards, their implementation can weaken academic integrity, limit critical thinking, and compromise student learning.

In addition to their pedagogical impacts, GenAI tools also offer operational support to higher education institutions by making processes faster, smarter, and more scalable. Automated grading, scheduling, and feedback systems significantly reduce faculty workload and free up time for more student engagement (Jani et al., 2020). Virtual assistants and intelligent tutoring tools also streamline administrative tasks and provide real-time support for learners, including those with ADHD or other learning needs (Gamage et al., 2023). Furthermore, accessibility solutions convert text into audio or alternative formats to ensure that students with diverse learning styles can access course materials (Bharadwaj, 2025). At the institutional level, GenAI-powered analytics tools help optimize resource allocation and improve data-driven decision-making (University Canada West, 2025). Other tools, such as DeepSeek and Kudu, even generate instructional content and digitize resources to help institutions deliver high-quality lectures at scale without sacrificing responsiveness (Dutton, 2025). These systems allow higher education institutions to operate more efficiently while maintaining academic standards and improving student experience.

Despite its promise, integrating GenAI tools into higher education brings serious operational challenges. First, many faculty and students lack the training needed to use these tools effectively and ethically, which leads to uneven adoption and resistance to change (Chirumamilla & Sindre, 2021). Institutions also experience infrastructure-related issues due to limited funding, outdated IT systems, and unreliable data management, which make large-scale implementations difficult, especially for under-resourced campuses (EDUCAUSE, 2022). Privacy concerns introduce additional challenges, as GenAI-powered proctoring and monitoring systems often rely on facial recognition and behavioral tracking, which raise questions about surveillance and student rights (Sullivan et al., 2023). Moreover, algorithmic bias can impact grading, analytics, and decision-making, which undermines fairness and trust (Chan, 2023). The fast pace of innovation often leaves institutions struggling to update policies, systems, and staff skills. Without strong control, sufficient resources, and clear ethical guidelines, the risks of adopting GenAI tools could outweigh their potential benefits.

P2: GenAI tools enhance efficiency, scalability, and inclusivity in higher education by automating tasks, streamlining administration, and optimizing decision-making; however, uneven training, infrastructural limitations, privacy concerns, and algorithmic bias threaten their equitable and sustainable adoption.

The integration of GenAI tools into higher education decision-making promotes transparency, accountability, and ethical use. Many institutions establish AI ethics committees and update their policies to address fairness, beneficence, and clarity (Floridi, 2021; Miao et al., 2021). These efforts help them comply with regulations such as FERPA and maintain academic integrity with oversight mechanisms (U.S. Department of Education, 2023). GenAI tools also provide data-driven, actionable insights that guide policy updates, resource planning, and integrity checks that lead to more data-driven decision-making and support institutional credibility (Renda, 2020; Florida Tech, 2024).

Managing GenAI tools in higher education becomes challenging mainly due to fragmented policy responses and the lack of universally agreed ethical standards (Dexe & Franke, 2020; Chan, 2023). Many institutions struggle to create clear monitoring and regulating guidelines that balance innovation with accountability, especially when defining acceptable use of GenAI tools in academic contexts. Some institutions ban GenAI-generated submissions while others encourage broad adoption, which often creates confusion among faculty and students (Askew et al., 2024; Chan, 2023). Questions about transparency and accountability also remain unanswered, as regulations need to clarify how decisions made by GenAI tools are explained and assessed in educational environments (Pechenkina, 2023; D'Agostino, 2023; Dana et al., 2021; Anderson, 2023). It is essential to develop comprehensive governance frameworks that address trust, equity, and academic integrity.

> *P3: The rapid integration of GenAI tools in higher education requires adaptive governance frameworks with ethics committees, clear policies, and compliance mechanisms to ensure transparency, accountability, and academic integrity.*

When guided by human-centered principles, GenAI tools can be used to support equity, inclusion, and trust in higher education. If the governing policies are developed considering human rights, such as UNESCO's humanistic framework, they promote transparency and fairness while embedding ethical values like beneficence, justice, and explicability (Miao et al., 2021; Floridi, 2021). These approaches also align with the ICAI values of honesty, responsibility, and trust to reinforce integrity across diverse academic cultures (ICAI, 2021). In addition, structured frameworks, such as Adarkwah's (2024) GenAI Adult Learning Ecology, allow faculty and students to answer complex ethical questions with confidence. Beyond policies, GenAI tools reduce barriers with features such as multilingual feedback, text-to-speech conversion, and personalized support that help bridge linguistic and accessibility gaps to create more inclusive learning environments (Bin-Nashwan et al., 2023; Avello-Sáez & Estrada-Palavecino, 2023).

Without thoughtful design and oversight, however, GenAI tools can increase bias, inequity, and mistrust. The lack of algorithmic clarity may lead to systemic discrimination and challenge fairness in academic decision-making (Kasneci et al., 2023; Pechenkina, 2023). Overreliance on detection tools or AI-driven proctoring can minimize student autonomy (Chirumamilla & Sindre, 2021; Sullivan et al., 2023). Gaps in infrastructure, digital literacy, and affordability further restrict access, which creates significant barriers to equitable participation (EDUCAUSE, 2022; Schlachter et al., 2022). Generational differences in adoption also produce fragmented norms and confuse students and faculty about what constitutes acceptable use (Chan & Lee, 2023). Meanwhile, inconsistent or overly rigid institutional policies can polarize campus culture and lead to misuse rather than supporting ethical competence and shared responsibility (Anderson, 2023; Askew et al., 2024).

> *P4: GenAI tools have the potential to strengthen equity, accessibility, and trust in higher education when guided by human-centered governance; however, without careful oversight, they risk increasing bias, surveillance, and cultural inequities that undermine academic integrity and ethical credibility.*

In addition to addressing different perspectives of GenAI tools in higher education, the literature shows that those dimensions are closely interconnected. For example, the growing use of GenAI-powered paraphrasing and writing tools creates uncertainty in differentiating

legitimate learning support and academic misconduct. When institutional policies are underdeveloped, these tools create significant pedagogical risks (Avello-Sáez & Estrada-Palavecino, 2023; Yeadon et al., 2023). Similarly, contract cheating facilitated by GenAI tools is not only a pedagogical misuse but also an operational challenge, as institutions struggle with faculty training and user readiness (Ali & Alhassan, 2021; Alhammadi & Alhazmi, 2025). Ethical gaps, including unclear algorithms and embedded bias, further complicate governance and raise questions about fairness in assessment and access (Sun & Medaglia, 2019; Floridi, 2021). These multidimensional risks demonstrate that failures in policy and infrastructure directly challenge pedagogical integrity and compromise the ethical/cultural mission of higher education.

The literature also indicates that successful GenAI tool adoption requires coordinated efforts across all dimensions rather than fragmented approaches (Kasneci et al., 2023; Anderson, 2025). Research in institutional change shows that technology adoption usually moves through stages (Rogers, 2003; Atlas, 2023). Early stages involve ad hoc use by students and faculty, such as employing paraphrasing or content-generation tools without institutional oversight, whereas later stages involve comprehensive policy frameworks that minimize the ambiguity around academic integrity (Avello-Sáez & Estrada-Palavecino, 2023; Hammond et al., 2023; Stevens et al. 2024).

As institutions move forward, operational readiness becomes critical. Investments in infrastructure, data quality, and faculty training are essential to scale GenAI tools responsibly (Alhammadi & Alhazmi, 2025). At the same time, governance structures, including AI ethics committees and regulatory policies, provide accountability mechanisms to prevent misuse and mitigate bias. Ethical–cultural frameworks complement them by addressing equity, transparency, and trust to ensure that technological adoption aligns with academic values (Floridi, 2021; Miao et al., 2021).

> *P5a: GenAI tool adoption in higher education is multidimensional, where deficiencies in one dimension lead to risks in others, which emphasizes the need for coordinated and integrated strategies.*
>
> *P5b: Institutional maturity in GenAI tool adoption evolves gradually, where sustainable advancements depend on balanced progress across all dimensions to ensure that growth in one dimension does not overtake or challenge the others.*

Several frameworks have been developed to guide the implementation of GenAI tools in higher education that emphasize ethics, governance, and readiness. Floridi (2021) and Miao et al. (2021) emphasize principles such as transparency, justice, and accountability, while the U.S. Department of Education (2023) addresses compliance with regulations, including FERPA. Other frameworks focus on institutional readiness with factors such as funding, infrastructure, and training for effective integration (Alhammadi & Alhazmi, 2025). Adarkwah (2024) introduces a GenAI adult learning ecology that integrates curriculum, literacy, and ethics into adoption strategies.

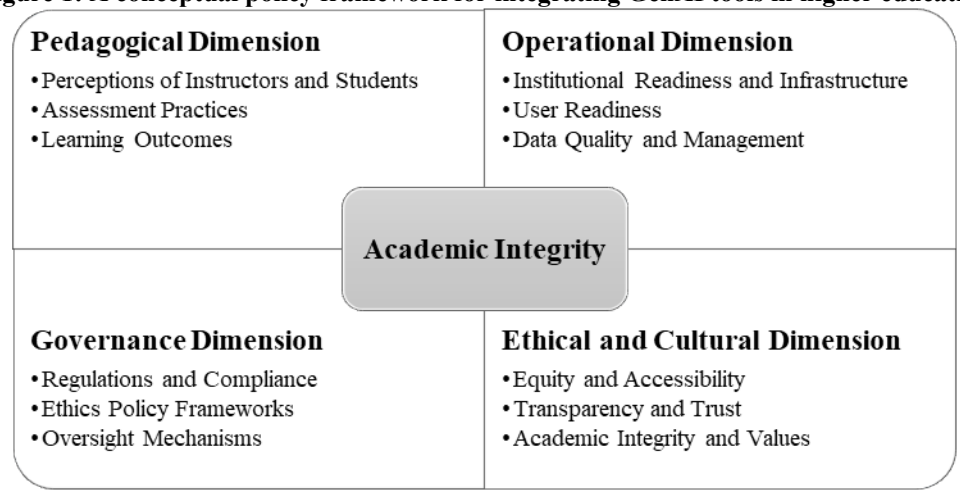
Despite these contributions, many existing frameworks have significant limitations when academic integrity is considered. Some lack actionable guidance for teaching, assessment, or authorship practices (Chan, 2023; Kasneci et al., 2023), while others address pedagogical, operational, or governance dimensions in isolation, without recognizing their interconnected nature (Anderson, 2023; EDUCAUSE, 2022). Only a few incorporate a maturity model to

explain how institutions move from ad-hoc experimentation to systematic, ethically governed adoption (Rogers, 2003; Atlas, 2023).

A CONCEPTUAL POLICY FRAMEWORK

As the literature reveals, prior approaches to GenAI adoption often treat pedagogical, operational, governance, and ethical considerations in isolation. Moreover, many of them overlook cultural values and fail to account for institutional maturity. To address these gaps, a multidimensional policy framework is proposed, which integrates these four dimensions and positions academic integrity at its center as depicted in Figure 1. The framework is adapted and enhanced from Alhammadi & Alhazmi (2025), Adarkwah (2024), Chan (2023), and Floridi (2021).

Figure 1: A conceptual policy framework for integrating GenAI tools in higher education



Pedagogical considerations focus on how GenAI tools reshape teaching and learning. For example, redesigning an essay assignment into a project-based assessment with an oral presentation helps ensure authentic student effort even with GenAI tools. The pedagogical dimension of the framework addresses changing perceptions among instructors and students (Pechenkina, 2023), redesigning assessments to promote authentic learning (Kasneci et al., 2023; Avello-Sáez & Estrada-Palavecino, 2023), and evaluating the impact of GenAI tools on learning outcomes, such as creativity and independent thinking (Atlas, 2023; Chan, 2023).

The operational dimension of the framework emphasizes institutional readiness and building robust infrastructure (EDUCAUSE, 2022; Alhammadi & Alhazmi, 2025), ensuring user preparedness by training (Chan, 2023; Chirumamilla & Sindre, 2021), and managing data securely, fairly, and without bias (Gamage et al., 2023; University Canada West, 2025). Instructors should complete GenAI literacy training, and the institutions should use licensed platforms as requirements for readiness.

The governance dimension of the framework not only sets adaptive policies but also includes mechanisms for periodic review as GenAI tools evolve. From that perspective, the dimension addresses clear policies and compliance mechanisms aligned with national and

international standards (U.S. Department of Education, 2023; Miao et al., 2021). It also emphasizes the need for ethics frameworks that balance innovation and accountability (Floridi, 2021; Miao et al., 2021), and for oversight structures such as AI ethics committees (Floridi, 2021; Askew et al., 2024).

Finally, the Ethical/Cultural dimension of the framework stresses equity and accessibility for all learners (Bin-Nashwan et al., 2023; Bharadwaj, 2025), transparency in algorithmic decision-making (Kasneci et al., 2023; Sun & Medaglia, 2019), and the integration of core academic values to maintain trust and integrity in an AI-driven environment (ICAI, 2021; Floridi, 2021). Institutions can promote transparency by requesting that vendors of GenAI tools provide reports to explain their algorithms. Table 1 summarizes these dimensions with their components.

Table 1: Framework dimensions with their components

Dimension	Component	Description
Pedagogical	Perceptions of Instructors and Students	How instructors and students perceive GenAI as either a tool for enhancing learning or as a threat to originality and academic integrity
	Assessment Practices	Redesigning evaluation methods to address plagiarism, contract cheating, and AI-assisted work while ensuring that assessments continue to foster critical thinking and authentic learning outcomes
	Learning Outcomes	Evaluating the impact of GenAI on creativity, independent thinking, and the authenticity of student work to safeguard educational quality
Operational	Institutional Readiness and Infrastructure	The availability of funding, robust IT systems, and reliable data management to support the large-scale and sustainable adoption of GenAI
	User Readiness	The degree to which faculty and students are trained and prepared to use GenAI tools effectively and ethically
	Data Quality and Management	Ensuring that data used or generated by GenAI systems is accurate, secure, unbiased, and trustworthy for analytics, personalization, and assessment
Governance	Regulations and Compliance	Development of institutional and national policies that align with standards such as FERPA and UNESCO's AI principles, emphasizing ethical literacy and adaptive regulation
	Ethics Policy Frameworks	The combined use of voluntary guidelines (soft) and enforceable mandates (hard) to balance innovation with accountability, mitigate risks, and promote ethical GenAI adoption
	Oversight Mechanisms	The establishment of AI ethics committees and monitoring bodies to ensure transparency, fairness, and accountability in policy enforcement
Ethical and Cultural	Equity and Accessibility	Promoting inclusive GenAI adoption by addressing barriers faced by multilingual learners, students with disabilities, and under-resourced institutions, while mitigating risks of bias and inequitable access
	Transparency and Trust	Ensuring explainability, fairness, and accountability in algorithmic decision-making to address bias, data security, and questions of authenticity
	Academic Integrity and Values	Embedding principles of honesty, responsibility, and justice into institutional practices to ensure that GenAI adoption aligns with academic values and upholds integrity

In order to complement existing frameworks, this framework places academic integrity at the center of all four dimensions. It acknowledges that academic integrity is not only a fundamental guiding principle but also a crucial metric for evaluating the responsible implementation of GenAI tools. To make this framework more actionable, an implementation model for GenAI adoption is conceptualized as a four-stage process, which allows higher education institutions to benchmark their current practices and plan for sustainable advancement. Moving from ad-hoc experimentation to adaptive and ethical transformation, each stage of the model addresses pedagogical practices, operational capacities, governance structures, and ethical-cultural orientations. Table 2 presents the conceptual model with illustrative sample cases.

Table 2: An implementation model for GenAI adoption

Stage 1: Ad-hoc Experimentation

- Pedagogical: Instructors and students experiment with GenAI tools informally without institutional guidance.
- Operational: Minimal infrastructure support; reliance on free/public tools.
- Governance: No formal policies; uncertainty about what constitutes acceptable use.
- Ethical/Cultural: Trust and equity concerns are unaddressed; risks of plagiarism and bias are unmanaged.

Sample: A department notices students using GenAI tools to draft essays. Without a shared policy or training, faculty responses vary; some ignore it, whereas others forbid it.

Stage 2: Structured Adoption

- Pedagogical: Early policies for classroom use and assessment adjustments.
- Operational: Partial training programs for faculty; pilot projects to evaluate tool effectiveness.
- Governance: Emerging guidelines, often fragmented across departments; reactive responses to misconduct.
- Ethical/Cultural: Limited discussion of inclusivity and fairness; initial recognition of bias and privacy issues.

Sample: A business college pilots an AI writing assistant tool for MBA students in some courses, with faculty guidance on acceptable use. Policies differ across courses, and the infrastructure remains limited.

Stage 3: Institutional Integration

- Pedagogical: Assessment redesign emphasizes authentic learning, creativity, and critical thinking; faculty development programs embed AI literacy.
- Operational: Investment in infrastructure, secure data systems, and institutionally licensed AI platforms.
- Governance: Comprehensive institutional frameworks and compliance mechanisms aligned with regulations.
- Ethical/Cultural: Explicit integration of academic integrity values; equity initiatives ensure accessibility across diverse learners.

Sample: A university licenses a secure GenAI platform for all departments. Faculty are trained in redesigning assessments, and an internal audit team reviews AI usage for compliance with privacy and equity standards

Stage 4: Adaptive and Ethical Transformation

- Pedagogical: GenAI seamlessly embedded into curricula as a learning partner; continuous innovation in instructional design.
- Operational: AI systems are adaptive, scalable, and integrated with broader institutional strategies.
- Governance: Dynamic oversight mechanisms ensure transparency, accountability, and adaptability.
- Ethical/Cultural: A culture of trust, inclusion, and shared responsibility; cross-cultural sensitivity and global ethical alignment are embedded.

Sample: A university integrates AI literacy into general education requirements. An interdisciplinary ethics committee oversees GenAI adoption, while policies require frequent audits. Students, faculty, and administrators co-create guidelines to develop a culture of trust and innovation.

PRACTICAL IMPLICATIONS

From a teaching and learning perspective, the framework encourages institutions to rethink how they design courses and assess student work. To enhance students' critical thinking and originality, institutions should consider alternative assessment methods such as project-based learning and oral exams that include iterative feedback to emphasize the learning process rather than the final product. Faculty development is also a key factor. Providing grants for curriculum redesign and offering GenAI literacy programs can allow educators to use innovative instructional methods while maintaining high standards of academic integrity. By teaching students to critically engage with GenAI-generated content, institutions can utilize these tools for a deeper learning experience.

The framework also emphasizes the importance of being prepared for a successful GenAI integration as it requires strong infrastructure, secure data systems, and adequate funding. It's not only about upgrading technology but also about equipping faculty and students with the skills to use GenAI tools ethically and effectively. Institutions should prioritize protecting student rights over efficiency while being mindful of data privacy and surveillance concerns. Continuous reviews and strategic partnerships with tech providers can help institutions innovate responsibly while ensuring inclusivity and sustainability.

Governance is the backbone of responsible GenAI use. The framework recommends forming interdisciplinary AI ethics committees to oversee transparency, compliance, and accountability. These committees can coordinate efforts across the institution to reduce policy gaps and ensure that regulations keep pace with technological change. Effective governance blends "soft ethics" (voluntary guidelines) with "hard ethics" (legal requirements) to provide a balance between flexibility and enforceability. Clear policies reduce risks like bias and misconduct and build trust in the institution's approach to GenAI.

Ethically and culturally, the framework addresses that GenAI adoption must be established in fairness, accessibility, and trust. While GenAI can improve access and inclusivity, limited resources and training may widen gaps. Institutions must ensure that GenAI use reflects values like honesty, justice, and responsibility. This means being transparent about how algorithms make decisions and involving diverse voices in developing GenAI policies. By aligning with global ethical standards, institutions can treat GenAI tools as a cultural shift toward more inclusive and equitable education.

Perhaps the most important takeaway is that progress in one area depends on the others. Institutional leaders need a holistic method when developing new pedagogical approaches or enforcing ethical standards. More than just a checklist, this framework is a guide for balancing innovation with accountability. When used thoughtfully, it can help ensure that GenAI tools strengthen the core mission of higher education.

FUTURE RESEARCH

The proposed framework offers several directions for future research to support its credibility, improve its structure, and expand its relevance across global contexts. Empirical validation studies with comparative case studies across institutions can be conducted to test the framework's adaptability. These studies would help reveal how cultural attitudes toward academic integrity shape policy outcomes and institutional practices. Additionally, institutional

audits, surveys, and focus groups would offer a better understanding of how GenAI tools are being adopted and what barriers institutions face in different settings.

It's also important to explore how different groups within higher education perceive GenAI tools. Faculty, student, and administrator views may vary widely, especially when it comes to questions of originality, authorship, and trust. Longitudinal studies could track how GenAI tools affect critical thinking, creativity, and academic performance over time. These insights would help address and fill a major gap in current research and explain how disciplinary differences influence acceptance or resistance to GenAI tools.

Managing the risks associated with GenAI tools is another area for exploration. Issues like algorithmic bias, transparency, and data governance are still evolving and require deeper investigation. Comparing national and institutional policy responses could reveal best practices for ethical governance. These findings could guide institutions in balancing innovation with safeguards that protect academic integrity and student rights.

Finally, future research should look at how institutions move from early experimentation with GenAI tools to more structured, ethically grounded adoption. Mapping this process can help identify which capacities, such as digital literacy, infrastructure, or ethics training, are most essential for long-term success. By studying this progression, researchers can validate the framework and contribute to the development of standards for responsible GenAI use.

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HOW TO USE GENERATIVE ARTIFICIAL INTELLIGENCE TO ENRICH AN EXPERIENTIAL LEARNING ACTIVITY IN A STRATEGIC MANAGEMENT COURSE

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ABSTRACT

Experiential learning activities are effective methods for fostering student engagement and creativity. Despite educators' enthusiasm for using these methods, they often face difficulties in designing them. To address this, the author explored the use of Generative Artificial Intelligence (Gen AI) to create a more complex and engaging experiential learning activity in a capstone strategic management course. In this paper, the author outlined the steps where she applied Gen AI, highlighted key conclusions, and discussed Gen AI's limitations in this context.

Key Words: Generative Artificial Intelligence, experiential learning activity, critical thinking.

INTRODUCTION

Case studies, simulations, and other active learning techniques are well established and widely used in management courses (Envick, 2023; Mello, 2024; Wright et al., 2024). Recently, experiential learning activities have gained more popularity because they allow students to use their critical thinking skills and apply course concepts to real-world management problems. Educators have grown increasingly concerned about how AI is affecting students' critical thinking skills. As students rely more on AI for assignments and other academic tasks, many educators have observed a decline in students' ability to think critically and engage deeply with course material. In response to these concerns, educators have begun exploring more dynamic and multifaceted learning activities that encourage deeper analysis and active problem-solving rather than passive reliance on AI tools. Experiential learning activities have taken on greater importance as a way to engage students actively and deepen their understanding. As Dietz and Keys (2023) suggested, educators can experiment with different AI tools and redesign assignments to emphasize the learning process rather than simply focusing on the final product. Similarly, Anthony et al. (2024) designed and implemented a short-form sprint, which was a focused, collaborative learning session aimed at rapid skill development, and found that students successfully applied various Gen AI tools to solve a real-world problem in a short period of time. Gayeski (2024) employed Gen AI to design a scenario-based assignment requiring students to create a comprehensive communication plan for diverse stakeholders and noted that Gen AI can be valuable in designing assignments that encourage students' curiosity and learning. Weiss

(2023) highlighted that Gen AI can support idea generation, including drafting syllabi, developing learning objectives, and adjusting difficulty levels for different student groups.

However, creating an experiential learning activity with real-world implications could be challenging (Gayeski, 2024). This semester, the author decided to experiment with Gen AI tools to modify her assignments in her capstone strategic management course. Business capstone courses are designed to integrate student learning and apply critical thinking across business functions (England, 2023). The author employed a variety of activities in her undergraduate capstone strategic management course, including case studies, role plays, and experiential learning activities. The author has been using an experiential learning activity called "Paper Clip Experiential Learning Activity". The initial activity was included in the instructor's manual of Dess et al. (2014) textbook. The author developed the activity over the years by adding more steps and components based on new materials and student feedback. This is a fun and engaging course-closing activity. It also provides students with a real-world experience in strategic decision-making. Students do the exercise after completing the course materials towards the end of the semester. After reading articles (e.g., Anthony et al., 2024; Gayeski, 2024; Weiss, 2023) and participating in several webinars on how to integrate Gen AI into teaching offered by McGraw-Hill and Harvard Business Publishing Education, the author wanted to try something new this semester. Educators have identified Gen AI's benefits, including enhancing student learning, developing innovative teaching materials, and providing feedback, and challenges resulting from using Gen AI in teaching such as the effectiveness of teaching, the accuracy of output of Gen AI, and deterioration of critical thinking (Larson et al., 2024). The author decided to utilize Gen AI for her "Paper Clip Experiential Learning Activity".

The original "Paper Clip Experiential Learning Activity" was a relatively simple exercise consisting of two main steps. Students were given a short scenario in which paper clip sales were declining, and the executive team was asked to generate innovative ideas for new products made from paper clips. Students worked in teams to develop product ideas and then presented them to the class. While the activity encouraged creativity, the structure of the exercise was fairly open-ended and limited primarily to idea generation and presentation.

The author used Gen AI to explore ways to expand and enrich the exercise and to see whether AI could add structure and new elements to the exercise. Gen AI contributed to the exercise in several ways. First, it generated more detailed, step-by-step guidance for the teams. In addition to idea generation, Gen AI suggested incorporating elements such as product design, branding, marketing strategy, and a more structured presentation format (e.g., pitching the idea, sketching the product, and explaining its value). These additions helped students think more holistically about innovation rather than focusing only on generating ideas. Second, Gen AI suggested framing the activity as a competition among teams, which introduced a motivational component that was not part of the original exercise. Based on this suggestion, the author informed students that a prize would be awarded to the winning team but kept the details of the prize a surprise until the end of the activity. This approach increased student engagement and sustained interest throughout the exercise. After the winners were announced, the author revealed that the prize consisted of extra participation points for the winning team. Third, Gen AI generated a rubric that could be used to evaluate the teams' ideas more systematically. This

provided clearer evaluation criteria for creativity, feasibility, and presentation quality, which were not explicitly defined in the original activity. Overall, the author used Gen AI not simply to replace existing ideas but to extend and refine an established experiential exercise. The process was also exploratory, as the author was interested in examining whether Gen AI could provide useful suggestions for enhancing classroom activities and increasing student engagement.

Overall, this paper contributes to the growing management education literature on AI by demonstrating how Gen AI can be used as a pedagogical design tool to enhance existing experiential learning activities.

LEARNING OBJECTIVES

The author added the following learning objectives:

After completing this exercise, students will be able to:

- Apply strategic management concepts (e.g., resources, capabilities, sustainability, societal impact, SWOT analysis) to real-world situations.
- Experience the role of a strategic decision maker.
- Understand industry competition and sources of competitive advantage.
- Analyze external environmental changes within a specific industry context.
- Foster student engagement and creativity at the end of the semester.

The author explained below how she modified the experiential learning activity with the help of Gen AI. Specifically, she used the free version of ChatGPT (GPT-4o) for this work. She chose this version over other Gen AI tools because the articles she cited also primarily employed ChatGPT, and she wanted to maintain consistency with her approach.

Although the author designed the prompts for the paper clip experiential activity, they can be easily adapted to other experiential learning exercises in other management classes such as organizational behavior, leadership, and entrepreneurship. Instructors can modify key elements of the prompt based on their learning objectives and concepts. They can utilize Gen AI as a tool to expand and refine their classroom exercises.

Step 1. Idea Generation and Presentation

The author uploaded her slides for the exercise and gave ChatGPT the following prompt:

"I teach an undergraduate management class. Can you make the attached exercise more interesting for students?" In response to this prompt, ChatGPT created the following instructions:

Your task: Transform an everyday object – the paper clip – into a new, exciting product! This challenge encourages you to think outside the box, using creativity and entrepreneurial skills to come up with something unique.

Instructions For Students:

1. **Create A New Product**:
   - Use a paper clip in new, imaginative ways to design a different product.
   - Your product should be distinct from traditional paper clip uses.
2. **Brand Your Product**:
   - Give your product an interesting name.
   - Create a catchy slogan that captures the product's unique selling point.
3. **Develop A Marketing Strategy**:
   - **Pricing**: Set a price for the product that fits its target market.
   - **Place**: Decide where you would sell the product (e.g., online, in stores, through pop-up events).
   - **Promotion**: Design a creative advertising plan. Think about where (social media, influencers, college events) and how (videos, posters, demos) to promote your product.
4. **Pitch Your Idea**:
   - Prepare a short pitch for your product (1-2 minutes per idea).
   - Describe why your product would appeal to consumers and how it stands out from the competition.
5. **Realism and Creativity**:
   - If possible, make a prototype (or sketch) of your product.
   - Think about any sustainability angles or social impact that could make your product more appealing.
6. **Presentation:**
   - Teams will present their product ideas to the class in a mini "Shark Tank" style session, where classmates can ask questions, give feedback, and vote on the most innovative idea.

Step 2. Choosing the Best Product

The author wrote the next prompt:
"Can you develop a rubric for students to vote?"

ChatGPT developed the following rubric based on the exercise.

Each criterion can be rated on a scale from 1 to 5, with 1 being "needs improvement" and 5 being "excellent." After all the presentations, students can total up the scores to help determine the most creative and marketable ideas.

Paper Clip Innovation Challenge Rubric

Criteria	Description	Score (1-5)
Creativity & Originality	How unique and innovative is the product idea? Does it demonstrate a fresh take on using a paper clip?	
Product Name & Slogan	Is the product name catchy and memorable? Does the slogan effectively capture the essence of the product and appeal to the target audience?	
Marketing Strategy	Are the pricing, placement, and promotion strategies appropriate and well-thought-out? Do they make sense for the target market?	
Presentation & Pitch	Was the presentation clear, engaging, and persuasive? Did the presenters explain the product's value and potential well?	
Practicality & Feasibility	Does the product seem realistic and feasible to make? Could it be practically implemented with available resources and technology?	
Visuals/Prototypes	Did the team provide visuals or prototypes that helped illustrate the product? Did they put in extra effort to show what the product would look like?	
Sustainability/Impact	Does the product consider sustainability, environmental, or social impact? Is there any positive impact the product could have beyond its primary use?	

Total Score: ___ / 35

The author found that ChatGPT completed her request quickly and did a great job with the rubric.

Her next prompt was "How can the instructor determine the winner?"

ChatGPT suggested the following steps for determining the winning team: (1) collect students' votes by using the total scores from each student's rubric to calculate an average score for each team's presentation; (2) calculate final scores by averaging the total rubric scores for each team; and (3) announce the winner based on the highest average score.

However, the author decided not to follow the full procedure suggested by ChatGPT during the class session. While the suggested process was systematic, implementing these calculations in real time during class was time-consuming. Instead, the author adopted a simpler and more practical approach. After each student calculated their total score using the rubric, the author wrote each team's name on the board and asked students to raise their hands if their score was highest for Team 1, Team 2, or Team 3. The team that received the most votes was announced as the winner. The prize consisted of extra participation points added to the winning team's course grade.

Step 3. Debriefing

This activity works well as a course-closing exercise in a strategic management class because it allows students to revisit and apply several concepts introduced throughout the

semester. To facilitate this, the author briefly framed the exercise within the context of a mature office-supplies industry that experiences declining demand due to digitalization. Students were asked to assume that they were part of the executive team of a paper clip manufacturing company seeking new growth opportunities.

During the debrief, the author guided students in connecting their ideas to strategic management frameworks. First, students discussed the external factors contributing to the decline in paper clip sales, such as technological change and declining demand for paper documents, which allowed them to reflect on elements of external environmental analysis. Second, students reflected on their proposed product ideas and identified potential strengths, weaknesses, opportunities, and threats, providing a simplified application of SWOT analysis. Third, the author encouraged teams to consider what resources and capabilities would be necessary to develop, produce, and market their proposed product, which introduced elements of internal analysis and value chain analysis. In addition, students were prompted to consider broader strategic issues such as sustainability and societal impact by discussing whether their product could be produced using environmentally friendly materials or designed for new socially relevant uses. Finally, the author facilitated a class discussion comparing different team strategies and highlighting how firms may pursue innovation, differentiation, or new market opportunities when facing industry decline. This discussion helped connect the exercise to broader strategic management concepts such as innovation, competitive positioning, and strategic decision-making.

Through this structured debrief discussion, the exercise helped reinforce key course concepts while also fostering student engagement and creativity. This exercise also helped students improve their critical thinking skills, which are necessary in a strategic management course. Furthermore, students were fully engaged with their team members and learned that they needed to rely on their team members for different skills such as sketching the prototype or pitching their ideas. They figured out that some team members were better at these skills than others.

After debriefing, the author solicited students' feedback. The students commented that they found the activity very fun and engaging. Even typically quiet students got involved and shared their ideas. They also noted that idea generation was the hardest part. Since students were not allowed to use laptops or phones, they had to rely on their brains for idea generation. Students found this very challenging in the beginning. After they started talking among themselves, they began coming up with ideas for the product. They were more comfortable with the next steps such as marketing their product, pricing it, etc. Students were very enthusiastic while presenting their product.

CONCLUSION

Experiential learning activities increase student engagement and deepen student learning. As educators, we can incorporate more experiential learning activities into our courses. The challenge is to find an activity that helps students apply course concepts and foster their critical thinking skills. The author harnessed Gen AI, and it helped her modify her experiential learning

activity remarkably. The author found several benefits of using Gen AI for her teaching. First, Gen AI helps make the activity more engaging. The activity included a competitive element, which immediately engaged the students. Second, Gen AI helped her make the experiential learning exercise more enjoyable and effective. It enriches student learning and critical thinking skills. She concluded that AI can be a valuable tool for improving teaching activities, adding more critical thinking elements, and developing rubrics.

Despite Gen AI's impressive capabilities, the author noted that it has limitations. First, Gen AI output requires careful consideration (Gayeski, 2024). For example, the author disagreed with Gen AI's suggestion for determining the winner. Although Gen AI can provide structured and detailed procedures, instructors may need to adapt or simplify these suggestions to fit time constraints and the dynamics of a live classroom. Second, Gen AI did not offer a time limit for each step, so the author added a time limit: 20-30 minutes for idea generation, 10 minutes for choosing the winner, and 10 minutes for debriefing.

In conclusion, it is important to recognize both the potential and the limitations of AI in supporting educators. This study illustrates how Gen AI can assist instructors in refining experiential learning activities, adding new elements, and generating new ideas while still requiring instructors' judgment and adaptation. Marr (2024) pointed out that the most successful professionals in the future would be those who can understand the opportunities and the risks posed by AI and decide when to utilize AI and when to rely on their own human capabilities. As educators, we should learn how to utilize AI as a powerful tool complementing our intellectual capabilities and use it strategically. As Larson et al. (2024) pointed out, we can better support students by reimagining and refining how they interact with Gen AI. Students should be encouraged to apply critical thinking skills when evaluating and interpreting Gen AI outputs, particularly about potential biases and inaccuracies.

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COACHING ONLINE STUDENT TEAM SIMULATION PERFORMANCE: ONE EXECUTIVE BRIEFING MAKES A DIFFERENCE

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ABSTRACT

This study investigates whether a single, well-timed coaching intervention, an executive briefing, can improve student team performance in an online strategy simulation. Grounded in cognitive load theory and problem-based learning, the intervention positions instructors as corporate executives and students as managers responsible for defending strategic decisions. Although prior research recommends multiple briefings during simulation play, this is difficult to implement in asynchronous online courses. This study instead tests a minimalist approach: one executive briefing delivered after practice rounds and before the formal simulation begins. Using archival data from 1,019 students across 398 teams in the Business Strategy Game, the research compares teams that received the executive briefing (EB) with those that did not (NEB). Performance was assessed using five indicators: earnings per share, return on equity, stock price, image rating, and credit rating. Results show that EB teams significantly outperformed NEB teams in aggregate financial outcomes, with improvements in earnings per share, return on equity, and stock price emerging by the fourth decision round and persisting throughout the simulation. The findings suggest that a single, strategically timed briefing can reduce cognitive load, strengthen motivation and self-efficacy, and enhance early decision-making, demonstrating that minimal instructor involvement can yield meaningful gains using simulations in asynchronous online courses.

Key Words: *Simulations, coaching, executive briefings, online students, strategic management*

INTRODUCTION

Simulation-based learning is a valuable educational tool in business higher education, providing students with a dynamic and practical learning environment. Most business simulations try to immerse students in realistic business scenarios that foster critical thinking, improve decision-making, and sharpen problem-solving skills (Teach and Murff, 2009). By simulating competitive markets or internal business functions, students better understand business functional area interdependencies and the implications of business decisions. Thus, simulations, especially strategy simulations, replicate real-world challenges, enabling students to test theories, evaluate outcomes, and adapt strategies without the risk of real-world

consequences. Simulations provide a platform for developing student leadership competencies, strategic thinking, and adaptability. All these are key attributes in today's rapidly changing business landscape, and with online simulations, students can benefit regardless of modality.

Investigating the instructional practices and educational interventions that can best support student simulation learning has become an increasingly important pedagogical research area. Faisal et al. (2022) argue that business simulations need to have instructor facilitation in order to promote learning. There are many ways that faculty can play a role in preparing and assisting student learning in a simulation experience. Scholtz and Hughes (2021) report nine major themes in their systematic review of business educator simulation research, (1) didactic interventions, (2) preparation activities, (3) prompting student reflection, (4) coaching and mentoring, (5) providing feedback/mentoring, (6) structuring teams, (7) assessments, (8) encouraging collaborative learning, and (9) fostering student engagement.

Scholtz and Hughes (2021, p. 1418) found coaching and mentoring to be "the most prevalent type of educator involvement" in business simulations. Coaching and mentoring in simulations can take different forms. These include: role playing (Hernández, et al., 2010; Scholtz and Hughes, 2021), addressing student anxiety about the simulation (Luke et al., 2023), ensuring a holistic, deeper analytical approach (Alpert, 1995; Cadotte and MacGuire, 2013), offering just-in-time instruction (Alpert, 1995; Bolton et al., 2019; Cadotte and MacGuire, 2013), and employing critical incidents in the simulation (Scholtz and Hughes, 2021). Bolton et al. (2019, p. 28) states that "students can be encouraged to view the instructor more as a 'coach' there to help them learn and succeed. The coach helps students understand the market, competitive dynamic, available strategic and tactical options, and tries to guide students to forecasting the implications of their various choices prior to making them." Coaching can orient and motivate students to greater success (Hernández et al., 2010) and have significant positive learning effects (Mayer, 2019) in the simulation.

An executive briefing is a specific business-oriented form of coaching (Cadotte and MacGuire, 2013). Strategy simulations are complex business simulations which require situation analysis, strategy selection, resource allocation, and evaluation of outcomes in preparation for future decisions. In these kinds of simulations, students assume the roles of business managers. During an executive briefing, the instructor acts as a corporate executive or board member. Students, acting as managers, present their situation analysis and justify company decisions during the meeting. This gives the instructor the opportunity to give feedback and coach students on their simulation decisions. There is scant empirical research on the use of this pedagogical approach, and to our knowledge, no research has been published on whether the approach impacts student simulation performance.

In addition, the limited research on executive briefings is based on face-to-face classes with coaching occurring alongside each decision round. The number and management of executive briefings is an important consideration. Cadotte and MacGuire (2013) created a system where student teams had an executive briefing with a business coach before every decision round. This employed a large number of graduate students and volunteers from the local business community. They had a well-developed coaching training system with a full weekend of workshops for new business coaches followed by extensive mentoring throughout their first

coaching experience. Many instructors do not have access to resources such as these. Instructors may also not have the time to train and develop new coaches.

Scheduling multiple executive briefings with online student teams adds another complication, especially for asynchronous online courses. The most cited reason for students choosing online learning options is existing work and family commitments (39%) (BestColleges, 2024). With students having these commitments and an expanding workload for faculty, trying to schedule an executive briefing with asynchronous online teams before every decision round easily becomes a scheduling nightmare. Many strategy simulations offer up to 10 rounds of simulation play.

The growth in online learning is considerable. According to the US Department of Education (2024), from 2012 to 2024 the percentage of US post-secondary students taking at least some distance education courses went from 25% to 54%. In 2024, 26% of US post-secondary students were enrolled exclusively in distance education modalities (US Department of Education, 2024). With these kinds of trends, simulation pedagogy research needs to think about the use of simulation coaching from the asynchronous online perspective. Instead of examining the maximum number of executive briefing sessions, our study considers executive briefing impact from the opposite direction, a minimalist approach. Our research explores whether the use of only one executive briefing makes a lasting difference in online student team strategy simulation performance. This original take on the use of executive briefings will be helpful to the growing number of faculty teaching asynchronous online courses and is unique in this research stream.

LITERATURE REVIEW

Simulations, a subset of educational computer games, are widely implemented across diverse disciplines such as medicine, science, technology, education, teacher preparation, and management as tools for developing domain-specific expertise (Chernikova et al., 2020b). Simulations are part of problem-based learning (PBL), an instructional approach that emphasizes collaborative inquiry, data-driven analysis, and skill acquisition through solving complex, authentic problems (Hmelo-Silver et al., 2007). In business strategy simulations, learners are tasked with optimizing key performance indicators (KPIs), which serve as the principal metrics of success. Meaningful learning in educational games occurs when students engage in the active selection of relevant information, organize this information into coherent cognitive structures, and then integrate these cognitive structures into existing schemas (Erhel & Jamet, 2019). Thus, in strategy simulations learners actively construct knowledge through the problem-solving process. Empirical evidence suggests that simulations are particularly effective in fostering higher-order problem-solving skills (Ke, 2011). By incorporating gamified elements within relatively realistic and interactive learning environments, simulations promote student cognitive engagement and facilitate meaningful learning outcomes (Davis et al., 2024).

Managing Student Cognitive Load During Simulations

One of the concerns in PBL is overwhelming students' ability to process information and make well-informed decisions. Business strategy simulations were designed to have face validity to encourage students to see simulations as similar to decision making in a real business, making them inherently complex (Teach & Murff, 2009). Business strategy simulations often have students making decisions that involve skills from multiple functional business areas (e.g., accounting, finance, human resource management, operations management, management information systems, logistics, marketing). In addition, business strategy simulations require that students learn the context and rules of the simulation while simultaneously trying to choose strategies and apply tactics to implement those strategies successfully. These kinds of decisions are at the top of Bloom's taxonomy (Teach & Murff, 2009) and thus may be a challenge for some students. Bitrián et al. (2020) found that while approximately 50% of business students did not perceive business simulations as highly challenging at the beginning of the simulation, over 75% thought the simulation was highly challenging at the end. Rogmans and Abraza's (2019) research showed that students preferred case studies to business simulations because of business simulation complexity. Simulations may pose challenging tasks that students can perform with external guidance but that they may not yet be able to complete independently.

Asynchronous online students could face more cognitive load challenges. Jenner et al. (2010) found that in-person student team strategy simulation performance was superior to online student team simulation performance. Online environments may create barriers for successful simulation performance. The lack of a physical instructor-student interface can mean that student struggles are more likely to be hidden. Hernández et al. (2010) state that online simulation instructors need to be proactive in communication with students because of the online communication barrier. In addition, many of the reasons why students need to be in an asynchronous online course (e.g., work or family obligations) can be significant distractions in the learning process (Gillet-Swan, 2017). Jeong and Hmelo-Silver (2010) note that without an instructor physically there to guide them, online students in PBL are required to contextualize, evaluate, extract, and integrate information mostly on their own. They found that students tended to skim resources for answers to specific questions rather than engage in full exploration of resources and deep processing. Leavy et al. (2022) found that fully online students desired greater clarity of instruction and support when doing PBL. Both Gillet-Swan (2017) and Jeong and Hmelo-Silver (2010) recommended additional scaffolding to address these demands on student cognitive load.

Scaffolding structures in problem-based learning offer learners the opportunity to engage with complex tasks that might otherwise exceed their current capabilities (Hmelo-Silver et al., 2007). Mayer's (2019) Cognitive Theory of Multimedia Learning posits that learning through educational computer games, like simulations, involves managing three distinct types of cognitive processing: (1) essential processing, which is required to understand the core material; (2) extraneous processing, which results from attention being diverted to irrelevant or distracting elements; and (3) generative processing, which involves organizing new information and

integrating it with prior knowledge. Collectively, these processes can place significant demands on working memory with its limited capacity (Van Merriënboer & Sweller, 2010). In PBL, effective scaffolding supports essential processing while minimizing extraneous processing in simulations. When working memory is not overwhelmed, generative processing, and thus meaningful learning in simulations can occur (Van Merriënboer & Sweller, 2010).

Cognitive load in strategy simulations becomes more manageable when faculty can offer structured support (Reid et al., 2003). This guidance is provided by instructors in the form of coaching, task organization, and strategic prompting, rather than the direct provision of solutions to students. There are multiple ways in which instructors can enhance essential processing. For example, they can make student thinking and strategies explicit by asking students to explain their reasoning for a decision (Hmelo-Silver et al., 2007) and provide just-in-time information explaining relevant issues and options (Cadotte & MacGuire, 2013). Task organization suggestions decrease extraneous processing by focusing students on their goals and highlighting crucial features of the decision-making process (Chernikova et al., 2020a).

Addressing Student Motivation and Anxiety about Simulations

Students may feel apprehensive about simulations for several reasons. First, simulations often require active participation and decision-making, which can create anxiety for students who are uncomfortable with uncertainty or who have a fear of making mistakes when it substantially affects their grade (Hernández-Lara & Serradell-López, 2018). This is particularly true in strategy simulations that mimic real-world scenarios where the consequences of the students' decisions are clearly reflected in KPIs. Additionally, students with limited prior experience or confidence, especially in the quantitative aspects of the strategy simulation, may feel overwhelmed (Vos, 2015). Technical issues and unfamiliarity with the simulation platform can further contribute to stress (Scholtz & Hughes, 2021). Social factors, such as the pressure to perform in front of peers or instructors, may also heighten apprehension, especially in group-based or competitive strategy simulations (Hernández-Lara & Serradell-López, 2018). Ultimately, while simulations can be powerful learning tools, they may pose psychological and cognitive barriers that educators should consider and address through appropriate scaffolding and support.

Gender may also play a role in student apprehension about simulations. Casile et al. (2021) reported that female students perceived themselves as significantly less prepared and exhibited lower confidence in their ability to engage with simulations and make decisions within them. The study also found that female students demonstrated lower initial motivation to participate in simulations, which may be attributed to the competitive nature often associated with such environments. While some research suggests that majority male teams have stronger business simulation performance in the beginning rounds (Apestiguia et al., 2012), Cook et al. (2024) found that all male teams had the worst simulation performance when measured cumulatively over 10 rounds and that gender diverse teams had the strongest performance.

Mayer (2019) notes that student motivation is a factor in student learning. Theories such as self-efficacy, intrinsic and extrinsic motivation, goal orientation, and attribution provide

insight into how instructor coaching can effectively motivate students to engage in learning (Davis et al., 2024; Mayer, 2019). Instructor coaching plays a critical role in enhancing student motivation and alleviating anxiety in simulation-based learning environments by fostering self-efficacy (Deitz et al., 2022). Through targeted guidance, feedback, and encouragement, instructors can bolster students' beliefs in their capacity to successfully navigate the simulation (Bandura, 1997). This reduces performance pressure and anxiety, creating a more supportive learning climate. Furthermore, instructor support can shape students' attributional interpretations of their successes and failures; by guiding learners to attribute outcomes to controllable factors such as effort and strategy use, rather than to fixed ability, instructors help mitigate feelings of helplessness and promote resilience. Collectively, these psychological supports enhance students' engagement with simulations and create conditions conducive to deeper learning and sustained motivation.

Executive Briefings as Coaching

Coaching is a just-in-time conversation in which the person acting as coach listens actively and asks open-ended, focused questions so that the person or group being coached can reach the goals they have set. Academic success coaching employs various types of coaching such as executive and leadership coaching (Robinson, 2015), peer coaching (Eriksen et al, 2020), metacognitive coaching (Chaplin, 2007), life/career coaching (Eriksen et al., 2020), and team coaching (Scholtz and Hughes, 2021).

Life coaching keeps the focus on higher order life decisions that students are making, and this type of coaching is often formally delivered through student success initiatives. Peer coaching typically involves coaching other students with the dual objectives of developing as coaches and facilitating the development of other students as leaders. Because student teams are concerned with strategizing and decision making, executive briefings utilize executive and leadership coaching, metacognitive coaching, and team coaching. Executive and leadership coaching is typically used for supporting an individual or team in making better and more strategic decisions. Metacognitive coaching is directed toward learning through improving students' reflection and engagement with course material to increase their awareness of their learning. Team coaching is centered on improving the cohesion, decision-making, and problem solving of a team that regularly works together.

Alpert (1995) outlines a standard executive briefing process for strategy simulations. Students begin by presenting a situation analysis grounded in industry data and market research, followed by a strategy proposal that aligns closely with their analysis. Cadotte (2022) emphasizes that students should be prepared to explain and support their analysis and strategy choice to generate a data-driven and disciplined approach to decision making. The preliminary analysis presentation should be informal and interactive, allowing the instructor, acting as the CEO, to interject with questions that prompt clarification, justification, and deeper thinking. In this way, the instructor helps teams frame the simulation problem (Riley et al., 2013). The goal is to ensure that student teams have thought through decision tradeoffs, potential options, and considered important issues (Lokhande et al., 2019). With students focused on their simulation

strategy, the executive briefing becomes an opportunity for coaching and mini-lectures on topics when students are receptive to the information. This immediate feedback focused on individual student team needs supports more effective and efficient learning (Cadotte, 2022). Instructors can also work with students on integrative teamwork issues if needed (Lokhande et al., 2019).

Cadotte and MacGuire (2013, p. 41) describe the role of the instructor during an executive briefing session as a "business coach."

> *The Business Coach's role during these meetings is to challenge the students' thinking and analysis by looking for inconsistencies and holes in logic, incompatibilities across functions, and various other problems and/or opportunities that the students might have overlooked. The Coach is instructed never to indicate the right decision to make, but to ensure that the students have considered the relevant issues, option and tradeoffs related to the strategic and tactical decisions.*

Executive briefings incorporate two commonly used scaffolding techniques from PBL scaffolding research: assigning roles and providing prompts. First, they assign roles to the participants which actively involves the students in their learning and motivates simulation interest (Chernikova et al., 2020a). Second, asking students to explain their decision-making process is a self-explanation prompt. Chernikova et al. (2020b) showed that this kind of prompting is particularly effective for learners with low levels of experience, such as undergraduates.

Leemkuil and De Jong (2012) further argue that learners often fail to fully explore simulation environments and miss key pieces of information. A discussion between instructor (as executive) and student teams (as business managers) provides an opportunity for interpretive support, which gives important background information that may be missing, helps students focus on important variables, and provides an opportunity for formative assessment (Leemkuil & De Jong, 2012; Reid et al., 2003). In addition, students may have difficulty in keeping track of the many sources of information in the simulation. An executive briefing session as outlined above assists in mitigating these issues through the role of the business coach. Cadotte and MacGuire (2013) found that students viewed executive briefings with business coaches as mostly positive, especially helping with motivation and decision-making. Other research found executive briefings led to improvements in student verbal communication (Lokhande, 2019) and overall business acumen (Lokhande, 2019; Riley 2013).

We chose to focus on the impact of a single executive briefing on student team simulation performance. The timing of the executive briefing may matter. Cook and Wilson (2024) suggest that when student teams perform better in early simulation rounds this builds student team competence and self-efficacy leading to higher student engagement, better early investment choices, and stronger strategy decision making. Hernández-Lara and Serradell-López (2018) found that the main obstacle to student learning in business simulations was demotivation from poor simulation performance. Simulation studies from the pandemic era examining best practices for instructors moving from face-to-face to synchronous online courses emphasized the importance of early round instructor/student interaction (Chasteen, 2022; Szot, 2022). This research suggests that an earlier executive briefing would have the strongest effect on online student team simulation performance.

Considering the entirety of above, we present the following hypothesis.

Hypothesis: Student teams who have an executive briefing before the simulation starts (EB) will have higher simulation firm performance than student teams who do not (NEB).

METHOD

This research was conducted following the delivery of a simulation in multiple online, asynchronous strategic management capstone classes. The simulation was chosen as the method for translating theory into practice based on previous publications in management research that suggests simulations are superior to other education and training strategies (e.g., Cadotte, 2016; Farashahi, and Tajeddin, 2018; Salas, Wildman, and Piccolo, 2009; Tompson and Dass, 2000) or equal to the case method (Mitchell, 2004). The Business Strategy Game (Thompson, et al., 2019) is a popular strategy simulation that was chosen for this study due to its complexity and accuracy in simulating a global manufacturing company with integrated distribution and sales.

Data Collection Procedure

The authors were granted Institutional Review Board (IRB) approval to analyze ex post facto simulation data from software archives. The archives included data for multiple academic terms in a four-year period. Data were aggregated to the group, sorted, and analyzed after students had graduated and left the university. No identifying information is reported. Sample size was determined by using an *a priori* power analysis to determine the necessary sample size to detect a small effect size ($d = .2$) with an alpha level of $\alpha = .01$ and 95% power. The analysis indicated a minimum required sample size of N = 93 cases.

Student teams had been randomly created using the team generator in the learning management system. Team size ranged from individual students to 5-person teams. There were 398 teams overall. Of those, 203 teams received an executive briefing at the start of the simulation and 195 teams did not. As the authors had over double the necessary N, and as an N of 200 is the typical "rule of thumb" in management research, it was decided to include all the experimental cases.

Sample

Approximately one half (203) of the teams were in class sections that included an executive briefing (experimental group), and the other half (195) were in sections taught without the executive briefing (control group). The average class size was 40 students, and all classes were taught online and asynchronously by the same instructor over a period of four years. The students were business majors and were enrolled at an AACSB-accredited, public university in the western United States.

Students in the executive briefing group met in teams virtually with the instructor after the two practice rounds and prior to the start of the simulation. In the executive briefings, students were required to share their intended strategy and their plans for the first decision round's decisions. The executive briefing asked students to prepare their plans for their company

including their company's strategy, expansion plans (if any), mission and vision statements, marketing plans, financing plans, production plans, compensation decisions, and corporate social responsibility investments (if any). During the EB, students were asked questions on their intended strategies and their supporting objectives and tactics. The control group did not meet with the instructor prior to the start of the simulation, though they were informed that they were welcome to do so. All students were able to meet virtually with the instructor at any point during the simulation for assistance in aligning decisions with the annual market outcomes. All other components of the class were the same.

Simulation

The simulation is competitive in that each company within an industry competes against the other companies in that industry. The simulation begins with two practice rounds. Once the practice rounds are complete, the data is deleted and the simulation resets. For the executive briefing group, the students met with a faculty member after the practice rounds and before the actual simulation began. Following the practice rounds and the simulation reset, there are 10 decision rounds starting in year 11 and completing with the 20th year of business. The teams are responsible for all decisions, and each decision deadline accounts for one year of business.

The simulation setting is a global athletic shoe company in which students make decisions regarding manufacturing including facility purchase and expansion, what equipment they need to purchase, and how to compensate the manufacturing workforce. They also make decisions for distribution, warehousing, marketing, financing, and corporate social responsibility initiatives. Students make annual decisions for the business once or twice a week. The companies operate globally in up to twelve market segments, and they all begin at the start of the 11th year of business at the same, financially sound starting point. The simulation results account for 30% of the grade in the class, and the final game-to-date score on the simulation is used for the simulation grade.

Student teams are instructed that the board of directors expects them to annually increase earnings per share and stock prices, maintain or increase return on equity, maintain or increase their credit rating, and achieve an image rating of 80 or better. The image rating is an indirect measure of corporate social investment, and it is comprised of the quality of their shoes in each of the geographic regions, the company's market share in each region, and any corporate social responsibility investments maintained over a four-to-five-year span. Simulation scores are calculated based on how closely companies met the investor expectation targets and how well they performed in comparison to the top company in the industry. At the end of each decision round (year of business), teams are provided with financial performance information for their company and those of their competitors as well as how they ranked within the industry.

In the simulation, students apply their understanding of strategic management and are acting as executives of their respective companies. The typical business KPIs of earnings per share (EPS), return on equity (ROE), stock price, image rating (corporate reputation), and credit rating are used to calculate scores and rank the companies with each decision round. Student learning was operationalized via the outcome measures of the five target KPIs of the simulation

for year 20, which is the final decision round of the simulation. These performance indicators provide an indication of student learning of the core concepts in strategy such as effective strategic choice, external and internal assessment, and appropriate governance.

The image rating is a composite of a number of items such as the quality of the shoes, market share in each region, and corporate social responsibility investments. The highest score possible on image rating is 100. Credit rating in the simulation is indicated by a letter grade. To include it in the analysis, credit rating was transformed to a percentage such that A+ = 100, A = 95, A- = 93, B+ = 87, B = 85, B- = 83, C+ = 77, C = 75, C- = 73.

RESULTS

Table 1 shows means, standard deviations, and correlations for study variables. The number of team members was not significantly correlated with the aggregate outcome variable, and as such, the number of team members was not included in further analyses as a control variable.

Table 1
Means, Standard Deviations, and Correlations

	M	SD	1.	2.	3.	4.	5.	6.	7.	8.
1. Exec Briefing	.51	.50	--							
2. EPS	10.90	8.52	.15**	--						
3. ROE	21.53	14.79	.13**	.77**	--					
4. Stock price	197.35	198.44	.18**	.97**	.73**	--				
5. Image rating	74.41	17.91	.03	.69**	.59**	.68**	--			
6. Credit rating	8.20	1.72	-.02	.28**	.28**	.24**	.19**	--		
7. Group Size	2.57	1.28	-.03	.01	.11*	-.00	.19**	-.00	--	
8. Agg Outcome	62.48	46.17	.17**	.97**	.77**	.99**	.72**	.25**	.02	--

** Significant at .01 (one-tailed)
*Significant at .05 (one-tailed)

EPS, ROE, and stock price were significantly and positively correlated with receiving the executive briefing, supporting Hypothesis 1. Due to the high correlations among the dependent variables, we conducted principal components factor analysis with varimax rotation. One factor emerged. All factor loadings were greater than 0.4, which are considered stable (Guadagnoli &

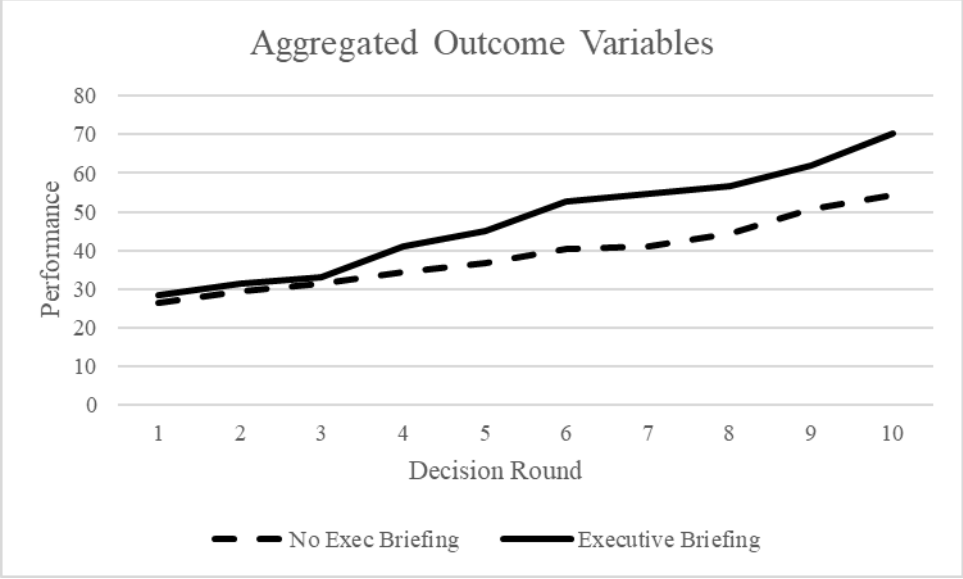
Velicer, 1988), and as such, we aggregated the outcome variables to one variable for hypothesis testing.

The hypothesis was tested using OLS regression. The aggregate financial outcome was significantly related to student teams having the executive briefing (R^2 = .03, F(1, 396) = 11.88, p.<.001). This indicates that one executive briefing held prior to the start of the simulation is significantly and positively related to simulation outcomes.

Post-hoc Analyses

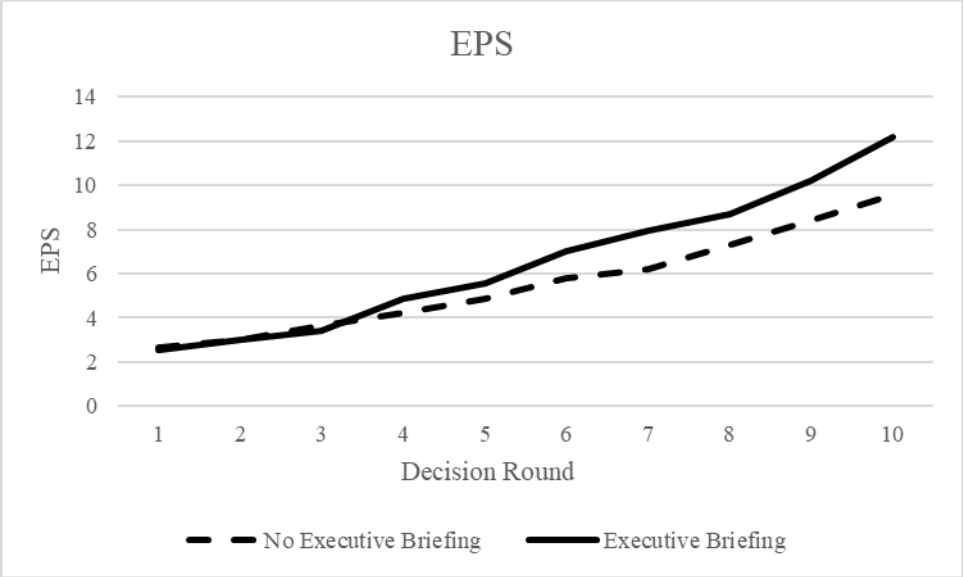
We were interested in where the deviation occurred between the two groups, so we conducted t-tests for each year of the simulation for the aggregate variable and then for each of the outcome variables. An independent samples t-test for the aggregated outcome variable found a significant difference starting in round 4 between NEB groups (*M* = 34.35, *SD* = 14.71) and EB groups (*M* = 41.23, *SD* = 24.71), *t*(396) = -3.35, *p* < .001. The difference continued throughout the remainder of the simulation with a slight dip in significance in round 9 between NEB groups (*M* = 50.68, *SD* = 31.20) and EB groups (*M* = 61.88, *SD* = 48.65), *t*(396) = -2.72, *p* = .007. See Figure 1.

Figure 1



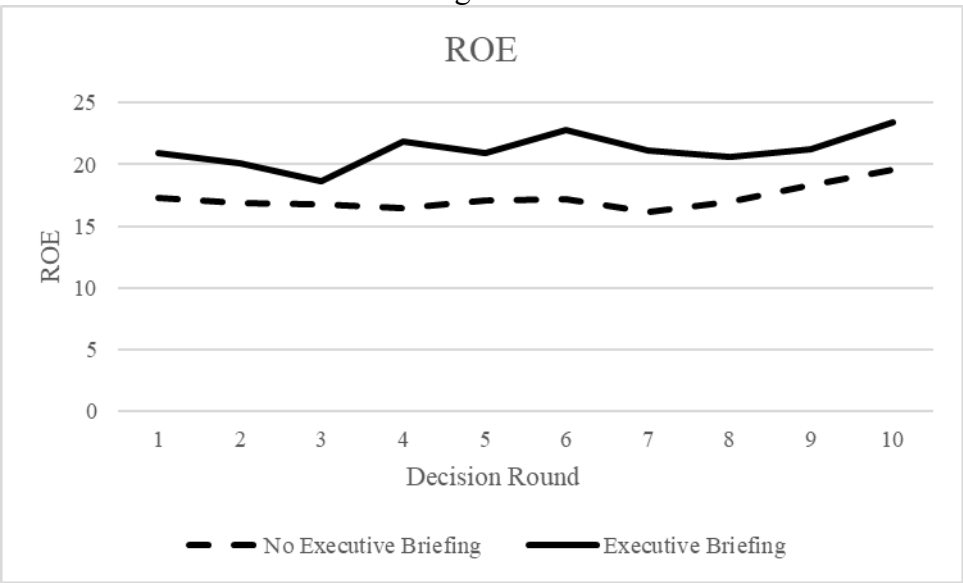
Starting in round 4, the difference in EPS between NEB groups (*M* = 4.21, *SD* = 2.44) and EB groups (*M* = 4.86, *SD* = 3.38), *t*(396) = -2.19, *p* = .029 became significant and remained significant throughout the remainder of the simulation. See Figure 2.

Figure 2



ROE was immediately significantly different in round 1 between NEB groups (M = 17.33, SD = 6.42) and EB groups (M = 20.88, SD = 8.51), $t(396) = -4.69$, $p < .001$. In round 5, the difference dropped slightly $t(396) = -2.79$, $p = .006$, yet remained significant throughout the remainder of the simulation. See Figure 3.

Figure 3



Stock price became significantly different in round 4 between NEB groups (M = 68.79, SD = 55.05) and EB groups (M = 97.43, SD = 97.47), $t(396) = -3.59$, $p < .001$ and remained significant throughout the remainder of the simulation. See Figure 4.

Figure 4

In round 2, credit rating was significantly different for NEB groups (M = 6.15, SD = 2.23) and EB groups (M = 5.37, SD = 2.22), $t(396) = 3.495$, $p < .001$. This trend continued into round 3 for NEB groups (M = 6.55, SD = 2.29) and EB groups (M = 5.53, SD = 2.42), $t(396) = 4.313$, $p < .001$. By round 4, the significance level dropped, and in round 6, there was no longer a significant difference between the two groups. The direction of the relationship is interesting in that the NEB groups achieved higher credit ratings than the EB groups. See Figure 5.

Figure 5

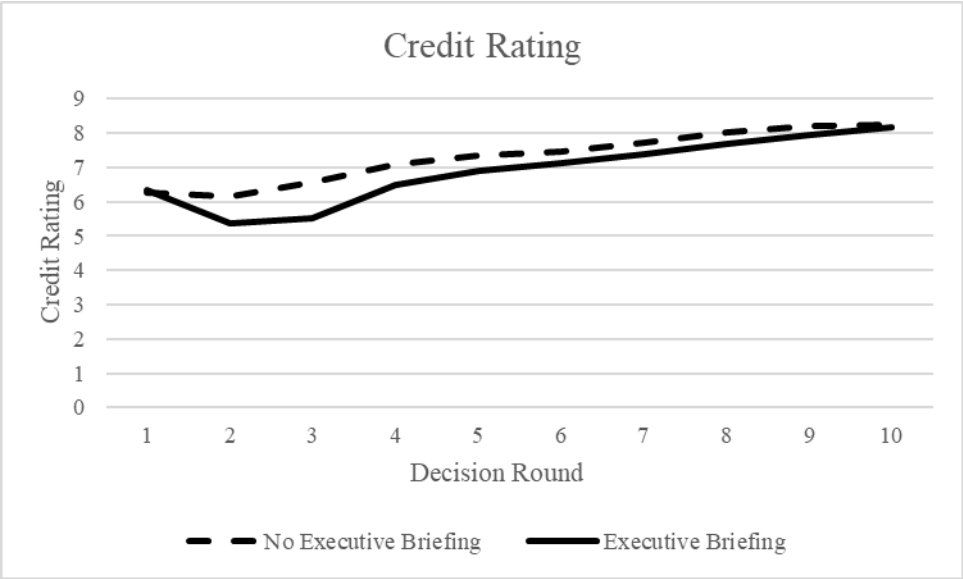
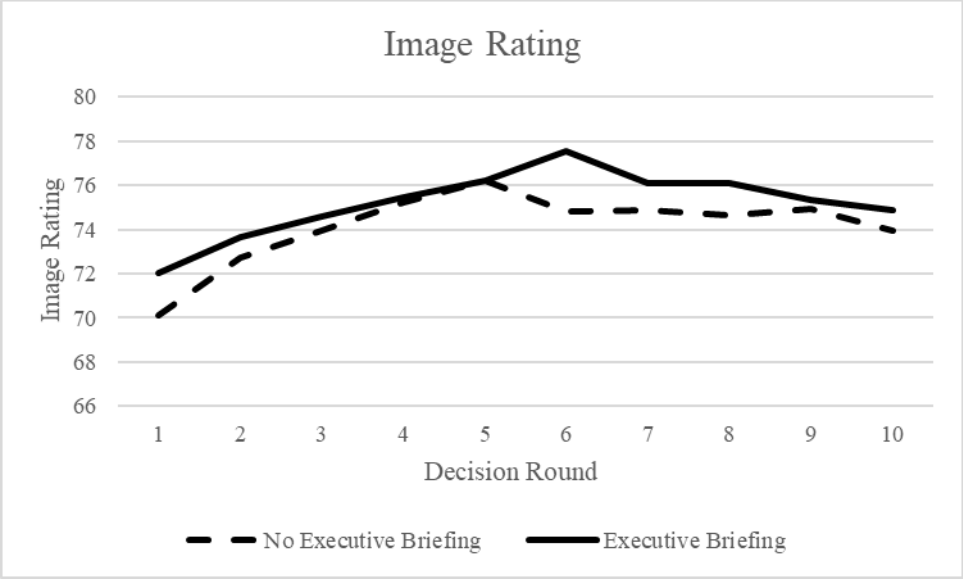


Image rating between NEB groups (M = 70.10, SD = 8.70) and EB groups (M = 72.01, SD = 9.74) was significantly different only in round 1, $t(396) = -2.06$, $p = .04$. After round 1, there was no significant difference between the two groups. See Figure 6.

Figure 6



DISCUSSION

The results support the hypothesis that EB student teams outperform NEB student teams in simulation results. While previous studies have shown general positive effects of executive briefings on student learning, ours is the first study that shows the significant positive effect of an executive briefing on simulation results. The mean scores of the aggregated performance indicators in Figure 1 show that both groups of student teams initially start off at similar levels. The EB teams begin to surpass the NEB teams by the second round of the simulation and achieve significantly greater performance by the fourth decision round. NEB teams improve their performance in the second half of simulation play, but they never catch up to the performance levels of the EB teams.

Strategic management simulations are complex and require an understanding of the core functional areas of management in order to make good strategic decisions. This level of difficulty brings with it an increase in cognitive load for students. In recognition of this complexity, previous simulation pedagogy research advocated executive briefings before every decision round. Our results suggest that this level of PBL scaffolding support may not be necessary with simulations. Our study shows that just one executive briefing prior to starting simulation decision rounds has a lasting impact on online student team results.

Executive Briefing Timing Effects

Our study extends the simulation pedagogy research stream by adding an executive briefing timing element. Simulation complexity means that students are likely to be particularly overwhelmed at the beginning of simulations. Student teams have to understand the simulation context, choose an initial strategy, and try to implement that strategy. In preparation for the executive briefing, students were asked to think about the goals they had for their businesses and how they would like to achieve them. In the executive briefing, students were again directed, through the use of coaching questions, to clarify any areas where the strategy, objectives, and plans were not actionable. The executive briefing provided them with a starting point for success via a lengthy process of strategizing both before and during the meeting with the professor.

For these reasons, having coaching at the beginning of the simulation could mean that students were able to make better strategic choices earlier on in the simulation. For example, investment choices in research and development, productive capacity, or advertising when matched with the appropriate strategy can pay off in better financial performance in later rounds. This does require that student teams clearly identify a strategy and then make the appropriate tactical choices to implement the strategy. Coaching should help less experienced students, like undergraduates, think more clearly about their choices and the tradeoffs inherent in a strategy simulation. Chernikova et al. (2020b) found that coaching-type prompts had stronger positive effects for less experienced students. Parnell and Crandell (2021) observe that student teams with clear strategies and good investment choices in the early rounds tend to see these pay off in the middle and later simulation rounds. This helps explain the pattern of results in Figure 1.

Another likely timing effect of the early executive briefing was in student motivation. Previous studies have suggested that managing student cognitive load and anxiety about the simulation has a significant positive effect on student learning (Dietz et al, 2022). As executive briefings are a form of problem-solving scaffolding and coaching, theoretically an executive briefing should reduce EB team working memory load. By providing students with direct access to the professor as executive coach, students were able to gain self-efficacy regarding the simulation. Students who were uncomfortable with uncertainty or who have a fear of making mistakes when it substantially affects their grade (Hernández-Lara & Serradell-López, 2018) received support and a clear direction forward for their performance. Students also became familiar with the simulation platform through the practice rounds and any questions that remained were covered during the executive briefing, reducing any stress due to unfamiliarity with the simulation.

Well-designed scaffolding, like an early executive briefing, minimizes distractions and supports key concepts, allowing students to devote more cognitive resources to applying concepts and achieving superior simulation financial performance. EB team early round strategic accomplishments likely decreased student team performance anxiety and heightened their feelings of self-efficacy and motivation. Strong early performance fosters greater student engagement and motivation, which in turn contributes to continued success in later simulation rounds. EB teams may also have sought out instructor assistance more during simulation play because they had established an initial connection with the instructor as a simulation consultant. EB teams might have felt more comfortable in requesting assistance than NEB teams who had not had this experience. In this way, stronger early round simulation success and connection motivates students to strive for higher simulation results in later rounds. Our study suggests that better early cognitive load management in PBL through stress reduction and strategy implementation is key to simulation success. This adds to a small but growing research stream that indicates that timing of faculty interventions in simulation pedagogy can have lasting effects on student learning (Cook and Wilson, 2024).

Executive Briefings, Investment Choice, and KPI metrics

A closer examination of the simulation performance measures suggests EB student teams performed better with financial investments. Post-hoc analysis demonstrates that by at least the 4th decision round, EB teams were seeing significantly stronger results on EPS, stock price, and ROE. One of the most common discussions in the executive briefings was the importance of financial and growth management. This is not unusual. Students often struggle with financial analysis in simulations (Teach and Murff, 2009). Vos (2015) found that students' weak financial knowledge had the biggest negative impact on simulation results. In addition, students bring their own experiences to the simulation. Many students have negative experiences or have a fear of going into debt and are wary of using debt in the simulation. In the corporate world, financing is usually necessary to fund growth. The executive briefing at the beginning of the simulation becomes an opportunity for debt-anxious students to understand the role of corporate debt in funding strategic growth investment. Coaching likely made EB teams more accepting of higher

debt ratios to fully fund their strategic choices earlier in the simulation. This helps explain the pattern seen in Figure 5. In the early stages, NEB student teams have significantly higher credit ratings than EB teams because they have lower debt ratios. NEB teams look like they are doing significantly better on this single performance measure, but they are likely not investing as much to support future revenue growth. By the middle decision rounds, the difference vanishes. This pattern may occur because by middle simulation rounds EB teams' investment choices lead to stronger financial results which then outweigh the negative drag of higher initial debt loads. EB student team investments paid off in the form of significantly stronger financial KPIs**.** Better financial investment in earlier rounds meant EB teams were significantly better prepared to profitably grow their companies over time. Given that financial analysis is a general weakness in student preparation, our study finds that instructor financial investment management coaching helps strengthen team performance.

In post-hoc analysis, image rating is the one KPI where a positive significant difference between EB and NEB teams was only found in one simulation round. The fact that the lone non-financial firm performance image rating score is only significant for one decision round is interesting, however, not a surprise in this simulation. Image rating is calculated using multiple measures: quality of their shoes, market share, and any CSR investments maintained over a four-to-five-year span. The choice of strategy can have an impact on image rating. If, for example, a student team chose a low-cost leader strategy, the quality of their shoes would be lower, thus lowering their image rating. If a team chose a focus strategy with high quality, the market share and their image rating would be lower. Our experience is that student teams tend to struggle most with this performance indicator. It may represent a level of cognitive complexity that is difficult for students to manage given the rest of the simulation. Additionally, student companies only need to meet the image rating target rather than continue to improve as they would if it were a financial measure. Once they reach an image rating of 100, they cannot improve the score beyond that. They start the simulation at the target of 70 and need to raise that rating to 80 by the end of the simulation. In Figure 6, image rating scores begin to decline in the second half of the simulation. Any investment in CSR also means less financial investment in the company. We believe the reason for this is that teams are working to improve their financial targets, and in so doing, they are investing less in corporate social responsibility. In summary, the differing pattern of results for the image rating KPI is likely a result of the interaction between student team strategy choice and the way this KPI is incorporated into the simulation.

Theory and Practice

Simulations typically claim that the professor need not intervene other than to give feedback from time to time. On the other hand, Teach and Murff (2009) argue that having student teams floundering through the entire simulation is a common experience. This kind of experience may be even worse for online students who report feeling more isolated than on-campus students (Leavy et al., 2022). Yet, trying to combat the isolation with multiple executive briefing sessions scheduled over the course of a term can be onerous for faculty and students. With one executive briefing, we were able to see an improvement in their performance outcomes

by providing students with the scaffolding needed to engage with complex tasks (Hmelo-Silver et al., 2007), decrease extraneous processing, and highlight crucial features of the decision-making process (Chernikova et al., 2020a). This study shows that a single executive briefing session before simulation play begins leads to stronger student team simulation performance throughout the simulation and suggests that multiple sessions may not be necessary to give online student teams the support that they need to be successful.

Key takeaways for instructors include the importance of delivering the executive briefing early to support stronger strategy implementation in simulation play. Emphasizing financial management, particularly the strategic use of debt to fund growth aligned with students' chosen strategies, helps guide student team investment decisions early in the simulation and allows them to capitalize on growth opportunities. This early preparation promotes stronger performance in the opening simulation rounds, which in turn reduces student anxiety and boosts motivation and engagement throughout the simulation.

LIMITATIONS AND FUTURE RESEARCH

This research is a pilot study examining the effect of a single executive briefing session on student team simulation results. While the results suggest a positive, lasting effect, there are limitations with generalizing the study's conclusions.

Sample

The study was conducted at a single institution with asynchronous online students. In addition, many of the online students were working, non-traditional students. The same effects may not be seen in more traditional students, synchronous online students, or students in on-campus courses. Another caution is that this is the first study to examine the effect of executive briefings on simulation results. Additional studies in other institutions with different student populations would be beneficial. The sample size provided the needed power to analyze the relationship between the EB and NEB teams, however, a larger sample size could provide researchers with a clearer pattern of the relationship. We recommend that instructors across institutions combine data to increase the N and minimize the limitations that can come with a smaller sample size.

Research design

Our research design deliberately took a minimalist approach to executive briefing instructional intervention in order to contrast with previous work. We only looked at the effects of one executive briefing and placed that briefing before actual decision rounds. It would be interesting to see the simulation performance impact of additional executive briefings. Given time stress issues for online students and faculty, determining the optimal number of executive briefings would be particularly valuable. The timing of additional executive briefings is another area worthy of exploration. Previous research on executive briefings found that student reflection on their decision-making processes was a key part of the executive briefing and student learning

(Alpert, 1995; Cadotte & MacGuire, 2013). Our study's executive briefing occurred after the two practice rounds had been reset and before the simulation started. This may have limited student team decision-making reflection because students were able to redo decision making immediately without suffering the consequences of previous round mistakes. In addition, students may have been focusing on learning how the simulation works rather than trying out different strategies. It may be that a single executive briefing later in the simulation would have a stronger impact because it would be more able to incorporate reflective aspects in the executive briefing.

Methodology

To achieve a sufficient sample size, this study examined student team performance within a single business strategy simulation. While the Business Strategy Game (BSG) is a widely used and well-established management simulation, numerous alternative strategy simulations exist across business disciplines, and results may differ in those contexts. The choice of simulation also necessarily shaped the student team performance measures available for analysis. Notably, slightly different performance patterns emerged across the measures examined, suggesting that outcome metrics influence observed effects. Consequently, the findings may not fully generalize to other simulations that employ different performance indicators, which may provide stronger or different insights into the effects of executive briefings.

Additionally, these classes were taught by one instructor who is a trained executive coach over multiple academic terms over a four-year period. While the multiple assessments support the strength of the methodology, we do see the single professor as a potential limitation, and we recommend that instructors become familiar with the basics of coaching prior to engaging in an executive briefing with students.

CONCLUSION

This analysis shows that a single executive briefing conducted before simulation play has a positive, persistent effect on online student team simulation performance. Our minimalist approach to executive briefings found significant, positive simulation performance effects by the simulation midpoint. Those results continued until the end of the simulation. Previous research had only considered the use of executive briefings before every decision round and had not shown an impact on simulation results. Our study is the first to show that an executive briefing improves student team simulation performance. The research shows that time-constrained instructors can see positive simulation learning effects with a single, early executive briefing. This allows online students and instructors to focus their limited time on a productive approach to supporting student learning in simulations. Beyond its practical implications for instruction, the study contributes theoretically by extending research on scaffolding and cognitive load in PBL environments, showing that an early instructional intervention can shape strategic decision making and simulation performance over time. To our knowledge, this is the first study to empirically establish that executive briefings influence student outcomes in team-based

simulations and that such effects persist without repeated intervention before every decision round.

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A REVIEW OF BEING A DEPARTMENT CHAIR: ESSENTIAL ROLES, RESPONSIBILITIES, AND SKILLS

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ABSTRACT

The role of department chair is multifaceted, encompassing developing the department while maintaining relationships with various stakeholders. Due to the chair's role's ambiguous nature, they are often scrutinized, with stakeholders having little understanding of what the role entails. The objective of this study is to identify and discuss the various roles, responsibilities, and skills required of the department chair to provide a greater understanding of the role. This is done through discussion on the chair's relationship with stakeholders, the characteristics a chair possesses, and the sources of stress and success. The paper concludes with implications of the findings for both the department chair and the stakeholders who interact with them, and with future research suggestions to further understand stakeholder relationships.

Keywords: *Academic Department Chair, stakeholder relationships, roles, responsibilities, skills, characteristics*

INTRODUCTION

An academic department chair has a vital role within universities that is complex, challenging, and ever changing with the higher education environment (Freeman et al, 2020; Gigliotti, 2021. Gmelch, 2015; Tietjen-Smith et al, 2020; Weaver et al, 2019; Gonaim, 2016) that can have long term influence and consequences within the department and college (Gomes & Knowles, 1999; Gonaim, 2016). This is due to the paradoxical nature of the role (Hecht et al, 1999) as chairs practically oscillate between states. These paradoxes are rooted in a misalignment between qualifications and training needed for the job, expectations, authority, and job duties (Ludvik & Hagedorn, 2022). Being required to continuously pivot between the stakeholders they serve (Gigliotti, 2021), never fully belonging to any of them, means chairs experience liminality (Freeman et al., 2020; Jenkins, 2016).

A Department Chair is usually a faculty member of the department who provides administrative service for the day-to-day operations. This service could be academic, administrative, or strategic in connecting the faculty to the university. Traditionally, Chairs are appointed/elected for temporary service (Gmelch, 2015) with fixed terms (Hecht et al., 1999) that usually last 3 years (Cal Poly Academic Personnel, 2020). Chairs may serve one or more terms, based on re-election at the end of their term. (Porter, 1961). As chairs frequently come from the faculty, they may wish to be more democratic in nature (Roediger, 2014) and serve as

spokespersons for the department (Porter, 1961), existing primarily to serve faculty (Jenkins, 2016). However, due to changes in higher education, this position now has many stakeholders, which makes it challenging. Moreover, these changes have resulted in more complex requirements for them. This normative paper will focus on department chairs, the skills they must have, and their multiple stakeholders.

Many department chairs receive no formal preparation for the position prior to appointment, resulting in a majority having no job training (Wescott, 2000). With no direct parallel for the role in industry (Gmelch, 2004; Gmelch, 2015), and instead of being deemed academic middle managers (Hecht et al., 1999; Hinson-Hasty, 2019; Miller et al., 2006), many chairs recognize they must learn many things very quickly. Many of them come to this position without possessing detailed knowledge of HR processes, scheduling management, institutional regulations, and, especially, the details of policies. This makes it hard to understand the role they are stepping into fully, so faculty must be motivated to take it on. Some individuals may take the role due to intrinsic motivation, wanting to serve, develop the program, and take on a new challenge of their own accord. Others may take on the role due to extrinsic motivation, having been convinced or forced to take the job by deans or colleagues because of a lack of another willing candidate (Gmelch, W., 2015).

The role of chair can vary widely across universities and even within departments (Jenkins, 2016), as the position was "established to assist academic units to operate proficiently" (Gonaim, 2016, p. 274). As operational proficiency varies from one academic institution to another, and even within departments within the same institution, it is difficult for a new chair or other stakeholders to define and provide comprehensive roles, responsibilities, and skills for the job. This paper aims to provide a conceptual framework and a comprehensive list of roles, responsibilities, and skills of department chairs supported by a literature review. The purpose of this is to provide greater understanding and clarity about the role of the department chair and what the job entails.

CHARACTERISTICS OF DEPARTMENT CHAIRS

Department chairs juggle the conflicting demands of stakeholders, including administration, alums, accrediting agencies, students, faculty, and the dean (Hecht et al., 1999). Thus, the chair should be able to competently address the multiple issues arising from each stakeholder (Tietjen-Smith et al., 2020). This makes the role ambiguous (Carroll & Wolverton, 2004; Gigliotti, 2021; Jenkins, 2016), as stakeholders' needs and problems will differ and evolve over time. To handle the differing needs, chairs should be effective problem solvers, while avoiding overpromising to any party (Perlmutter, 2017) and enabling others to solve problems (Bowman, 2002) as they manage themselves, the position, and people (Freeman et al., 2020).

Due to serving various stakeholders daily, chairs have different measures of success than they did previously, such as faculty tenure and promotion (Miller et al, 2006). Now, instead of being defined by the specific work they do, "chairs are defined by the capabilities they possess" (Bowman, 2002, p. 161) to handle the work and manage stakeholder priorities. As a result, chairs must possess certain skills and behaviors (Brinkley-Etzkorn & Lane, 2019). A literature survey

revealed multiple expected characteristics and behaviors; Table 1 summarizes them. Given the multiple expected characteristics and behaviors, it is surprising that any one person could have all of them, if at all.

As chairs interact with each stakeholder to meet their needs, solve problems, and improve the department, they act as the link between stakeholders (Wescott, 2000). The chair does not fully belong to any stakeholder group and so exists in and is driven by the middle space they occupy (Freeman et al, 2020). This can cause stress and dissatisfaction in both the chair's professional role and personal life if too many trade-offs and disconnections occur (Gmelch, 2004). However, the chair can still foster collegiality, build long-term connections, and establish an informal routine to lessen disconnection (Jones, 2023) and improve the chair's success in the role.

TABLE 1 – DEPARTMENT CHAIR CHARACTERISTICS AND BEHAVIORS

Characteristics	Behaviors
• Charismatic • Compassionate • Credible • Decisive • Empathetic • Encouraging • Energetic • Even-Tempered • Fair • Honest • Humorous • Innovative • Kind • Open-minded • Organized • Passionate • Patient • Perceptive • Problem Solver • Respectful • Supportive • Sincere	• Accessible • Acting as a role model • Communicating clearly • Considerate of others • Consistent • Courteous • Creating collegial atmosphere • Empowering • Encourages open communication • Encouraging problem-solving • Fostering celebrations • Fostering values • Has integrity • Helpful • Leader • Listening • Motivator • Proactive • Providing feedback • Supportive • Transparent about the direction of the department • Trusting • Uplifting & enabling others

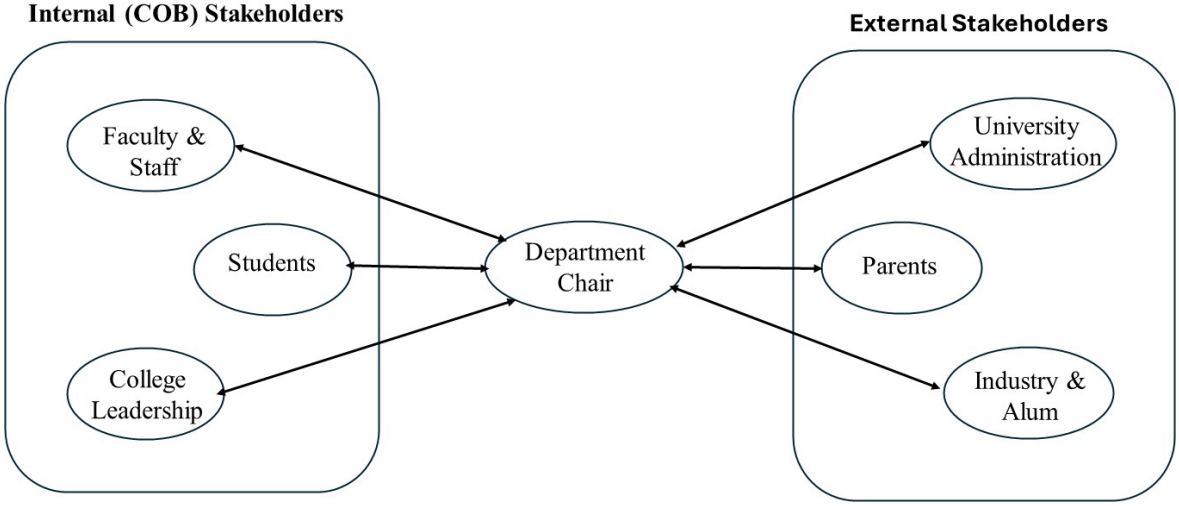
Sources: Trocchia & Andrus, 2003. Bowman, 2002. Gomes & Knowles, 1999. Gonaim, 2016. Walker, 2015. Roediger, 2014. Jasinski et al., 2021. Miller et al., 2006. Perlmutter, 2017. Cornell College, 2018. Parker, 2014.

The role of chair requires an individual to have exceptional emotional intelligence, communication skills, and other personal attributes (Brinkley-Etzkorn & Lane, 2019) as they advocate for and represent all stakeholders and the department to one another (Weaver et al, 2019). The chair engages in reflective practice and "holds the values of fairness, reciprocity, collaboration, interdependence, accountability to a larger community, sustainability, and the inclusion of diverse peoples and experiences at the center of its mission." (Hinson-Hasty, 2019, pg. 127). These values and attributes allow the chair to balance all stakeholders' needs, manage the trade-offs and opportunity costs of the actions and decisions they take, and ensure the organization's success. This research will continue by discussing the stakeholders and their relationships with the department chair.

DEPARTMENT CHAIRS AND STAKEHOLDERS

Unlike regular faculty and immediate college and university leadership, Department chairs interact with external and internal stakeholders almost daily. The department chair has relationships with external stakeholders, namely university administrators (Walker, 2015; Freeman et al., 2020), industry and alum (Hecht et al., 1999), and parents. Internal (College of Business) stakeholders include college leadership (Gmelch, 2004), students, faculty, and staff (Parker, 2014; Hecht et al, 1999). Each of these stakeholders has different expectations of the department chair, some of which may conflict with those of other stakeholders (Buer, T., & Pollart, 2024). This means that chairs must swivel and move between stakeholders to meet different needs and best act in differing situations, as shown in Figure 1. The amount and intensity of interactions may be determined by the school and university in which the chair operates, the resources available, the procedures in place, and the strength of relationships chairs have with stakeholders. Let us examine each stakeholder in detail.

FIGURE 1 – DEPARTMENT CHAIR AND THE STAKEHOLDERS



University Administration

The role of chairs lies between administration and faculty, often mediating between the two (Weaver et al., 2019), as they act as faculty first and administrators second in most universities (Jenkins, 2016). Ultimately, chairs have the challenge of taking on administrative duties while maintaining their academic role (Aggarwal et al, 2009). The extra administrative duties require the chair to have a broad understanding of university and college structures and functions (Gonaim, 2016), to follow the established guidelines given to them (Wescott, 2000), and to know system-wide board policies and to act consistently within the university system (Brinkley-Etzkorn & Lane, 2019).

Having increased knowledge of the university system, mission, and goals will aid the chair as they develop a relationship with the administration (Walker, 2015). Having good relationships will help the chair carry out the dean's and administration's institutional mission (Freeman et al., 2020). The chair channels information from senior administration to faculty as they 'sell' administrative policies and changes related to the institutional mission (Jenkins, 2016; Franklin & Hart, 2006). The 'selling' of these policies by the chair (Jenkins, 2016) requires balancing administrative and faculty needs to "help merge the goals" of both (Walker, 2015, p. 12), which may be difficult to navigate when first appointed, as training and support for chairs is inadequate (Brinkley-Etzkorn & Lane, 2019).

The department chair is also responsible for handling departmental issues that arise with upper administration (Tietjen-Smith et al, 2020) as they have a broader, more informed perspective of the department-university relationship (Hinson-Hasty, 2019). Although chairs do not have the power to solve every problem (Wescott, 2000), they can communicate departmental needs to governing boards and university administration to improve and maintain the department's image and reputation (Hecht et al., 1999).

Industry and Alums

Knowledge of and relationships with alums and the broader industry are important to department chairs, as they may be responsible for securing department funding (Cornell College, 2018). Traditionally, it was not one of the chairs' responsibilities; fundraising may be needed due to broader economic, institutional, or collegiate budget changes and limitations on funding as other institutions seek funds from the same traditional sources (Hickson, 2000). Department chairs may need to find new ways to fund through alums and industry relationships, in the form of monetary grants or reputation affiliations.

The strength of the department's affiliations, industry relationships, and alums support has the potential to increase the department's stature (Kelly, 2013). Increasing the department's image and reputation through relationships with industry alums (Hecht et al., 1999) and the graduates it produces may enhance the department's attractiveness to students, thereby increasing potential college and institutional funding. Funding, time, and talent may also come from

relationships with alums and industry (Hecht et al., 1999), as individuals sponsor new projects for the department, give up their time to talk to students, or one day become guest lecturers.

Building strong relationships with industry and alums can be done through personal communication with those the department already has relationships with, as well as through newsletters and annual reports (Kelly, 2013; Hecht et al., 1999). The chair may also leverage college career fairs and open days as networking opportunities with new employers to garner attention for the department and its graduates. Placing high-performing students within these organizations will also further foster goodwill between the organizations and the department, as they gain a skilled and knowledgeable worker.

Parents

The chair is the face of the department (Cornell College, 2018), so when students are on tours or attending open days with parents, it is the chair who will represent the department to them. Parents are often the purchasers of their child's university courses, with “87% of families pay for a portion of their child’s college tuition” (McCormack, 2019). This means that they are invested in the courses and degrees that their children are pursuing. When chairs participate in showcase/open days, they can have face-to-face conversations with parents and other stakeholders, discuss the department, courses, and majors, and explore the students' and the parents' interests and concerns. This in-person communication allows for immediate clarity on questions, clear communication, and the development of trust (Buer & Pollart, n/d).

Parents may want their child to major in one topic, while the child may want to major in another. The department chair seeks to engage students, supporting student learning and the department's progress (Kelly, 2013). A student may be more likely to be engaged in classwork and in the department when the subject is one they are interested in. In situations where conflict on course occurs between parent and child, the chair may discuss majors, minors, and classes that best suit the student (Gigliotti, 2021; Miller et al., 2006) while addressing any concerns or questions from both the parent and the student.

A parent’s investment may be important to the student’s success, but overbearing or ‘helicopter parents' may hinder the student's success. It is important for the chair to maintain boundaries with students' parents and to follow university and governmental regulations regarding data protection and privacy, such as the Family Educational Rights and Privacy Act (FERPA) (Missouri State University, 2023). This is especially important when parents contact the chair to request information regarding their child's GPA, grades, and course updates. Although the chair should be friendly towards parents and inform them of the courses available within the department, they must adhere to the boundaries and policies in place to protect students’ privacy, as required by law.

College Leadership

Department chairs act and are viewed as middle management for the college in which they are situated (Hinson-Hasty, 2019; DeLander, 2017; Bowman, 2002), serving as the go-

between for faculty and the college Dean when implementing policies, processes, and structural changes, and undertaking paperwork. This means that chairs represent, speak for, and advocate for both the department and the Dean as they liaise between the two (Cornell College, 2018). It is for this reason that college leadership's implementation and relationship with employees is only as good as that of their department chair (Gmelch, 2015).

Creating strong college leadership-department chair relationships can help with the implementation of policies and processes. One way to build relationships is for college leadership to mentor the department chair, benefiting both parties while guiding the chair (Rockquemore, 2016; Gmelch, 2004), allowing the department chair to seek counsel from them (Cornell College, 2018). This will help new department chairs navigate the new role and build relationships both within and outside the college and the wider university (DeLander, 2017). Additionally, helping to develop both the college and the department simultaneously, as it generates a greater understanding of both parties' wants, needs, and goals, through honesty and understanding of each other's preferred professional styles (Gmelch, 2004).

Good leadership-chair relationships lead Deans to view their department chairs as "middle managers" (DeLander, 2017). As such, chairs must not only develop their relationship with the dean but also sustain it in the long term by fostering open communication about good and bad news, being prepared to communicate, and respecting the chain of command (Gmelch, 2004).

Students

Students are customers of a university and all its academic departments (Hickson, 2000), and, as customers, they have wants and needs that sometimes conflict (Bowman, 2002). It is the department chair's responsibility to have a clear understanding of students' needs to lead and promote an innovative curriculum that meets them (Trocchia & Andrus, 2003). This provides chairs with the opportunity to have a significant impact on student success by influencing the degree of student-centeredness within the department (Wade, 2020) through student engagement (Kelly, 2013; Parker, 2014) and the curriculum.

Students have many options and may not be the traditional, typical student, having left high school and moved onto a university campus the following academic year. Instead, mature students or traditional-aged students may be taking classes on campus in the evenings after their 9-5 job, or may not even be on campus at all, opting for web-based distance learning (Franklin & Hart, 2006). The chair plays a role in recruiting students, advising them when no advisement center is available, and connecting them with faculty, helping students decide on majors, minors, and classes that best suit them (Gigliotti, 2021; Miller et al., 2006). The recruitment and advisement done by chairs may not be obvious but subtle, through conversations at college-wide recruitment events or through emails and quick chats with students considering a major within the department.

The chair should also monitor student enrollment in individual classes, majors, and minors, conduct exit interviews with selected graduating seniors, take note of student feedback through course evaluations, and address any larger or recurring complaints they may bring to the

chair's attention (Ludvik & Hagedorn, 2022). Doing so will provide the chair with information on which courses are popular and well-received by students, and which are underattended or may need revision. The chair can influence the marketing of courses (Trocchia & Andrus, 2003). It can use this influence to promote popular and new courses whilst working with faculty to revamp those that need it. Taking note of students' wants, such as more industry talks or placement opportunities that will benefit them, the chair can leverage industry and alums connections to provide them to students.

Faculty & Staff

Chairs have a dual role (Hecht et al., 1999), with the primary role of helping colleagues be successful (DeLander, 2017) and advocating for faculty needs (Weaver et al., 2019; Hecht et al., 1999). To do this, Chairs should get to know faculty, learn about them and their passions, and listen to what they tell you directly and indirectly (Parker, 2014). Doing so will enable the maximization of individual faculty strengths and the minimization of weaknesses, setting individual expectations and renegotiating them as these strengths and weaknesses change (Kelly, 2013).

Motivating faculty and ensuring cohesion within the department are also the roles of the Department Chair, as they influence faculty job satisfaction (Mgaiwa, 2023; Gonaim, 2016). To maintain staff and faculty motivation, the department's vision should be shared (Kelly, 2013) without focusing solely on numbers; rather, it should be humanized (Perlmutter, 2017). Staff and faculty should be consulted and respected when changes occur (Roediger, 2014), and their participation should be acknowledged (Kelly, 2013). Appropriately benchmarking faculty's progress will also motivate and allow room for growth among faculty. Failure to do so will cause counterproductive anxiety, deny growth opportunities, and hinder motivation (DeLander, 2017). Listening to and identifying faculty interests may help the chair manage faculty talent and facilitate their work for the greater good of the department and university (Hinson-Hasty, 2019; Trocchia & Andrus, 2003), thereby aiding overall faculty motivation.

Department chairs serve as leaders, managers, developers, mentors, advocates, and recruiters (Brinkley-Etzkorn & Lane, 2019) as they encourage and empower faculty by providing opportunities to network and attend conferences (Parker, 2014). Both external and internal relationships should be encouraged. Internal relationships between faculty and staff can be fostered by the chair, creating social capital and partaking in community-building efforts (Masket, 2017). The department chair should help people get along with each other (Cornell College, 2018). This starts with the chair connecting with every member of the department, fostering friendships and recognizing their accomplishments (Munger, 2010).

Creating a cohesive, welcoming department for all faculty and staff begins with ensuring the department hires people with the right 'fit' that complements the department's culture and vision (DeLander, 2017). It is then the department's responsibility to guide and mentor new faculty, helping them feel welcome and ensuring their success (Cornell College, 2018). On the occasion conflict does occur, faculty-faculty, faculty-policy, faculty individual issues, Department Chairs should be problem solvers, without overpromising results (Perlmutter, 2017).

If the conflict is faculty-faculty, department heads are responsible for understanding both sides of the story and explaining to the individuals that they will get back to them on the issue, so they have time to investigate both sides (Roediger, 2014). If the problem is a faculty member's personal issue, the chairs' role is to empathetically listen and encourage the faculty member to contact the appropriate office when needed (DeLander, 2017).

Listening to faculty should be done throughout the chair's appointed term, not just when problems/conflict arise. Through this approach, the chair can play a strategic leadership role rather than a traditional go-between. Faculty should feel heard and valued, having a 'safe place' to speak freely at forums, this may be in the form of a departmental meeting, or in the form of an open-door policy so individuals can come to the chair and express what they need at any given time (Jenkins, 2016). Listening and communicating should also take place in person rather than over email to ensure more effective, well-thought-out communication and to help the chair demonstrate authority (Munger, 2010). Being positive will foster optimism among faculty. It is important for the chair to be truthful (DeLander, 2017). Candor will earn the faculty's respect when little can be done (Jenkins, 2016). It is better to displease staff and faculty honestly rather than to blindside or dismiss them (Masket, 2017).

Department Chair

A department chair has the complex and multifaceted role of managing and balancing the numerous roles and competing systems involved in academics and management that often contradict one another (Freeman et al, 2020; Franklin & Hart, 2006; Hubbell & Homer, 1997). Therefore, as they transition from faculty to chair, they shift from faculty teaching specialists to generalists who must now manage a multitude of problems and constituencies (Gmelch, 2015; Hecht et al., 1999). Once they become chairs, instead of focusing solely on their scholarly and academic role, they are also responsible for the department's daily operations (Wescott, 2000).

The role of chair differs from the individual's previous role as a faculty member, so it is unlikely that the faculty plans for administrators' careers. With few opportunities to learn the role, on-the-job training is often necessary (Deal, 2014). The role of chair is both highly political (Hubbell & Homer, 1997) and servant-led (Gmelch, 2004), as they are guided by the faculty they serve and by the relationships, information, and decisions they make. Chairs are expected to utilize their position to adapt to, generate, and lead change, and transform the department, college, and institution (Wescott, 2000; Tietjen-Smith et al, 2020; Franklin & Hart, 2006); however, they have little authority or power to do so alone (Hinson-Hasty, 2019; Hubbell & Homer, 1997; Ludvik & Hagedorn, 2022). Instead, chairs operate with shared governance, with faculty, administration, and university committees.

Chairs should be open to sharing authority with faculty and administration; doing so will help reduce the demands of the position (Gonaim, 2016) and maintain a collegiate mentality while developing shared governance. Shared governance means the chair is not the only person responsible for the task. However, they may have no formal individual power, but they may have collective power to accomplish change. Having inclusive committees that represent everyone

with a stake in the issue, not just faculty, will allow the department to employ shared governance and help generate consensus and support for the work being done (Jenkins, 2016).

Much of the work done by chairs is only partially visible to stakeholders. One of the more visible responsibilities of the chair to their stakeholders is being accessible and accountable to both internal students, faculty, and administration, as well as external groups (Brinkley-Etzkorn & Lane, 2019). Accessibility may be through communication means such as email, in-person appointments, or by being seen walking around the department, engaging with faculty, staff, and students, and setting the tone for the department (Roediger, 2014; Cornell College, 2018). However, this accessibility should be balanced with the need for blocked time to provide undivided attention and thought-out responses to matters (Miller et al, 2006).

Undivided attention to tasks is possible for short periods; however, the chair has a multitude of tasks to carry out. These tasks may include planning, performance reviews, fiscal budgets, representing the department, human resource activities, general management (Weaver et al, 2019; Brinkley-Etzkorn & Lane, 2019), and more, as seen in Table 2, managing the task-centered, relationship-centered, and leadership-centered challenges that arise with each responsibility (Gigliotti, 2021). Time is a valuable, inelastic, and irreplaceable resource for the chair, and with all tasks requiring time (Gmelch, 2004; Miller et al., 2006), the chair must prioritize tasks of importance to avoid overwhelming or poorly managing the time required to complete them. Rushing tasks or not paying them the proper attention could disrupt the flow of work and the relationships associated with them.

To navigate tasks and achieve the best outcomes for the department, the chair should understand the goals and ambitions of each stakeholder, especially the faculty (Walker, 2015). Knowing faculty goals and ambitions is important as they hire and promote new colleagues who are considerate of others and will take part in the participatory collegial culture of academe and the department (Masket, 2017; Hubbell & Homer, 1997), which will allow for the fostering of a positive department culture and job satisfaction. Knowing the goals of faculty will also help the chair advocate for things the faculty need (Masket, 2017) to reach their goals and feel a sense of esteem and intrinsic motivation to continue performing and helping to improve the department and their teachings. Having a vision of success and serving as a role model for improvement and change by supporting and motivating faculty goals are leadership responsibilities of the chair, as seen in Table 2.

Leadership responsibilities are assumed after learning the managerial role and administrative duties (Wescott, 2000), as the chair moves between acts of service to the department and leadership (Freeman et al., 2020). The Department chairs' use of leadership can influence the job satisfaction of faculty and staff (Mgaiwa, 2023). As chairs work for the collective (Gmelch, 2015), they may use different leadership styles for different stakeholder situations. A facilitative or democratic leadership style may be used with faculty to foster a climate of motivation (Gmelch, 2015; Gonaim, 2016), as faculty can have a say in the transformation of the department, and the chair simultaneously implements a transformational leadership style (Mgaiwa, 2023) in order to bring about progress for the department. When dealing with administrative tasks, the chair may use a line-authoritative or rational-analytic approach (Gmelch, 2015; Hubbell & Homer, 1997) to gain acceptance and implementation of the

administration's desired policies within the department. The chair should define academic leadership for themselves and flexibly employ preferred styles to fit the job and achieve faculty and staff satisfaction (Mgaiwa, 2023; Gmelch, 2015).

Leading the department requires vision and judgment (Wescott, 2000). It is important for the department chair to have an outward, future-oriented view, with a comprehensive, diagnostic, and prescriptive vision of the environment impacting the department and of how the department impacts the community (Perlmutter, 2017; Kelly, 2013). Having a vision for the department will help the chair make important contributions and difficult decisions (Munger, 2010), as they understand what is necessary to bring about change and progress. Although bringing change is important for the department, it should be balanced with continuity (Jasinski et al., 2021), as the chair has little time or power to effect long-term transformational change during their term. This factor underscores the importance of succession in the complex nature of the department chair role. When we summarized the literature on roles, responsibilities, and skills (Table 2), we recognized that succession was barely mentioned. Even though curriculum decisions are faculty-driven in many universities, chairs are responsible for implementing these decisions by following policies and procedures, and even initiating new hiring activities based on the direction the faculty wants to proceed with the changes. In such cases, the chair holds the departmental memory and knowledge that needs to be transferred to the new chair.

At the end of the term as chair, if they have acted as a successful leader in the role, they will have been a role model, mentor, and coach for future chairs. Mentorship should continue as an individual's term of chair comes to an end, to mentor future chairs and foster the successor's understanding of the role (Tietjen-Smith et al., 2020). A chair can offer advice based on their own experiences to help the successor be productive and effective in the role when it becomes their term (Deal, 2014). Mentoring the new chair will ultimately help close the training gap, prepare the new chair for the challenging role, and reduce the stigmatization of the role among faculty.

Overall, the role of chair requires an individual to have exceptional emotional intelligence, communication, and interpersonal skills (Brinkley-Etzkorn & Lane, 2019; Miller et al., 2006) as they advocate for and represent all stakeholders and the department to one another (Weaver et al., 2019). The chair engages in reflective practice and “holds the values of fairness, reciprocity, collaboration, interdependence, accountability to a larger community, sustainability, and the inclusion of diverse peoples and experiences at the center of its mission.” (Hinson-Hasty, 2019, p. 127). These values and attributes allow the chair to balance all stakeholders' needs, manage the trade-offs and opportunity costs of the actions and decisions they take, and ensure the organization's success.

Stress and Success of Department Chairs

Multiple researchers noted that department chairs were inadequately prepared for the tasks they must perform (Aggarwal et al., 2009; Wescott, 2018; Rockquemore, 2016; Gmelch, 2015). This large number of tasks, combined with a lack of preparation, means that it is common

for chairs to feel overwhelmed (Masket, 2017) and experience elevated stress levels (Rockquemore, 2016; Gonaim, 2016; Aggarwal et al, 2009).

One of the main areas of stress for chairs is the pressure and discomfort of time constraints (Gonaim, 2016), causing many chairs to feel as though they have insufficient time to complete all their tasks, remain current in the field, and have uninterrupted research time besides having to teach at least one or two courses depending on the university (Gmelch, 2015; Aggarwal et al, 2009; Masket, 2017). This may lead to a lack of research productivity (Aggarwal et al., 2009; Masket, 2007; Carroll & Wolverton, 2004), struggling to prepare research for publication and secure financial support for their research endeavors (Aggarwal et al., 2009). Having time to conduct and publish research is important to department chairs, as they entered the career to become faculty members, not to enter management (DeLander, 2017); therefore, they may be stressed by career progression that is not what they intended (Aggarwal et al., 2009).

TABLE 2 – DEPARTMENT CHAIR ROLES, RESPONSIBILITIES, AND SKILLS

Role	Responsibilities / Tasks	Skills / Abilities
Department Developer (Brinkley-Etzkorn & Lane, 2019)	• Develop and initiate long-range departmental goals (Gmelch, 2015; Aggarwal et al, 2009) • Support curriculum development (Gmelch, 2015; Aggarwal et al, 2009) • Assist curricular and program reviews and develop the programs alongside faculty (Hecht et al, 1999) • Solicit ideas to improve the department (Aggarwal et al, 2009) • Create systems to enhance faculty strengths (Bowman, 2002) • Promote innovative curriculum (Trocchia & Andrus, 2003) • Know student needs (Trocchia & Andrus, 2003)	• Strategic thinking (Gmelch, 2015) • Compelling vision (Gmelch, 2015; Trocchia & Andrus, 2003) • Being a change leader (Gmelch, 2015) • Transitional Communication (Bowman, 2002) • Creating a collegial department (Trocchia & Andrus, 2003) • Implement change successfully (Trocchia & Andrus, 2003) • Reflection (Gmelch, 2014) • Strategic planning (Ludvik & Hagedorn, 2022)
Leader (Brinkley-Etzkorn & Lane, 2019; Gmelch, 2015; Trocchia & Andrus, 2003; Aggarwal et al, 2009. Bowman, 2002)	• Set the tone and be a role model, setting an example for the department (Roediger, H. L. III, 2014) • Promote teamwork (Gmelch, 2015) • Lead change (Gmelch, 2015) • Be accessible (Cornell College, 2018), • Provide vision and judgment (Wescott, 2000; Jenkins, 2016) • Be an informal faculty leader (Aggarwal et al, 2009)	• Genuine leadership (Gmelch, 2015) • Community building (Gmelch, 2015) • Motivating others (Trocchia & Andrus, 2003) • Effective communicator (Trocchia & Andrus, 2003) • Democratic leadership (Trocchia & Andrus, 2003)
Manager (Brinkley-Etzkorn & Lane, 2019; Gmelch, 2015;	• Manage finances and other resources (Gmelch, 2015; Aggarwal et al,	• Deploying and managing resources (Gmelch, 2004)

Trocchia & Andrus, 2003; (Bowman, 2002)	2009; Bowman, 2002) • Assigning duties (Gmelch, 2015; Aggarwal et al, 2009) • Manage conflict (Gmelch, 2015; Aggarwal et al, 2009) • Manage Data (Hecht et al., 1999), • Plan curriculum (Weaver et al, 2019) • Maintain a budget (Aggarwal et al, 2009) • Plan and conduct department meetings (Aggarwal et al, 2009) • Record maintenance (Aggarwal et al, 2009) • Coordinate departmental activities (Aggarwal et al, 2009)	• Managing time (Gmelch, 2015) • Problem solver (Bowman, 2002; Perlmutter, 2017) • Ability to budget (Trocchia & Andrus, 2003) • Sound decision making (Gmelch, 2015) • Saying no when needed (Trocchia & Andrus, 2003) • Ability to delegate (Trocchia & Andrus, 2003; Miller et al, 2006) • Attention to detail (Wescott, 2000) • Handling formal complaints (Jasinski et al, 2021)
Faculty Developer (Gmelch, 2015) (Trocchia & Andrus, 2003)	• Recruit staff (Gmelch, 2015). Brinkley-Etzkorn & Lane, 2019. Aggarwal et al, 2009. (Trocchia & Andrus, 2003) • Select faculty (Gmelch, 2015; Aggarwal et al, 2009; Walker, 2015) • Evaluation of faculty (Gmelch, 2015. Western Kentucky University, 1989. Aggarwal et al, 2009. Jasinski et al, 2021) • Review faculty performance (Weaver et al, 2019), • Implement development programs (Gmelch, 2015), • Promotion, tenure and termination of faculty (Hecht et al, 1999; Western Kentucky University, 1989) • Encourage research and publication (Aggarwal et al, 2009) • Build on colleagues' strengths (Bowman, 2002) • Assign authority to others (Walker, 2015) • Remove barriers to success (Walker, 2015) • Organize and lead workshops	• Performance coaching (Gmelch, 2004) • Developing faculty programs (Gmelch, 2015) • Promoting teamwork (Gmelch, 2015) • Evaluating fairly (Trocchia & Andrus, 2003) • Negotiate personalities (Jasinski et al, 2021)
Scholar (Gmelch, 2015) (Trocchia & Andrus, 2003) **Academic** (Aggarwal et al, 2009)	• Remain current with academic discipline (Gmelch, 2015; Aggarwal et al, 2009) • Teach (Gmelch, 2015; Aggarwal et al, 2009; Trocchia & Andrus, 2003) • Partake in research (Gmelch, 2015; Aggarwal et al, 2009)	• esearch (Trocchia & Andrus, 2003) • eaching • rofessional Service
Advocate (Brinkley-Etzkorn & Lane, 2019; Hecht et al, 1999; Jenkins, 2016)	• Represent department to administration and discipline (Gmelch, 2015; Weaver et al, 2019; Aggarwal et al,	• Negotiation (Gmelch, 2004) • Communicating with

	2009) • Speak on behalf of faculty (Hecht et al, 1999) • Communicate department needs (Hecht et al, 1999) • Improve and maintain the department's image and reputation (Hecht et al, 1999)	stakeholders effectively (Gmelch, 2015; Brinkley-Etzkorn & Lane, 2019). Managing conflict (Gmelch, 2015; Jasinski et al, 2021) • Working harmoniously with administrative superiors (Gmelch, 2015) • Representing multiple parties (Trocchia & Andrus, 2003)
Mentor (Brinkley-Etzkorn & Lane, 2019)	• Mentor future department heads (Tietjen-Smith et al, 2020), • Coach and counsel (Gmelch, 2015) • Advise faculty and students (Aggarwal et al, 2009) • Encourage subordinates (Jasinski et al., 2023a)	• Coaching (Gmelch, 2015; Bowman, 2002) • Counseling (Gmelch, 2015) • Emotional Intelligence (Brinkley-Etzkorn & Lane, 2019)

Managing faculty and staff means making decisions that may affect the lives of faculty, staff, and students (Aggarwal et al., 2009). This is especially stressful for the chair when they must make a policy-based decision they may not fully agree with, or that may negatively affect one of the stakeholders (Masket, 2017). The need to remain in compliance with university and college policies and procedures may lead to moral or attitudinal conflicts and discomfort for the chair (Aggarwal et al., 2009; Carroll & Wolverton, 2004).

The chair may be stressed by the increase in social obligations and work-related activities outside of working hours (Aggarwal et al, 2009). Chairs may feel as though they are not recognized for the additional work they are now doing (Aggarwal et al., 2009; Carroll & Wolverton, 2004) and may believe they are receiving an inadequate salary. Although chairs may experience a small reduction in the number of courses they teach, the pay increase may not be substantial enough to offset the additional work they are now undertaking (Aggarwal et al., 2009; Masket, 2007).

Many tasks and responsibilities make stress common among chairs (Gonaim, 2016; Aggarwal et al., 2009), so it is important to acknowledge that it may take time for a chair to become comfortable in their new role and the tasks and responsibilities it entails (Rockquemore, 2016). A balance between tasks may take time to find, but chairs need to look after their overall well-being and manage stress by taking time to de-stress, to help them be successful in the role (Rockquemore, 2016).

The success of the department chair may be measured in many ways by the college or university (Trocchia & Andrus, 2003). One success measure may be a positive faculty climate, which includes resource support for research and teaching, research productivity, professional development opportunities, and overall faculty satisfaction (Trocchia & Andrus, 2003; Gmelch, 2015). A positive faculty climate may lead to low faculty turnover, increased tenure, stronger faculty development, and, in turn, improved teaching quality and program advancement (Trocchia & Andrus, 2003; Hecht et al., 1999; Gmelch, 2015; DeLander, 2017).

Improvements in department teaching and program quality may enhance student orientation and satisfaction, increasing student engagement, graduation rates, and job placements (Trocchia & Andrus, 2003; Kelly, 2013; Hecht et al., 1999). In turn, this success will have a knock-on effect on the college and university through increased recognition of the program, student enrollment, superior faculty candidates, and alum contributions (Trocchia & Andrus, 2003; DeLander, 2017; Kelly, 2013).

The success of the department chair is influenced by the collegial atmosphere and environment of the department upon arrival, as well as by those they can foster (Trocchia & Andrus, 2003; Cornell College, 2018; Gmelch, 2015). Therefore, the chair's socialization and departmental acceptance also impact on the chair's success in the role (Gmelch, 2004). Acceptance from the department may help the chair become comfortable in their new roles and responsibilities, as well as build relationships with faculty, college leadership, and external stakeholders, to implement practices that aid the department's strategic development and foster a collegial environment.

IMPLICATIONS AND FUTURE RESEARCH

The extant literature states the paradoxical nature of the role (Hecht et al, 1999) as chairs are expected to act as both faculty and administrator (Jenkins, 2016), which has conflicting interests. This paper provided a comprehensive overview of the department chair position, including the characteristics and behaviors chairs are expected to exhibit, the tasks, roles, responsibilities, sources of stress, and factors contributing to success in the role. The implications of the findings and potential future research avenues will be discussed in this section.

Understanding the position and its roles may help upper administration accept the reliance they place on department chairs as change agents and in responding to external pressures (Hecht et al., 1999). This may provide more acknowledgment to department chairs for their work as “academic leadership is an iceberg in which 90 percent of what [they] do is below the surface and would only be noticed if [they] screwed up” (Perlmutter, 2023, p. 41). A greater understanding of the work of a department chair will allow the university and college to implement practices to aid them in their success as they begin to see issues that cannot be fixed bottom up, as the chair has little authority in some cases, meaning the issues need to be fixed top down (Hickson, 2000). Doing so may change the role of the chair, which is in ‘danger of breaking’ (Ludvik & Hagedorn, 2022), and adapt it into a position that is more sustainable and adaptable to department needs.

There is potential for co-chairs to divide the roles, responsibilities, and tasks of chairs, providing support and resources to new and long-term chairs. This division of duties could help a department use its resources more sustainably (Jasinski, 2023b), as co-chairs may continue to teach, research, and take on administrative duties. Both co-chairs would continue to find a balance between self-fulfillment and improving their service to stakeholders (Perlmutter, 2023). This would, in turn, mean the absence of a chair would be less noticeable if they need to take a mini-sabbatical due to role stress (Jasinski, 2023b). If one chair returns to the faculty, there will still be one chair to guide the new co-chair through the role and facilitate an easier transition. The

co-chair option may also address the succession issue we mentioned before. Future research may examine the viability of co-chairs and the further implications of this position dynamic.

Associate or assistant chairs may also be used to relieve the department chair's workload, especially in large departments. An associate chair reports to the chair and advises on resource allocation, faculty development, and progress, as well as other responsibilities assigned by the department chair (Inside Higher Ed, 2024; Kent State University, 2024). An assistant chair holds a position similar to an associate chair, acting as a liaison between the chair and the department's needs, inquiries, and operations (Jobdescription.org, 2023). Co-chairs, associate chairs, and assistant chairs may be too costly for the department and college; therefore, administrative assistants may be used. A department may share an administrative assistant with another related department, have one for themselves, or even have multiple assistants, depending on the department's administrative demands. The associate chair, assistant chair, and administrative assistant may assist with the chair's administrative duties and routine paperwork; however, they do not assist with managing stakeholders, the multiple responsibilities of faculty and research work, or leadership duties, which the chair may be unprepared to handle.

Research discusses the current lack of training and experience individuals have when they begin in the role, causing a barrier to department chair success (Gonaim, 2016; Rockquemore, 2016). Having an overall view of the role will help colleges and universities develop and implement appropriate training for future chairs, both prior to and during their appointment, provide an outline for potential future applicants, and be used in the recruitment stage of this role. Understanding the leadership responsibilities a chair takes on (Wescott, 2000) helps those recruiting a department chair identify leadership qualities in candidates. However, faculty may have limited leadership and management experience, so future research may examine the best way to prepare chairs for leadership and the leadership style best suited to the role.

Investing in workshops and professional seminars before and during their appointment may enhance their abilities and success (Trocchia & Andrus, 2003). Workshops and seminars on the responsibilities of chairs will aid in preparing future chairs, as current department chairs have lacked access to formal training and preparation for the role (Wescott, 2000), making on-the-job training necessary (Deal, 2014). Training may be outsourced to other organizations, such as the Leadership Development Institute (2024), to effectively train future leaders and provide a program tailored to the individual and their skill set. This allows training to take place before the previous chair steps down and the appointed chair steps into the role, enabling greater preparation and a smoother transition of leadership. Future research may examine the implementation of training for future chairs and discuss the success and limitations of this training on the readiness and success of new department chairs.

Chairs are generally appointed for a term of three years (Cal Poly Academic Personnel, 2020). However, the position is increasingly viewed as long-term (Trocchia & Andrus, 2003). This has led to the question of whether chairs should be retained to minimize the impact of revolving inexperienced chairs (Aggarwal et al., 2009) or whether new chairs are necessary to bring new ideas and continue development. Gmelch (2015) touched on the optimal timeframe for an individual to hold the chair position, but did not provide an exact timeframe. Future research

could expand in this area to determine the optimal, most efficient time for individuals to hold the chair position that would bring the greatest benefit to both the individual and the department, and what happens when the individual returns to their faculty position.

Many chairs chose to step down from the position due to burnout, stress, fatigue from long hours, and the heavy demands of the role (Jasinski, 2023b). Returning to full-time faculty work means a new work-life balance will need to be found, as chairs no longer need to devote themselves to mundane tasks and instead focus on more scholarly work (Perlmutter, 2023). A shift in work patterns, behaviors, and activities from chair to faculty may be a difficult transition for some, as newfound freedom may leave them feeling dazed. In contrast, other faculty and staff may still assume they have knowledge or influence over situations (Jasinski, 2023a). Faculty, staff, and administration should work with the former chair to support their transition and provide opportunities to continue administrative work through committees and projects. Future research may delve deeper into the value that former administrative faculty provide and the compensation they receive for this added value.

The current research focuses on US department chairs and the work they undertake. However, they may also be known as department heads/directors or school head/chair/director, depending on the college or school and its location. Additionally, the role of chairs varies from university to university; research may examine differences in the role across Europe, Asia, Africa, and North America. Such research may offer suggestions for altering the role of North American Universities to make them more efficient and sustainable for both individuals and institutions.

This research also provides an overview of the role of chairs, including their relationship with stakeholders. When conducting this study, we noticed that research addressed the chair-student relationship only briefly, while examining broader roles or other chair-stakeholder relationships; there was a significant lack of information regarding the chair-parent relationship. Therefore, further research could examine how department chairs interact with students and their parents, as well as the frequency of these interactions. This would provide a more informed understanding of these relationships and help prepare future chairs for interactions with these stakeholders.

CONCLUSION

In this paper, we used a literature review to organize the role of a department chair in ever-changing higher education. We are aware that expectations differ across higher education, from research institutions to teaching-research balanced universities and teaching-oriented universities. There may be differences between the colleges of the same university. So, we tried to focus on the commonalities rather than individual institutional differences.

A department chair has many responsibilities and tasks to manage the needs of the various stakeholders they interact with. Effective chairs should follow the principles of building a climate of trust, allowing each member of the department to be responsible for their own work, facilitating a collegial environment, and be aware of themselves, their responsibilities and limits, and aware of occurrences in the department, wider university, and higher education industry

(Gonaim, 2016; Gomes & Knowles, 1999). The chair needs to understand what is expected of them to organize responsibilities and tasks, creating a sustainable workload and balance. Each chair should find their own work-life balance to manage stakeholders and self-expectations, and to reduce the stress the role induces. Doing so will aid the chair's success and provide an environment that cultivates stakeholder success and supports future chairs.

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CONSCIOUS COFFEE: A CASE STUDY ON CAFÉ CAMPESINO'S ETHICAL AND SOCIAL SOURCING

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CASE DESCRIPTION

Bill Harris sat with a familiar tension that had quietly grown into a defining question for the future of Café Campesino. For decades, the company had built its identity on fair trade, transparency, and relationships with small-scale farmers. But now, in a marketplace where large corporations were adopting similar language and certifications, what once made Café Campesino distinctive no longer stood out in the same way. The challenge was no longer whether the company was doing the right thing, it was whether customers understood it. As Café Campesino looked toward its next phase of growth, Harris and his team faced a difficult decision: how could they refine their strategy to grow the business, communicate their value more clearly, and remain competitive—without compromising the mission that defined them?

Many small businesses are trying to find ways to differentiate themselves in the marketplace while remaining relevant. This case explores how one such small business utilizes social entrepreneurship and ethical supply chain development in the specialty coffee industry to gain a competitive advantage. At its core, the case highlights how a business can be built around solving global social and economic inequalities while still operating as a for-profit organization. However, as the specialty coffee industry has evolved, so too have the challenges associated with differentiation. Practices such as fair trade and sustainability—once clear points of distinction—have become more widely adopted and, in some cases, diluted in meaning. As a result, Café Campesino now faces an important question about how it should continue to position itself in a changing marketplace.

This case invites students to consider how Café Campesino can refine its strategy moving forward. In particular, students are asked to evaluate how the company should define its target market, communicate its value proposition, and determine whether adjustments to its product offerings or growth approach are necessary to remain competitive while maintaining its mission. This case would be best suited for undergraduate classes teaching marketing; however, it has strong relevance and can be utilized in the following subject areas: supply chain, management, business ethics, social entrepreneurship, and strategic management. This case is ideal for junior and senior level students. It is designed to be taught in class through discussion or online utilizing the prompt and question banks provided upon request. The instructor should allow for at least 2 hours of outside preparation and teach the case in a 60–75 minute class session.

This case is structured to stimulate class engagement and discussion about ethical business strategies for small businesses, while also encouraging students to develop

recommendations around a central managerial decision. It serves as an excellent tool to demonstrate how a values-driven business can establish purpose while maintaining profit, offering lessons in ethical leadership, sustainable business practices, and the role of business in creating positive social outcomes.

CASE SYNOPSIS

Café Campesino was founded in 1998 by Bill Harris after a life-changing trip to rural Guatemala with Habitat for Humanity. Witnessing a farmer choose a coffee bush over a new house sparked Bill's realization of the economic struggles small-scale coffee farmers faced. This insight led him to start a coffee company committed to fair trade, environmental sustainability, and social responsibility. He returned to Central America, built relationships with farmer cooperatives, and launched a business importing ethically sourced beans. Thus, Café Campesino became a founding member of Cooperative Coffees, a collaboration of roasters importing beans directly from farmer co-ops, ensuring better prices and transparency. The company prioritized organic and shade-grown certification to promote environmental sustainability and chose to remain in Americus, GA to help support a struggling local economy with deep philanthropic roots.

Over time, Bill, his brother Lee, and partner Tripp Pomeroy grew Café Campesino into a respected brand that sells to wholesale and retail customers nationwide. They emphasize ethical sourcing, traceability, and freshness while offering dozens of unique roasts, blends, and teas. Though initially aligned with TransFair USA, Café Campesino left when the organization shifted toward supporting large corporations, thus putting its values of supporting small farmers in jeopardy. Instead, they aligned with other certifiers whose values more closely matched their own, reinforcing the company's commitment to social and environmental standards.

Today, Café Campesino continues its mission-driven work, cultivating loyal customers who value quality, sustainability, and ethical practices. However, the company faces a new set of challenges. The increasing prevalence of "fair trade" messaging among larger competitors has made it more difficult to clearly differentiate. Additionally, the breadth of product offerings and difficulty in identifying and reaching target customers has created potential barriers to growth.

As Café Campesino looks to the future, it must consider how to refine its approach. Questions arise as to whether the company should narrow its product assortment, how it should communicate its value in a crowded marketplace, and which customers and channels will best support its continued growth. The answers to these questions will shape how Café Campesino continues to balance its commitment to ethical sourcing and community impact with the need to expand its customer base and remain financially sustainable. As the case unfolds, students are encouraged to think critically about the decisions facing Café Campesino. While the company has built a strong foundation rooted in ethical practices and community engagement, its future success will depend on how effectively it can translate those values into a clear and compelling strategy for growth.

CASE BODY

SITUATIONAL IMPACT

Café Campesino founder Bill Harris has an interesting background, including a story about choosing between a house and a coffee bush in rural Guatemala. At the time, he had been president of a family grocery wholesaler that had chosen to redesign the company to be a competitive restaurant food provider due to changes in the industry. Although successful in this business, Bill decided that he wanted to do something different and resigned from the day-to-day operations of the company. In March of 1997, while on hiatus from a full-time job, he decided to travel with a Habitat for Humanity group to build homes for people in a rural and mountainous area of Guatemala.

While clearing a property, the group unloaded a mound of dirt on a coffee plant in the area. When the farmer saw what happened, he became irate and told the crew to stop building the new dwelling because the coffee bush was more important to him. After a long discussion with the farmer, and the promise to damage no more plants, work resumed.

However, Bill could not stop thinking about this baffling occurrence. The farmer was willing to give up a new house to protect one single coffee bush. This prompted him to investigate further, and he discovered that most of the farmers had ten acres or less on which to farm, and since each bush produced about two thousand berries, it meant the farmer received about fifty cents a pound of coffee produced from each bush. Surprisingly, this quest revealed that there were millions of small-scale coffee farmers, all of whom were at the mercy of traveling buyers of coffee who dictated a price that was much lower than what was supported by the market.

So, with a servant heart, Bill started brainstorming potential solutions to help these farmers. He finally came up with an idea and went back to Central America in August of 1997 in a jeep and began driving around visiting small-scale farms to gather information, discuss partnerships, and ultimately begin a business that was not only more sustainable and better for the environment, but also more ethically sound and advantageous for these farmers. He stayed in Central America until Christmas and came back and bought a coffee container and officially started his business.

The company became formally known as Café Campesino which, befittingly, was the Spanish translation of "small-scale farmer coffee." In 1998, Café Campesino imported 40,000 pounds (about twice the weight of a school bus) of green coffee beans using the tenets of fair trade by purchasing from agricultural cooperatives (coops) of democratically organized and collectively owned organizations made up of individual small-scale coffee farmers. These farmers banded together in a shared mission to get a premium in price for their crops. This type of operation worked because it helped remove the intense competition among the farmers. Traditionally, individual farmers were (and are) pitted against each other by local buyers who attempt to buy at the lowest price possible by threatening to move on to the next farm if the farmer will not accept the price offered. These co-ops allow farmers to market their coffee

collectively and have more bargaining power in terms of the price that they could charge the buyers for their crops.

Even with these accomplishments, Bill was still curious about how he could continue to help while also growing his business, so he resumed investigating and inquiring about solutions to this problem. By 1999, it emerged that there were several other roasteries in the U.S. who were pondering a similar solution to the problems of these small, impoverished farmers. After lengthy discussions with several people in the industry, six other roasteries decided to invest in his company and in this cause. This led to this group of like-minded members combining forces to create a company called Cooperative Coffees which brought in their first coffee container in 2000 and eventually started utilizing the term "fair trade."

In time, these actions allowed Cooperative Coffees to begin regularly importing green coffee beans directly from the farmer coops and annually increasing their imports of coffee to the U.S. By roasting and selling more "fair trade" coffee, roasters in the group slowly increased consumer demand for fairly traded beans and they grew as their customer base became larger. This is where Café Campesino, again, pivoted and became the company it is today.

While these early experiences shaped the mission and foundation of Café Campesino, they also highlight the complexity of translating deeply held values into a scalable business model, an issue that becomes increasingly important as the company seeks to grow.

ENVIRONMENTAL IMPACT

Due to the new influx, Bill found himself needing more coffee roasted and sold to meet the supply being imported. Thus, he recruited his brother Lee, a successful restaurateur, to move from Tallahassee, Florida, back to Americus, Georgia to help with the operations. Using his culinary skills, along with training from other roasters, Lee was successful in developing techniques in roasting coffee. With help underway, it allowed Bill to continue working with Cooperative Coffees to import green beans from coops. However, he quickly realized he also needed some help running the day-to-day operations and planning a strategy for growth in the future. He became friends with a Habitat volunteer, Tripp Pomeroy, who like Bill had decided to break from his career in restaurants and mutual funds, and hence the third partner in the new Café Campesino was recruited.

Bill and Tripp traveled the Southeast extolling the virtue of fair-trade coffee along with the environmental benefits of organically grown coffee. This included talking to civic groups, coffee shop owners, and retailers about the advantages of buying their coffee and delivering the message that their coffee was "crop to cup." As a result, they were substantiating the value of bringing their coffee to customers. Back home in Americus, Lee was hard at work developing different roasts with his unusual combination of trained chef and roaster by developing many different roasts that were well received by the people drinking their coffee. Concurrently, they had loyal customers including coffee shops, retailers, and individual customers buying from their website.

Bill and Lee grew up in Americus, and Tripp was a transplant who loved the community. The area had previously thrived, but like much of Southwest Georgia, the traditional

manufacturing companies were closing, and the economy sputtered. At the time, the 2nd Congressional District, which includes Americus, ranked in the bottom ten of all 441 Congressional Districts in 2021 with a per capita income of just under $21,000. Just like supporting farmers in rural areas in other countries, the trio wanted to stay in the area to support the town that they loved.

Tiny Sumter County, population of about 28,000, did have a history of success with these types of philanthropic activities. For example, President Jimmy Carter was born and raised in Plains – a small town in Sumter County – and he and his wife Rosalynn continued their community service long after his presidency. This includes the donation of the Rosalynn Carter Institute for Caregiving located on the campus of Georgia Southwestern State University.

Additionally, in 1942, Clarence Jordan established Koinonia Farms in a rural area of the county as a communal farm where people of all genders and race were welcome. Furthermore, Jordan and Koinonia resident Millard Fuller started a group to provide African Americans in the area home ownership, resulting in Fuller later moving to nearby Americus to start Habitat for Humanity. Although Café Campesino would have most likely been more successful moving to Atlanta, the organization maintained the long tradition of commitment to service by staying in Americus. All stakeholders strive to have a social mission of service to the Sumter County community and support small farmers internationally.

For more information on Americus, GA and Sumter County refer to the links below.
https://www.americusga.gov/ https://www.sumtercountyga.us/

These commitments to community and sustainability have become central to Café Campesino's identity. However, they also raise an important question: how can such place-based and mission-driven values be effectively communicated to a broader audience beyond those already familiar with the company?

THE ORGANIZATIONS INVOLVED

The Cooperatives

Café Campesino, through Cooperative Coffees, partners with 13 small farmer cooperatives across Latin America, Africa, and Asia. Leadership has built direct relationships with farmers and coop administrators, reinforcing a hands-on, relationship-driven sourcing model.

https://coopcoffees.coop/

Fair Trade Coffee

Originally aligned with TransFair USA (now Fair Trade USA), Café Campesino supported third-party certification promoting fair wages and sustainability. However, when Fair Trade USA expanded certification to large multinational roasters—allowing them to pay lower prices while still using the label—the meaning of "fair trade" became diluted.

In response, Café Campesino and many independent roasters moved away from this certification, favoring stricter standards or transparency practices (e.g., publicly sharing farmer contracts and pricing). While leaving Fair Trade USA, Café Campesino remains part of the Fair Trade Federation, which evaluates company-wide practices rather than single products. https://www.fairtrade.net/us-en/products/all-products/coffee.html

B Corporation

Café Campesino is a Certified B Corporation, meeting rigorous standards for social and environmental performance, accountability, and transparency. This certification, awarded by B Lab, requires ongoing audits and aligns with the company's mission-driven approach.

Key motivations include:

- Using business as a force for good
- Ensuring transparency and accountability
- Demonstrating fairness through third-party audits
- Meeting customer expectations
- Inspiring industry change

This designation reinforces stakeholder trust by holding the company accountable to employees, suppliers, customers, and the broader community.

https://www.bcorporation.net/en-us/

Although these affiliations and certifications reinforce Café Campesino's ethical commitments, they also contribute to a broader challenge, many competitors now use similar signals, making it more difficult for consumers to distinguish between deeply embedded practices and surface-level claims.

SUSTAINABILITY EFFORTS

Organic Designation

Café Campesino's USDA organic certification reflects environmental—not taste—priorities. While roasting minimizes taste differences, organic farming protects ecosystems, particularly water quality in coffee-growing regions. The company emphasizes sustainability and biodiversity, often supporting "bird-friendly" farming practices.

https://www.usda.gov/about-usda/news/blog/organic-101-what-usda-organic-label-means

Shade Grown Coffee Certification

Shade-grown coffee preserves forest canopies, reduces soil erosion, and maintains natural ecosystems. Unlike sun-grown, plantation-style coffee (which often leads to deforestation,

chemical use, and soil depletion), shade-grown methods allow for long-term land use and environmental sustainability.
https://www.coffeehabitat.com/2006/02/shade_grown_cof/

While these sustainability efforts are foundational to the company's mission, they are not always easily understood or valued by all consumers, further complicating how Café Campesino communicates its differentiation in the marketplace.

THE MODERN CAFÉ CAMPESINO: WHO AND WHAT THEY ARE

Café Campesino is a roastery that believes that coffee should help build community. Not only is profitability important to the company, but their commitment to doing good in the world is apparent. Their core values are maintained from crop to cup, and they continuously strive to improve the world.

Strengths

Café Campesino has exemplary brand loyalty among their customers and does not suffer from customer dissatisfaction with their product. These customers value their company philosophy and also appreciate the quality and taste of their roasts and the freshness of the beans. Bill feels that there is trust between current customers and the company because they know that their purchases contribute positively to the environment and stakeholders.

They have also created an environment where their employees are incredibly supportive of the company. One of the ways this is achieved is because of their transparency efforts and that they open their books to all employees showing the profit/loss in all issues, and the employees both promote the product and work to minimize unnecessary expenses.

These strengths provide a strong foundation for future growth, but they also raise the question of how the company can extend this trust and loyalty to new customers who are not yet familiar with its story.

Weaknesses

Café Campesino has trouble selecting and communicating with their target market(s). The company feels that if buyers of coffee who also value the philosophy of the company know about their products, they have a good chance of selling to them. Additionally, there has been discussion that there are simply too many coffee offerings available and that it could cause some hesitancy in decision making and ultimate conversion due to the overextended product lines.

With some attempts, they have had miscues on how to get their product in front of their potential customers. A good example is that they secured shelf space with a national chain regionally with great fanfare. It was not a success because without, knowing the Café Campesino story, and a considerable number of competing products on the same shelves, their product was

not purchased. As described above, trust between the customer and the company cannot be established in this environment.

These challenges point directly to a broader strategic issue: without a clearly defined target market, streamlined offerings, and a compelling way to communicate its value, Café Campesino risks limiting its ability to grow despite having a strong mission and high-quality product.

CAFÉ CAMPESINO'S CUSTOMERS

Café Campesino sells to both individual retail and wholesale to clients like coffee shops, coops, markets/retailers, restaurants, universities, and hospitals. They also sell to organizations for fundraisers to use as resale. Additionally, they have a thriving internet business with individual consumers and customer reach is consistently growing nationwide through their online presence.

Whether wholesale or retail, the customers must value the company's standards of fair trade, sustainability, and commitment to all stakeholders – and understand that there is a cost to that type of product. Because, just like fine wine, the typical customer of Café Campesino also appreciates the unique roasting, taste, and freshness of the coffee; often roasted within 48 hours of orders being filled.

Customer Segments

1. **Retail Customers:** Consumers that purchase coffee online and in-person straight from Café Campesino for personal consumption.
2. **Wholesale Customers:** Businesses that purchase coffee in large quantities to sell to their own customers.
3. **Online Customers:** Businesses or Consumers from all over the world that purchase coffee online through the Café Campesino website.
4. **Local Customers:** Businesses and consumers that purchase coffee locally in Americus, GA directly from the roastery.
5. **Fair Trade Supporters:** Customers who support fair trade and organic coffee practices and purchase from Café Campesino because of their aligned values.
6. **Café Campesino Travel Program Participants:** Customers that participate in their travel program in order to learn about coffee production and fair trade practices.
7. **Fundraising Partners:** Organizations that desire to sell Café Campesino coffee for resale as a fundraising event.
8. **Café Campesino Coffee Subscribers:** Customers who participate in Café Campesino's automatic shipping program as a subscription agree to coffee delivery at specific intervals in order to receive a discount.

This wide range of customer segments provides opportunities for growth but also creates complexity, prompting the need to determine which segments should be prioritized moving forward.

CAFÉ CAMPESINO'S PRODUCTS

As mentioned previously, Café Campesino only purchases their coffee beans from small-scale community farmers that "we have known for years." Currently, they have forty-three different choices of a variety of roasts including differences in acidity, body, regions, roast levels, blends, and single sources. When ordering, the customer can actually check to see the exact region and batch where the beans are sourced, similar to purchasing a fine wine. Their product offering includes a variety of fair trade, organic, and shade-grown coffee beans with unique packaging that not only highlights the country of origin but also uses unique marketing, including the use of organizations, historical meanings, and landmarks.

Coffee Types

1. **Single Origin Coffees:** Coffee beans sourced from specific regions and cooperative across the world in order to offer a distinctive experience.
2. **Blends:** Coffee beans sourced from two or more origins that are carefully crafted and pre-mixed by the roasters to offer a unique and flavorful experience from all around the world.
3. **Decafs:** Coffee beans that are decaffeinated using the natural water process for filtration for customers who prefer to eliminate caffeine intake while still being able to enjoy a flavorful coffee experience.
4. **Half Caffs:** Coffee beans blended 50/50 between a regular coffee and a decaf coffee of the same roast style for customers who prefer to reduce caffeine intake while still being able to enjoy a flavorful coffee experience.
5. **Expresso Blends:** Coffee beans sourced from various coffee origins with varying roast levels for customers who want rich shots of espresso and a balanced and complex flavor experience.

Roast Types

1. **Medium Roast:** Light brown beans with a light body, bright and nutty flavors with no surface oil.
2. **Full City Roast:** Beans that retain some of the nutty flavor and brightness as lighter roasts while exhibiting the sweetness and richness of darker roasts with patches of natural surface oils.
3. **Viennese Roast:** Deep reddish-brown beans on the with lighter side while retaining its richness without the carbon-smoky flavor with slight natural surface oil.
4. **French Roast:** Dark colored beans having an extra bold and deep flavor with a rich and syrupy taste and layered with natural coffee surface oils.
5. **No Roast:** Green coffee beans for home coffee roasting.

Although it is not their main company focus, Café Campesino also offers teas for purchase online from a partnership with Rishi Tea & Botanicals which is a company that also

imports specialty teas and botanicals sourced from growers all over the world. Like Café Campesino, Rishi Tea & Botanicals is also known for their sustainability practices and socially responsible efforts.

Tea Types

1. **Black Tea:** Black teas produced to have a stronger flavor through oxidization.
2. **Green Tea:** Green teas that are limitedly processed to offer a broad range of flavors.
3. **Herbal Tea:** Herbal teas containing no caffeine made from the infused leaves of any plant other than true tea.
4. **Decaf Tea:** Teas containing no caffeine for those wishing to eliminate it from their diet.

For more information on Café Campesino and Rishi Tea refer to the link below.
www.cafecampesino.com
https://rishi-tea.com/

While this variety showcases the company's expertise and flexibility, it may also contribute to customer confusion and decision fatigue, raising the question of whether a more focused product strategy could improve clarity and conversion.

As Café Campesino looks ahead, its leadership must make a series of interconnected decisions that will shape the company's future. With a strong ethical foundation but increasing competition and complexity, the company must determine how to clearly define its target market, communicate its unique value, and structure its offerings in a way that supports both growth and mission alignment.

The path forward is not straightforward. Each potential decision carries trade-offs between clarity and variety, scale and authenticity, and growth and mission integrity. How Café Campesino chooses to navigate these challenges will ultimately determine its ability to sustain both its impact and its business.

PROMPT

Bill has worked hard for many years to build his company into what it is today. However, as the market has evolved, he continues to look for ways to grow the business while staying true to its mission of supporting small farmers and promoting sustainability. The ability to expand this impact depends on Café Campesino's ability to grow its customer base. While the company has found success through creative strategies—such as sponsoring Bike Ride Across Georgia and building relationships through shared experiences—it must now consider how to build on these efforts in a more focused and scalable way.

You have been asked to help identify opportunities for growth and provide recommendations for how Café Campesino should move forward.

In doing so, you should:

- Identify and justify a target market

- Consider whether the company's current product offerings support or hinder customer decision-making
- Develop a clear positioning approach that communicates the company's value beyond traditional fair-trade messaging
- Propose a marketing plan, including a budget and metrics to evaluate success

Your recommendations should reflect an understanding of both the company's mission and the realities of competing in a dynamic marketplace. The final report should be written in a professional format and be no shorter than 2,500 words.