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## TABLE OF CONTENTS

EDITORIAL REVIEW BOARD.....	III
LETTER FROM THE EDITORS.....	VII
A DEMOGRAPHIC ANALYSIS OF GRADUATE PROGRAMS IN HIGHER EDUCATION ADMINISTRATION IN THE UNITED STATES .....	1
Devon Jensen, Georgia Southern University	
LEADERSHIP EDUCATION AND GENDER ROLES: THINK MANAGER, THINK “?” .....	21
LeAnne Coder, Western Kentucky University M. Shane Spiller, Western Kentucky University	
LEARNING THROUGH NARRATIVES: THE IMPACT OF DIGITAL STORYTELLING ON INTERGENERATIONAL RELATIONSHIPS .....	53
Kim Flottemesch, Concordia University-St. Paul	
CAREER CONCERNS OF CHINESE BUSINESS STUDENTS IN THE UNITED STATES: A QUALITATIVE STUDY .....	61
Xin Liu, University of San Diego	
WEB 2.0 IMPLEMENTATION: AN ANALYSIS OF AACSB ACCREDITED SCHOOLS OF BUSINESS FROM AN INTERNATIONAL PERSPECTIVE.....	73
Carl J. Case, St. Bonaventure University Darwin L. King, St. Bonaventure University	
ADAPTING THE MARKETING EDUCATIONAL ENVIRONMENT FOR MULTI-CULTURAL MILLENNIALS: THE CHINESE EXPERIENCE .....	83
Nancy K. Keith, Missouri State University Christina S. Simmers, Missouri State University	

CHEATING IN HIGHER EDUCATION: THE CASE OF MULTI-METHODS CHEATERS .....	93
Laurent Josien, Utah Valley University	
Britton Broderick, Utah Valley University	
DOCTORAL TRAINING IN TEACHING AND PREPAREDNESS OF EARLY-CAREER MARKETING EDUCATORS .....	107
Timothy C. Johnston, Murray State University	
Martin I. Milkman, Murray State University	
James P. McCoy, Murray State University	
DEVELOPING A WRITTEN RESEARCH PRODUCTIVITY POLICY FOR A DEPARTMENT OF ACCOUNTING: A CASE STUDY .....	117
Kenton B. Walker, University of Wyoming	
Gary M. Fleishman, University of Wyoming	
Teresa Stephenson, University of Wyoming	

## LETTER FROM THE EDITORS

Welcome to the *Academy of Educational Leadership Journal*, the official journal of the Academy of Educational Leadership. The AEL is an affiliate of the Allied Academies, Inc., a non profit association of scholars whose purpose is to encourage and support the advancement and exchange of knowledge, understanding and teaching throughout the world. The mission of the *AELJ* is to publish theoretical, empirical, practical or pedagogic manuscripts in education. Its objective is to expand the boundaries of the literature by supporting the exchange of ideas and insights which further the understanding of education.

The articles contained in this volume have been double blind refereed. The acceptance rate for manuscripts in this issue, 25%, conforms to our editorial policies.

We intend to foster a supportive, mentoring effort on the part of the referees which will result in encouraging and supporting writers. We welcome different viewpoints because in differences we find learning; in differences we develop understanding; in differences we gain knowledge and in differences we develop the discipline into a more comprehensive, less esoteric, and dynamic metier.

Information about the *Journal* and the Allied Academies is published on our web site. In addition, we keep the web site updated with the latest activities of the organization. Please visit our site and know that we welcome hearing from you at any time.

Michael Shurden  
and  
Susan Shurden  
Co-Editors



# **A DEMOGRAPHIC ANALYSIS OF GRADUATE PROGRAMS IN HIGHER EDUCATION ADMINISTRATION IN THE UNITED STATES**

**Devon Jensen, Georgia Southern University**

## **ABSTRACT:**

*This paper explores the history of Higher Education as a field of study as described in the literature and uses this as a foundation to explore the current context of graduate programs in higher education administration through a descriptive analysis of existing programs in the United States. Data analyzed in this study consider graduate programs in higher education administration under the constructs of program demographics, application requirements, and program structure.*

## **INTRODUCTION**

Over the past several years, there has been a growing interest in the field of Higher Education Administration. At the time of the writing of this document, a quick review of the Barnes and Noble website in the US listed 1401 books under the heading of Higher Education Leadership. The reality of this extensive amount of literature indicates that North American society wants to know more about Higher Education from how to pick the right college to how to be a women administrator in a university. The scope of the literature also represents the complexity of Higher Education. It further indicates that more and more academics and writers are researching and studying Higher Education as a separate and defined topic. Along with more researchers, there is a growing demand among learners to be educated in the field of Higher Education Administration. Conscious of this growth, the focus of this research was to conduct a demographic study of all graduate programs in Higher Education Administration across the United States. The intent was to survey the landscape of the programs to reveal a broader look at just what is currently happening with this field of study.

## **RETRACING THE FOOTSTEPS**

Many of these current efforts into studying Higher Education trace back to the original ideas of Granville Stanley Hall who taught the first North American university course in college and university problems in 1893 at Clark University (Goodchild, 1996). Further evidence of a growing interest in Higher Education as a field of study came in 1930 with the first publication

of the Journal of Higher Education that has grown to become one of the pre-eminent journals on the issues of Higher Education. In this same year, Miller (1930) published an article that surveyed Masters and Doctoral Theses written on issues related to Higher Education between the years 1919 and 1928. In his research, he was able to locate 250 theses written about Higher Education. A total of 65 were at the doctoral level with 185 at the masters level. A breakdown of the doctoral studies revealed 31% of the theses focused on administration, 17% concentrated on issues pertaining to tests and measurements, 11% considered college teaching and teachers, an equal of 11% dealt with university curricula, another 9% focused on the history and description of Higher Education, with the final 6% on guidance.

Within the Journal of Higher Education, an article appeared in 1937 by Payne (1937) further justifying the need for continued research in matters related to Higher Education. Payne spoke of his concern that higher education of his time used trial and error practices related to leadership and curriculum in higher education. He expressed the desire to use research as a means to better understand just what was going on with higher education in North America. Another reference to Higher Education occurred in 1938 with the publication of "A University Course on The American College" (Eells, 1938). Eells, along with the American Association of University Professors, recommended that universities across the country offer a course on issues and problems related to the American college. It was deemed that any student wishing to pursue a career in college teaching take a class of this nature. Eells also felt that this class should be housed in the Faculty of Education.

The general aim of the course was to develop such understanding and attitudes concerning the history, objectives, organization, and administration of American higher education as to make the students taking it more effective university or college professors, more intelligent participants in the determination of college and university policies, and better interpreters of the institutions of which they might become a part to the communities in which they might be located. (Eells, 1938, p. 141)

In the same year of 1938, Palmer (1938) wrote an article that described Higher Education courses that were being offered throughout the summer of 1938 at various institutions. The intent was to have leaders and academics become actively involved in these classes. Some of the classes listed were: Organization and Administration of Colleges and Universities, Administrators in Higher Educational Institutions, Social Functions of Universities in Europe and North America, Curriculum and Method of Higher Education, Trends in Higher Education, and Functions and Problems of the College Registrar. Some of the universities involved in offering these courses were: Columbia University, The University of Chicago, Ohio State University, The University of Minnesota, and the University of Kentucky.

In 1948, Dykstra (1948) wrote an article that responded to the Report of the Presidents Commission on Higher Education published that year. He expressed concern over the balance among local, state, and national level issues related to the organization of the Higher Education system. He concluded with four statements of concern. First, he was concerned that the

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Presidents Commission recommendation of strengthening state departments of education under a single board put too much power over education into the hands of a few. Second, a response to this was for each state to establish its own state commission on higher education. Third, from a national perspective, Dykstra saw validity in strengthening and expanding the role of the United States Office of Education. Fourth, he supported the need to create new mechanisms for increased coordination between state and federal systems of higher education.

Another historical moment - based on the current body of literature available in journals and periodicals - occurred in 1969 when James Rogers (1969) introduced readers to research on this topic with *Higher Education as a Field of Study*. The purpose of the study was to document the incidence of offerings in Higher Education at the doctoral level. The study included 137 institutions with a total of 86 reporting the existence of some kind of Higher Education programs on their campuses. A similar study occurred in 1970 with Palinchak's (1970) studied titled, *Survey of Requirements for a Doctoral Program in the Field of Higher Education*. The design of this study had faculty teaching classes in Higher Education respond to a survey instrument. The questionnaire surveyed faculty responses to matters such as the areas of study to be included in Higher Education and whether or not the program should have a scholarly or training approach.

Another important piece appeared in a work edited by Harclerod (1974). The compilation of writings grew out of a national conference of the Association of Professors of Higher Education. At the time, the writings clearly espoused the point that Higher Education was growing as a legitimate field of academic study. Some of the entries in the work included: *Doctoral-level Graduates with Higher Education as a Specialized Field of Study* by William Carr and *What Role for Professors of Higher Education?* by Samuel Kellems. A similar compilation of writings coming out the 1976 conference of the Association of Professors of Higher Education had equally important results – Higher Education was a growing field of academic study (Harclerod, 1976).

Also in the 1970s, Hobbs and Francis (1973) conducted research looking at the scholarly activities of professors who aligned themselves with the field of Higher Education. The effort in looking at this data was to begin to rationalize if there is a theory of higher education and can it be classified as a distinct field of study. Hobbs and Francis stated,

higher education is simply not a discipline. It is a multidisciplinary field instead, encompassing various phenomena which are conceptualized along several disciplines to which the discipline speaks. Indeed, one can hardly imagine higher education divorced from sociology, economics, history, philosophy, psychology, or political science. (p. 56)

In order to develop a true theory of higher education, they suggested a need for higher education theorists and appropriate publication channels with which to solicit their theories (p. 59).

In line with this request, one of the premier associations in the US for looking at issues related to Higher Education is the Association for the Study of Higher Education (ASHE). It has as its goals:

The Association for the Study of Higher Education (ASHE) promotes collaboration among its members and others engaged in the study of higher education through research, conferences, and publications, including its highly regarded journal, *The Review of Higher Education*. ASHE is committed to diversity in its programs and membership, and has enjoyed extraordinary success in involving graduate students in Association activities. (ASHE website, 2011)

On the Canadian side, the premier association is the Canadian Society for the Study of Higher Education (CSSHE) with its journal, *Canadian Journal of Higher Education*. This association's purpose is toward

the advancement of knowledge of postsecondary education through the dissemination through publication and learned meetings. The mission of the CSSHE is to facilitate and promote, by means of comprehensive partnerships and programs, the creation, dissemination and application of research of exemplary quality in postsecondary education in Canada. (CSSHE website, 2011)

These two associations with their linked journals are actively pursuing Higher Education as a field of study and providing the necessary venues for this to occur.

Research into Higher Education continued into the 1980s with Cooper's (1980) work titled, *Special Problems of the Professor of Higher Education*. Of central concern in this paper were how the professors viewed Higher Education as a field of study and how the campus environment supported this. Johnson (1982) further contributed to this body of literature by profiling faculty who teach in Higher Education. He surveyed 65 institutions with a total of 200 faculty responding to the survey instrument. Of the core findings, the participants viewed teaching along with their research and publications as central to the quality of the programs offered in Higher Education. This study was important in that it was one of the first studies to look at the characteristics of those who consider Higher Education as their chosen field of study.

According to data available at the time, by 1989 the US had 4476 students of higher education, 1306 at masters level and 3170 at the doctoral level (Adams, 1991). A 1987 survey of the directors of the 88 higher education doctoral programmes indicated that the major purpose of over 90% of these programmes was the educational training of higher education administrators (Townsend & Wiese, 1991). However, that same year McDade (cited in Schofield, 1996) reported that the professional development opportunities for middle level administrators in the US was disorganised, and not well developed. This work is evident of how important it is to look closely at programs of higher education administration and how they are structured and conceptualized.

Miller and Nelson (1993) turned attention to a review of actual course syllabi from HEA courses. Although there was really no analysis done by the authors related to course content and justification for their inclusion, it did allow educators to look closely at how their counterparts were designing curriculum. Some of the courses surveyed in the study included: History of

American Higher Education, Comparative Higher Education, Principles of College Teaching, The American Professoriate, and Legal Aspects of Higher Education. Continuing to look specifically at graduate programs in Higher Education, Miller and Vacik (1996) conducted a study to determine the characteristics of excellent HEA graduate programs. Based on a five-point rating scale, the University of Georgia's program in Higher Education Administration was rated as the most excellent among the 22 institutions who participated. Some of the characteristics that brought it to the fore were low student to faculty ratios, graduate student mentoring, quality advising, publishing development, and more full-time faculty. Although this study had a small sample population, it is important to the field of higher education in that it was the second look at how HEA graduate programs were functioning. The first was by Kiem (1983).

In 1998, Glenys Patterson took a close look at those who might be interested in completing a degree in Higher Education Administration. The focus of her commentary was on the ideal attributes and abilities of a university manager. In the piece, she addressed several important issues that all curriculum developers of HEA programs should address. These issues included: Should it be formal or non-certified programs? Should the training of university managers be mandatory, expected, or voluntary? Should it be undergraduate or post-graduate work? Should it have a university or broad tertiary focus? Should academics or administrators teach the courses? Should the outcomes be academic or purely practical? This commentary was challenging academics to ask serious questions about how HEA programs were conceptualized and their intended outcomes.

During the late 1990s and into the new century, much of the research into Higher Education Administration graduate programs has been about the quality of the programs. Are the programs relevant to the needs of the field? Is the curricular content educating graduates in those practices and theories they will face in the field? A good example of this type of research comes from Veronica Chukweumeka (2004). Her study assessed the review process for determining quality and accountability of two doctoral programs in Higher Education Administration. Conclusions from the study showed that these two programs initiated a review process for three main reasons: a) program improvement, b) resource reallocation, and c) program justification to protect existing resources.

Although this section shows an ample amount of literature looking at higher education as a field of study, we are still lacking in close analyses of what is actually going on in these doctoral programs. As stated by John Lauwery's, the Chief Registrar of the University of Southampton

Whatever happens, it is safe to predict that the future of higher education must be bright over coming years. We will increasingly be dominated by the knowledge society that will rely on more and more sophisticated IT systems and become increasingly international in character. The need to extend the boundaries of understanding and to transmit ever more complex knowledge to growing numbers of people cannot be in doubt. That will require the highest quality management and the most capable

higher education managers. That must be an encouraging prospect for the future of the profession of higher education management.

This demands that researchers and practitioners continue to inquire about what is going on in the field of higher education administration/leadership.

### RESEARCH DESIGN

The objective of this research was to conduct a demographic study of all graduate programs offered in Higher Education Administration throughout the United States. The effort is to create a broad picture of the current context of this educational field of study. So in order to collect data for this study, the researcher individually visited every institutional website per state and conducted a manual search to determine if they offered a graduate program related to a study of Higher Education Administration or something similar. It is important to have a national understanding of what information is available or not available to potential students as they make decisions about which program to pursue. Since many potential students now use the internet to access information regarding these programs, the researcher recognized that this would be a valid approach for collecting data about the current context of doctoral programs in higher education administration. Using websites is exactly how the majority of potential students would access this information as well.

### THE DATA

The researcher used the following variables for collecting data related to these programs.

Demographics	Application Requirements	Program Structure
State	Online Application Form available	Program Delivery Method
Institution Name	Resume Needed in application	Residency Requirement
Faculty Name	Writing Sample needed in application	Program hours to completion
Department Name	Reference letters required	Number of Required Courses
Degrees Offered	Portfolio required with application	Number of Courses available in the program
Degree Name	Admission Deadline Date	Number of Research Courses needed
Higher Education Administration Focus or Student Affairs Focus	Undergraduate GPA needed	Dissertation hours needed
Mission/Purpose listed on website	GRE score	Candidacy/Comprehensive Exam
Number of Faculty		Thesis or Final Project
Number with PhD		Years to completion available
Number with EdD		
Graduate Student data		
Year Program Established		
Number of hits to find the website from Institutional homepage		

The data collected for this research came only from institutions that hold a university designation including both private and public universities in the United States.

# of Universities per State		# of HEA Programs	% to State total
Alabama	17	1	5%
Alaska	4	0	0%
Arizona	9	2	22%
Arkansas	13	1	8%
California	66	6	9%
Colorado	10	3	30%
Connecticut	12	2	17%
Delaware	2	0	0%
District of Columbia	10	1	1%
Florida	25	11	44%
Georgia	22	3	14%
Hawaii	4	0	0%
Idaho	5	2	40%
Illinois	33	9	27%
Indiana	24	5	21%
Iowa	11	3	27%
Kansas	15	2	13%
Kentucky	13	4	31%
Louisiana	15	1	7%
Maine	8	1	13%
Maryland	12	2	17%
Massachusetts	11	4	36%
Michigan	22	6	27%
Minnesota	19	2	11%
Mississippi	7	4	57%
Missouri	25	5	20%
Montana	5	1	20%
Nebraska	6	2	33%
Nevada	2	1	50%
New Hampshire	3	0	0%
New Jersey	13	2	15%
New Mexico	9	1	11%
New York	33	6	18%
North Carolina	21	6	29%
North Dakota	6	1	17%
Ohio	36	8	22%
Oklahoma	20	4	20%
Oregon	11	2	18%
Pennsylvania	44	10	23%
Rhode Island	5	1	20%
South Carolina	14	2	14%
South Dakota	6	1	17%
Tennessee	19	8	42%
Texas	58	10	17%
Utah	6	2	33%

# of Universities per State		# of HEA Programs	% to State total
Vermont	3	1	33%
Virginia	22	5	23%
Washington	12	2	17%
West Virginia	7	2	29%
Wisconsin	26	2	8%
Wyoming	1	1	100%
Totals	802	161	

This data indicates that there are currently 161 (or 20%) institutions offering some kind of graduate degree related to Higher Education Administration in the US. The state with the highest number of university institutions offering a degree in Higher Education Administration is Florida with 11. The next highest are Pennsylvania and Texas with 10 and then Illinois with nine institutions offering HEA programs. The state with the highest percentage of programs as compared to number of universities is Mississippi where 57% of the institutions offer an HEA program. The mean number of programs is six per state. There are also four states in which no HEA program is currently available. So on average, 92% of the states offer a graduate program related to Higher Education Administration.

Based upon the data collected for this study and the delimitations set forth to only view university websites, the following is a listing of the institutions offering some kind of graduate degree in Higher Education Administration.

State	University with HEA Program
Alabama	University of Alabama at Tuscaloosa
Alaska	None listed
Arizona	<ul style="list-style-type: none"> <li>• Arizona State University</li> <li>• University of Arizona</li> </ul>
Arkansas	<ul style="list-style-type: none"> <li>• University of Arkansas</li> </ul>
California	<ul style="list-style-type: none"> <li>• Alliant International University</li> <li>• Azusa Pacific University</li> <li>• California State University Sacramento</li> <li>• California State University San Francisco</li> <li>• Claremont Graduate University</li> <li>• Santa Clara University</li> <li>• Stanford University</li> <li>• University of California - Los Angeles</li> <li>• University of Redlands</li> <li>• University of Southern California</li> </ul>
Colorado	<ul style="list-style-type: none"> <li>• Colorado State University</li> <li>• University of Denver</li> <li>• University of Northern Colorado</li> </ul>
Connecticut	<ul style="list-style-type: none"> <li>• Central Connecticut State University</li> <li>• University of Connecticut</li> </ul>
Delaware	None Listed
District of Columbia	<ul style="list-style-type: none"> <li>• George Washington University</li> </ul>

State	University with HEA Program
Florida	<ul style="list-style-type: none"> <li>• Barry University</li> <li>• Florida Atlantic University</li> <li>• Florida International University</li> <li>• Florida State University</li> <li>• Johnson and Wales University</li> <li>• Lynn University</li> <li>• Nova Southeastern University</li> <li>• University of Central Florida</li> <li>• University of Florida</li> <li>• University of South Florida</li> </ul>
Georgia	<ul style="list-style-type: none"> <li>• Georgia Southern University</li> <li>• Mercer University</li> <li>• University of Georgia</li> </ul>
Hawaii	None Listed
Idaho	<ul style="list-style-type: none"> <li>• Idaho State University</li> <li>• University of Idaho</li> </ul>
Illinois	<ul style="list-style-type: none"> <li>• Benedictine University</li> <li>• Chicago State University</li> <li>• Illinois State University</li> <li>• Loyola University</li> <li>• National-Louis University</li> <li>• Northeastern Illinois University</li> <li>• Northern Illinois University</li> <li>• Northwestern University</li> <li>• University of Illinois – Urbana Champaign</li> </ul>
Indiana	<ul style="list-style-type: none"> <li>• Ball State University</li> <li>• Indiana State University - Terre Haute</li> <li>• Indiana University - Bloomington</li> <li>• Indiana University - Purdue University</li> <li>• Taylor University</li> </ul>
Iowa	<ul style="list-style-type: none"> <li>• Drake University</li> <li>• University of Iowa</li> <li>• University of Northern Iowa</li> </ul>
Kansas	<ul style="list-style-type: none"> <li>• Fort Hayes State University</li> <li>• University of Kansas</li> </ul>
Kentucky	<ul style="list-style-type: none"> <li>• Eastern Kentucky University</li> <li>• Morehead State University</li> <li>• University of Kentucky</li> <li>• University of Louisville</li> </ul>
Louisiana	<ul style="list-style-type: none"> <li>• Louisiana State University - Baton Rouge</li> </ul>
Maine	<ul style="list-style-type: none"> <li>• University of Maine- Orono</li> </ul>
Maryland	<ul style="list-style-type: none"> <li>• Morgan State University</li> <li>• University of Maryland - College Park</li> </ul>
Massachusetts	<ul style="list-style-type: none"> <li>• Harvard University</li> <li>• Suffolk University</li> <li>• U of M - Amherst</li> <li>• U of M - Boston</li> </ul>

State	University with HEA Program
Michigan	<ul style="list-style-type: none"> <li>• Central Michigan University</li> <li>• Eastern Michigan University</li> <li>• Michigan State University</li> <li>• Oakland University</li> <li>• U of M - Ann Arbor</li> <li>• U o M - Dearborn</li> </ul>
Minnesota	Capella University Minnesota State University - Mankato
Mississippi	<ul style="list-style-type: none"> <li>• Jackson State University</li> <li>• Mississippi State University</li> <li>• University of Mississippi</li> <li>• University of Southern Mississippi</li> </ul>
Missouri	<ul style="list-style-type: none"> <li>• Southeast Missouri State University</li> <li>• St. Louise University</li> <li>• U of M - Columbia</li> <li>• U of M - Kansas City</li> <li>• University of Missouri - St. Louis</li> </ul>
Montana	<ul style="list-style-type: none"> <li>• MSU - Bozeman</li> </ul>
Nebraska	<ul style="list-style-type: none"> <li>• U of Nebraska - Lincoln</li> <li>• U of Nebraska - Omaha</li> </ul>
Nevada	<ul style="list-style-type: none"> <li>• University of Nevada - Las Vegas</li> </ul>
New Hampshire	None Listed
New Jersey	<ul style="list-style-type: none"> <li>• Rowan University</li> <li>• Seton Hall University</li> </ul>
New Mexico	<ul style="list-style-type: none"> <li>• New Mexico State University - Las Cruces</li> </ul>
New York	<ul style="list-style-type: none"> <li>• Cornell University</li> <li>• New York University</li> <li>• SUNY - Buffalo</li> <li>• Syracuse University</li> <li>• University of Albany</li> <li>• University of Rochester</li> </ul>
North Carolina	<ul style="list-style-type: none"> <li>• Appalachian State University</li> <li>• East Carolina University</li> <li>• Fayetteville State University</li> <li>• Johnson &amp; Wales University</li> <li>• North Carolina State University</li> <li>• Western Carolina University</li> </ul>
North Dakota	<ul style="list-style-type: none"> <li>• North Dakota State University</li> </ul>
Ohio	<ul style="list-style-type: none"> <li>• Bowling Green State University</li> <li>• Cleveland State University</li> <li>• Kent State University</li> <li>• Ohio State University</li> <li>• Ohio University</li> <li>• University of Akron</li> <li>• University of Dayton</li> <li>• University of Toledo</li> </ul>
Oklahoma	<ul style="list-style-type: none"> <li>• North Western Oklahoma State University</li> <li>• Oklahoma State U - Stillwater</li> <li>• Oral Roberts University</li> <li>• University of Oklahoma</li> </ul>
Oregon	<ul style="list-style-type: none"> <li>• George Fox University</li> <li>• Portland State University</li> </ul>

State	University with HEA Program
Pennsylvania	<ul style="list-style-type: none"> <li>• Drexel University</li> <li>• Indiana University of Pennsylvania</li> <li>• Marywood University</li> <li>• Pennsylvania State University</li> <li>• Robert Morris University</li> <li>• Temple University</li> <li>• University of Pennsylvania</li> <li>• U of P - Pittsburg</li> <li>• Widener University</li> </ul>
Rhode Island	<ul style="list-style-type: none"> <li>• Johnson and Wales University</li> </ul>
South Carolina	<ul style="list-style-type: none"> <li>• Bob Jones University</li> <li>• Clemson University</li> </ul>
South Dakota	<ul style="list-style-type: none"> <li>• University of South Dakota</li> </ul>
Tennessee	<ul style="list-style-type: none"> <li>• East Tennessee State University</li> <li>• Middle Tennessee State University</li> <li>• Tennessee State University</li> <li>• Union University</li> <li>• University of Memphis</li> <li>• U of T - Chattanooga</li> <li>• U of T - Knoxville</li> <li>• Vanderbilt University</li> </ul>
Texas	<ul style="list-style-type: none"> <li>• Abilene Christian University</li> <li>• Sam Houston State University</li> <li>• Texas A&amp;M University - College Station</li> <li>• Texas A&amp;M University - Corpus Christi</li> <li>• Texas State University</li> <li>• Texas Tech University</li> <li>• University of Houston</li> <li>• University of North Texas</li> <li>• U of T - Austin</li> <li>• U of T - San Antonio</li> </ul>
Utah	<ul style="list-style-type: none"> <li>• University of Utah</li> <li>• Weber State University</li> </ul>
Vermont	<ul style="list-style-type: none"> <li>• University of Vermont</li> </ul>
Virginia	<ul style="list-style-type: none"> <li>• George Mason University</li> <li>• Liberty University</li> <li>• Old Dominion University</li> <li>• Regent University</li> <li>• University of Virginia</li> </ul>
Washington	<ul style="list-style-type: none"> <li>• Seattle Pacific University</li> <li>• Seattle University</li> </ul>
West Virginia	<ul style="list-style-type: none"> <li>• Shepherd University</li> <li>• West Virginia University - Morgantown</li> </ul>
Wisconsin	<ul style="list-style-type: none"> <li>• U of W - Green Bay</li> <li>• U of W - Madison</li> </ul>
Wyoming	<ul style="list-style-type: none"> <li>• University of Wyoming</li> </ul>

Each of these HEA programs are located within Education faculties. This research showed that no HEA programs existed outside of Education Faculties. This is consistent with directives set forth by the American Association of University Professors in 1938 where they

said studies in higher education should be housed in Faculties of Education. From the data collected, the most common faculty names where the Higher Education programs were housed included:

*College of Education*  
*School of Education*  
*Faculty of Education*  
*Graduate School of Education and Human Development*  
*School of Education and Human Services*

Within each of these faculties, the Higher Education programs were also situated within specific departments. The following is a list of the most common departments.

*Educational Leadership and Policy Studies*  
*Department of Higher Education and Organizational leadership*  
*Department of Administration and Interdisciplinary Studies*  
*Education Theory, Policy, and Practice*  
*Department of Educational Administration*  
*Educational Leadership and Research*  
*Department of Administration, Leadership, and Technology*

As a further element of the demographic data collected, a review of the programs showed that institutions were offering the following degrees with the focus being on the field of Higher Education:

*Masters of Science (MS)*  
*Masters of Science, Education (MSEd)*  
*Masters of Arts (MA)*  
*Masters of Education (MEd)*  
*Educational Specialist (EdS)*  
*Educational Doctorate (EdD)*  
*Doctor of Philosophy (PhD)*

Each of these degrees then had a focused speciality that was listed on the degree awarded:

*Higher Education Administration (48% of the institutions used this name)*  
*Higher Education and Organizational Change*  
*Postsecondary Administration and Student Affairs*  
*Higher Education and Community College*  
*Postsecondary Public Policy*  
*Higher Education Leadership*  
*Higher Education Administration and Policy*

*Adult and Higher Education*  
*Higher and Postsecondary Education*  
*Leadership for Higher Education*  
*Higher Education Management*  
*Educational Leadership – Higher Education*

The following data lists a breakdown of the specific types of degrees offered in Higher Education throughout the institutions reviewed for this study.

*Masters: 73 institutions or 45%*  
*EdD only: 61 institutions or 38%*  
*PhD only: 38 institutions or 24%*  
*EdD/Phd combo: 62 institutions or 39%*

One of the other core components of a graduate program is being able to understand what the program is trying to academically achieve for its students. As part of the data collected for this study, the researcher explored as to whether or not program websites were including a mission statement so potential students could see how that institution viewed higher education as a field of study. From the data collected, 87 of 161 or 54% of the programs had a mission or purpose listed on their website. In reviewing the institutional websites, the data collected showed that many of the websites told readers what the program was about, but a specific mission statement was not listed. Although this helps in understanding the management of the program, it indicates that most graduate programs of Higher Education are not sending a clear message about the theories which drive these programs. The following are some examples of mission statements that were included on institutional websites.

*Our Mission is to prepare individuals for researching, analyzing, and managing the critical problems in postsecondary education. (Penn State University)*

*To graduate doctoral, educational specialist, and master's degree students who come from diverse backgrounds and who are characterized by their competence and confidence to be effective leaders in the higher education workplace. (University of Arkansas)*

*Our mission is to provide an opportunity for participants to extend their knowledge of academic organizations, their history, clientele, administrative functions; to develop an appreciation of the political, economic and social forces that influence the decisions of educational leaders; and to gain relevant experience in higher education administration. (University of Kansas)*

In reviewing the program mission statements that were available, it became evident that Higher Education is not about “teaching” in higher education. This is very different to what

Eells (1938) indicated in his early conception of Higher Education programs. His intent was more about “college teaching” and interacting in the institution as a professor. A review of these current mission statements indicates that the current focus is not about preparing graduate students to be “educators” within postsecondary education in the traditional sense. These programs are not about faculty development or creating professors who are better classroom instructors. Instead, the overwhelming message from the mission statements is about being a leader within higher education institutions and systems. In so doing, these programs explore the theory and research related to the leadership, administrative practice, management, and delivery of all elements related to higher education institutions. This a very dynamic and diverse educational mandate.

Another demographic variable considered the general make up of faculty within graduate Higher Education programs.

Program Range: 2 – 15 (Note that the higher numbers in the range of faculty existed because the program of study was usually spread between Educational Leadership and Higher Education)

Mean was 8

Mode was 6

On average 55% of faculty held a PhD and 45% held an EdD. It is really difficult to determine the total numbers specifically in Higher Education because many of these faculty have responsibilities in multiple departments.

If we went by the Mean, it would imply that there are some 1288 faculty who work in Higher Education in some form or another. As a note, I did not collect data on female/male faculty in Higher Education. The problem here was that the data was retrieved from institutional websites and many sites only had name listings and no pictures and it is often difficult to determine gender just based on a name. I did not want to misrepresent the actual numbers.

Numbers of Students: This is based on data from The Digest of Education Statistics 2010 ([nces.ed.gov/pubs2011/2011015.pdf](http://nces.ed.gov/pubs2011/2011015.pdf))

### **Overall view**

There were a total of 827,000 graduate students enrolled in the Field of Education in the 2007-2008 academic year

Of all students enrolled in graduate education in the 2008-2009 academic year, 23.9% were in the field of education. Data on students specifically enrolled in Higher Education Administration was not included in the Digest of Education Statistics 2010 report.

In the 2008-2009 academic year, there were 656,784 Masters Degrees awarded in the US and 67,716 Doctoral Degrees awarded in the US

- In the 2008-2009 academic year, there were 178,564 Masters and 9028 Doctoral Degrees awarded in Education
- Of all Masters degrees awarded, 27.2% were in the Field of Education
- Of all Doctoral degrees awarded, 13.3% were in the Field of Education
- In the academic year 2008-2009, there were no bachelor degrees awarded in Higher Education Administration
- In the academic year 2008-2009, there were 2,065 Masters degrees awarded in Higher Education Administration. 700 were to Males and 1,365 were to Females
- In the academic year 2008-2009, there were 384 Doctoral Degrees awarded in Higher Education Administration. 161 were to Males and 223 were to Females
- On a national level, of all Masters degrees awarded, 0.31% were in Higher Education Administration. Compared to Education Masters degrees, 1.2% were in Higher Education Administration
- On a national level, of all Doctoral degrees awarded, 0.57% were in Higher Education Administration. Compared to Education Doctoral degrees, 4.3% were in Higher Education Administration

### **Year Program Established**

In terms of the year that programs were established, I could find no website information to indicate this on the various program websites. To get accurate data on this would require contacting each institution through email or phone to get this information. Due to the complexity of this, I did not pursue this further for this study.

### **Finding the Program on the Internet**

Finding the HEA program websites from the main institutional page was a fun and challenging process and only got more refined and easier after going through the search around 20 different times. With the effort that it took me, it suggests that many students will have to do quite a bit of web searching to find the information they are seeking. Ease of access to institutional information is central to building positive relationships with potential students.

### **Process to find the HEA website:**

Starting from the institution's homepage the most common hits were 5 to 7. This means you would have to go through about 6 web pages down the institutional website tree to find the HEA program

The easiest link to begin with was the "Academics" link which was available on 92% of University homepages.

From there, the next easiest link was the “Schools” or “Colleges” link.

Here you would find the “Education” link.

At this point, some websites have links listed on their homepage listing

Departments within the Faculty or School or just a Department’s link.

Some have you select between Graduate and Undergraduate Programs.

It is usually after this point that you can find the specific link for Higher Education program.

The process listed here is indicative of a typical search. Many institutional searches are much more complicated than this and required me going back and forth among pages and doing a lot of close reading to eventually find the website I needed. Based on my experiences, it would be worthwhile for chairs within Higher Education programs to work with college and university level web developers to make this process of finding the program website as easy as possible for potential students.

### **Application Process**

Online Application form:

96% of the institutions had an online application form.

Resume needed:

47% of the institutions specifically required a resume/vitae to have a complete application package. Most institutions had this information included in the application form.

Writing Sample Required:

100% of the institutions needed applicants to submit some form of writing. Common writing samples requested included a “personal statement of purpose”, an example essay from a previous class taken, or a published paper.

Reference Letters:

100% of the institutions required 3 letters of reference

Portfolio:

24% of the institutions indicated that a portfolio could be included in the application package

Undergraduate GPA:

97% of the institutions required a 3.0 GPA

GRE Score:

Required scores ranged from 1000 to 1500.

The mode score was 1200

## Program Details

### Delivery Method:

142 or 88% of the programs are on-campus delivery with evening and/or weekend classes

19 or 12% offer some kind of blended online/on campus structure

### Residency requirement:

There were two main categories here. It was either that there was no residency required or it was one full academic year. This meant being registered as a full time student for at least one academic year. It was about 73% of the institutions requiring full time enrolment for one academic year.

### Number of Required Courses:

Range: 30 - 96 credit hours

Mode: 60 Credit hours

### Number of Research Courses:

Range: 3 – 15 credit hours

Mode: 9 Credit hours

### Number of Dissertation Hours

Range: 9 -15 credit hours

Mode: 12 Credit Hours

### Candidacy/Comprehensive Exam:

88% of institutions required a candidacy or comprehensive exam. Note: this could be slightly higher as several institutions did not provide this information on their website.

### Years to completion:

All programs or 100% listed 7 years available to complete the degree.

## CONCLUDING REMARKS

In considering the process of collecting this data and what it says about higher education as a field of study within graduate programs, I must reflect back on the words of Paul Dressel (1974, cited in Harclerod) in a similar study he conducted:

Our survey demonstrates that higher education as a degree-granting program has reached significant dimensions in offerings, in specialities provided, in degrees available, in faculty, in degrees already awarded, and in current enrollments. (p. 35)

This is still the current state of higher education programs across the United States. I found it very telling at just how many higher education institutions offer this specialty program.

Pretty much every state offers a degree within the area Higher Education Administration. It suggests that the program is a legitimate entity both for the content and theory which it explores and for students wanting to study and research it. Another element that came out of this study was that these programs remain within Faculties or Colleges of Education. If one considers that the mission of the programs is to focus on the “leadership” or “administrative” side of higher education, it would not be too far-fetched to begin to house these programs within Business Schools for example. It sends a message that the theories of higher education are unique and have their own history that is separate from “business” theories of leadership or management. As such, these graduate programs remain within the faculties where they most align - Education. Overall, this is a philosophical shift from the beginning conceptions of Higher Education programs in the early part of the 1900s where it was more about training “college professors”. I couldn’t help but also reflect on just how complex the topic of Higher Education is. This was evident in the degree names that institutions are using for their Higher Education programs. There are some programs that cover the whole spectrum of adult and higher education where others are very focused on higher education management. It would be interesting to find out what decision making went into determining program names at particular institutions. Like Dressel, I also found it very difficult to determine exact numbers of faculty who have Higher Education as their focused field of study and teaching. The difficulty here is that many of these programs are blended with Educational Leadership (K-12) programs and so faculty have responsibilities with both. Due to this fact, I don’t think we will ever have accurate numbers. As mentioned in the body of the paper, it was unfortunate that only 54% of the institutions had a specific mission statement for their higher education programs. If academics want students and administrators to know that the programs are strengthened by the theories of higher education, it is essential that we work from mission statements that drive this vision and not get caught into the “how to’s” of the programs. Basing Higher Education programs on “what we are about” is a very surface perspective. Establishing mission statements (and advertising them) that are founded on core theoretical frameworks of higher education will help to further legitimize this field of study.

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# **LEADERSHIP EDUCATION AND GENDER ROLES: THINK MANAGER, THINK “?”**

**LeAnne Coder, Western Kentucky University  
M. Shane Spiller, Western Kentucky University**

## **ABSTRACT**

*Since the early 1970s the issue of gender stereotypes and leadership characteristics has been a much researched topic in the management literature. However, much of the research used to create this knowledge foundation was conducted using a questionable base. This, in turn, has led to at least three divergent views on the effects of gender and gender roles and leadership development, all of which can be found in current educational materials. This paper looks at the consequences of this shaky foundation and its long lasting impact on leadership development education. Although this paper focuses on gender issues in leadership development, this cautionary tale could be applied to many issues in management research when researchers fail to periodically re-examine the bases of any research stream.*

## **INTRODUCTION**

It has been nearly 40 years since the origination of the concept of “Think Manager, Think Male” in Virginia Schein’s original article on the characteristics of managers and gender stereotypes (Schein, 1973). At the time of Schein’s article, women accounted for about 5% of managers in organizations (Schein, 1973). According to a 2009 report by the United States Bureau of Labor Statistics, women held about 40% of management jobs in the United States; however only 2% of organizations listed in the Fortune 500 had CEOs that were women. While women have made progress into the lower and middle levels of management, they are still disproportionately excluded from the upper levels of organizations. A cause for this could still be blatant discrimination against women. We argue that this disproportionate representation may relate (at least in part) to the type of information students receive while studying management and leadership development.

One heavily researched area in leadership relates to gender role stereotypes. This research has resulted in three different research-based perspectives presently found in both textbooks and popular press works. The first view was established by Schein (1973, 1975) and Powell and Butterfield (1979, 1989, 2002) and is “Think manager, think male (or masculine)” which originated in the 1970s. The second perspective “Think manager, think female” was highlighted by research work done by Eagly, Helgesen, and Rosener in the late 1980s and 1990s. An additional third perspective, “There is no difference between men and women and

management characteristics” was summarized by Vecchio (2002, 2007). This perspective states that the leadership characteristics of men and women are indistinguishable. These three conflicting perspectives are all present in today’s educational materials for leadership, sending educators on a confusing voyage of trying to figure out what is most current and should be included in class materials and discussions.

Recently, Burke and Rau (2010) argued for bridging the research-teaching gap. One of their suggestions included selecting textbooks that integrate research findings. An underlying assumption of their argument would be that educators should read the published research, so that they are able to select books that are current. In the management field this would require instructors to maintain currency in far-reaching areas. An additional assumption of their suggestion is that those trained in reading and understanding academic research choose the books, when quite often textbooks are chosen by professional teachers at community colleges, or other institutions that do not emphasize research skills.

Management and leadership instructors look for guidance from researchers, practitioners, and textbooks regarding the skills that aspiring leaders need. Conflicting directions in the research, or worse, guidance based on faulty or outdated research can have lasting effects on those who learn the faulty information. Potentially, this issue can be compounded in leadership research as some highly influential research can cross over into the popular press, influencing the media, and other mainstream resources, resonating far beyond the classroom. This paper provides an extensive literature review of gender and gender roles in leadership to point out methodological flaws in previous research in addition to changes in socio economic and cultural factors. The survey instruments discussed have been used or cited in over 5,000 academic articles. These survey instruments have created the foundation for gender and leadership issues. Our arguments will show a need for new research and measurement tools to assess gender roles in leadership education. Although we are focusing on these types of issues in the leadership arena, we realize that this phenomenon is not exclusive to this area, and can likely be found in many areas of management research.

### **Views on Gender Roles**

Women’s roles in society have changed considerably in the last 40 years. Gender roles and stereotypes have been smashed as more women than men are now in college (National Center for Education Statistics, n.d.) and they are now certain of professional opportunities in fields that were previously off limits. As educational and professional opportunities for women have increased, egalitarian attitudes toward gender roles have also increased (Harris & Firestone, 1998). In addition, many men are now raised in a single parent or dual-income home which allows them to see women in a different light than men from previous generations (Vogel, Broverman, Broverman, Clarkson, and Rosenkrantz, 1970). These cultural changes have led to a

weakening in the traditional masculine and feminine gender role perceptions that existed in the 1950s and 1960s.

### **Gender Roles in Leadership Education**

As previously discussed, cultural differences and societal changes have caused the differences in the gender roles for men and women to become blurred. Many traits previously associated with men are now embraced and recognized in women and (to a lesser extent) feminine characteristics are recognized in men. Unfortunately, it appears that research in the area of leadership education and gender roles has not kept up with those changes. Instructional information presented in textbooks today is based on instruments that were developed in the 1970s and have not been modified to reflect these changes. As a result, many students may be incorrectly instructed on what characteristics are needed to be a good leader.

### **THINK MANAGER, THINK MALE: THE SCHEIN DESCRIPTIVE INDEX (SDI)**

In the early 1970s, Virginia Schein examined the psychological barriers that may have been preventing women from moving into middle management. At that time, 87% of companies had women in 5% or fewer of their middle management ranks (Schein, 1973). To test a theory that sex role stereotypes were acting as a blocking factor for women's advancement, she developed the 92-item Schein Descriptive Index (SDI).

### **Development of the Schein Descriptive Index**

Items for the SDI were derived from four studies of sex role stereotypes from the 1950s and 1960s (Rosenkrantz, Vogel, Bee, Broverman & Broverman, 1968; Brim, 1958; Bennett & Cohen, 1959; Brenner, 1970). Participants in these studies included 5 and 6 year-old children, undergraduate students, and adults. Each of these studies was conducted between 5 and 15 years prior to Schein's work and thus reflected thinking about gender roles and stereotypes from the 1950s and late 1960s.

In Schein's initial 1973 study, 300 male middle managers were asked to describe what they thought women in general, men in general, or successful middle managers were like. Results showed that on 60 of the 86 significant items (six items did not have significant results) the characteristics of middle managers more closely resembled men in general than women in general. In addition, eight of the items showed that women in general were more similar to successful managers. The remaining 18 items showed no relationship between sex role stereotypes and perceptions of managerial characteristics indicating that the means for women and men were significantly different from those of successful managers but there were no significant differences between the mean ratings of women and men. Her study showed that sex-

role stereotypes enhanced the perception of women as being less qualified than men for high-level management jobs and that successful middle managers had characteristics, attitudes and temperaments that were more commonly used to describe men than women (1973). Her study also showed that women (even those with dominant personality types) often subsumed leadership to men to be consistent with their gender role and maintained a feminine self-image. The concept of “Think Manager, Think Male” was born.

In a follow-up study in 1975, Schein replicated her 1973 study using 167 female middle managers, results from this study also showed “Think Manager, Think Male”, but to a lesser extent than the 1973 study. Schein found significant group effects for 81 items - 39 of those showed ratings of managers were more similar to those of men while 14 of the items showed women more similar to managers. The remaining 28 showed no relationship between sex role stereotypes and perceptions of managerial characteristics. Table 1 lists the items on the Schein Descriptive Index and shows the items from the SDI that showed agreement between men managers and women managers (1973 and 1975 studies). Table 2 shows the items on which the groups differed in their opinions of these characteristics. This comparison has never before been published and shows how men and women felt differently about the characteristics that they felt were necessary to be a successful manager in the 1970s.

### **The SDI in Management Research**

Variations on the replication of Schein’s original 1973 work include a study of 268 male managers conducted in 1989 by Heilman, Block, Martell, and Simon. Results of this study “closely paralleled those of the earlier study, indicating that men in general still are described as more similar to successful managers than are women in general” (p. 935). Also in 1989 Schein, in conjunction with Brenner and Tomkiewicz, conducted a study of 420 men and 173 women managers. Interestingly, results showed that while the surveyed male managers continued to see managers being more similar to men in general, female managers no longer sex-typed the job of manager. By 1995, Dodge, Gilroy, and Fenzel concluded that the pendulum, as far as women were concerned, had swung in the opposite direction. Women now saw successful managers as being more similar to women in general than men in general while the men in their study continued to believe “Think Manager, Think Male.” A more recent study conducted by Duehr and Bono (2006) showed a change in the perceptions of male managers toward women in management. Men in their study rated the sexes more similarly with respect to management characteristics while women continued to rate the characteristics of successful managers as being more similar to women (similar to Dodge et al., 1995).

<b>Table 1: SDI Items that Showed Agreement between Men (1973) and Women (1975)</b>		
	<b>1973</b>	<b>1975</b>
<b>Attribute</b>	<b>Men</b>	<b>Women</b>
Adventurous	M <sup>a</sup>	M <sup>a</sup>
Aggressive	M <sup>a</sup>	M <sup>a</sup>
Ambitious	M <sup>a</sup>	M <sup>a</sup>
Assertive	M <sup>a</sup>	M <sup>a</sup>
Authoritative	M <sup>a</sup>	M <sup>a</sup>
Aware of Feelings of Others	W <sup>b</sup>	W <sup>b</sup>
Bitter	N <sup>c</sup> (Not)	N <sup>c</sup> (Not)
Competent	N <sup>c</sup>	N <sup>c</sup>
Competitive	M <sup>a</sup>	M <sup>a</sup>
Courteous	N <sup>c</sup>	N <sup>c</sup>
Dawdler and Procrastinator	N <sup>c</sup> (Not)	N <sup>c</sup> (Not)
Deceitful	N <sup>c</sup> (Not)	N <sup>c</sup> (Not)
Decisive	M <sup>a</sup>	M <sup>a</sup>
Demure	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Desire to Avoid Controversy	N <sup>c</sup> (Not)	N <sup>c</sup> (Not)
Desires Responsibility	M <sup>a</sup>	M <sup>a</sup>
Devious	N <sup>c</sup> (Not)	N <sup>c</sup> (Not)
Dominant	M <sup>a</sup>	M <sup>a</sup>
Exhibitionist	N <sup>c</sup> (Not)	N <sup>c</sup> (Not)
Fearful	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Feelings Not Easily Hurt	M <sup>a</sup>	M <sup>a</sup>
Firm	M <sup>a</sup>	M <sup>a</sup>
Forceful	M <sup>a</sup>	M <sup>a</sup>
Frivolous	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Generous	NS <sup>d</sup>	N <sup>d</sup> S
Hasty	N <sup>c</sup> (Not)	N <sup>c</sup> (Not)
Helpful	W <sup>b</sup>	W <sup>b</sup>
Hides Emotion	M <sup>a</sup>	M <sup>a</sup>
High Self-Regard	M <sup>a</sup>	M <sup>a</sup>
Humanitarian Values	W <sup>b</sup>	W <sup>b</sup>
Independent	M <sup>a</sup>	M <sup>a</sup>
Intelligent	N <sup>c</sup>	N <sup>c</sup>
Interested in Own Appearance	M (Not)	M (Not)
Intuitive	W <sup>b</sup>	W <sup>b</sup>
Leadership Ability	M <sup>a</sup>	M <sup>a</sup>
Neat	W <sup>b</sup>	W <sup>b</sup>
Not Uncomfortable about being aggressive	M <sup>a</sup>	M <sup>a</sup>
Objective	M <sup>a</sup>	M <sup>a</sup>
Passive	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Persistent	N <sup>c</sup>	N <sup>c</sup>
Quarrelsome	N (Not)	N (Not)
Self-Confident	M <sup>a</sup>	M <sup>a</sup>

	<b>1973</b>	<b>1975</b>
<b>Attribute</b>	<b>Men</b>	<b>Women</b>
Self-Controlled	M <sup>a</sup>	M <sup>a</sup>
Selfish	N <sup>c</sup> (Not)	N <sup>c</sup> (Not)
Self-Reliant	M <sup>a</sup>	M <sup>a</sup>
Sentimental	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Shy	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Skilled in business matters	M <sup>a</sup>	M <sup>a</sup>
Sociable	NS <sup>d</sup>	NS <sup>d</sup>
Speedy Recovery from Emotional Trauma	M <sup>a</sup>	M <sup>a</sup>
Strong Need for Social Acceptance	N (Not)	N (Not)
Submissive	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Talkative	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Timid	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Understanding	W <sup>b</sup>	W <sup>b</sup>
Values Pleasant Surroundings	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Vigorous	M <sup>a</sup>	M <sup>a</sup>
Vulgar	W <sup>b</sup> (Not)	W <sup>b</sup> (Not)
Wavering in Decision	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)

<sup>a</sup>M = Managers more similar to Men  
<sup>b</sup>W = Managers more similar to Women  
<sup>c</sup>N = Sex Role Stereotypes not related to management characteristics; both of the mean ratings for men and women were significantly different from those of managers but there were no significant differences between men and women.  
<sup>d</sup>NS - Results not significant

<b>Attribute</b>	<b>1973 Men</b>	<b>1975 Women</b>
Analytical Ability	M <sup>a</sup>	N <sup>c</sup>
Cheerful	NS <sup>d</sup>	W <sup>b</sup>
Consistent	M <sup>a</sup>	N <sup>c</sup>
Creative	N <sup>c</sup>	W <sup>b</sup>
Curious	N <sup>c</sup>	M <sup>a</sup>
Desire for Friendship	N <sup>c</sup> (Not)	M (Not)
Direct	M <sup>a</sup>	N <sup>c</sup>
Easily Influenced	M <sup>a</sup> (Not)	N <sup>c</sup> (Not)
Emotionally Stable	M <sup>a</sup>	N <sup>c</sup>
Fearful	M <sup>a</sup> (Not)	M <sup>a</sup> (Not)
Frank	M <sup>a</sup>	NS <sup>d</sup>
Grateful	NS <sup>d</sup>	W <sup>b</sup>
High Need for Autonomy	M <sup>a</sup>	W <sup>b</sup> (Not)
High Need for Power	M <sup>a</sup>	W <sup>b</sup> (Not)
Industrious	M <sup>a</sup>	N <sup>c</sup>

<b>Table 2: SDI Items that Showed Disagreement between Men (1973) and Women (1975)</b>		
<b>Attribute</b>	<b>1973 Men</b>	<b>1975 Women</b>
Kind	M <sup>a</sup> (Not)	NS <sup>d</sup>
Knows the way of the world	M <sup>a</sup>	NS <sup>d</sup>
Logical	M <sup>a</sup>	N <sup>c</sup>
Modest	NS <sup>d</sup>	W <sup>b</sup>
Nervous	M <sup>a</sup> (Not)	N <sup>c</sup> (Not)
Not Conceited About Appearance	M <sup>a</sup>	N <sup>c</sup>
Obedient	NS	W <sup>b</sup>
Passive	M <sup>a</sup> (Not)	M <sup>a</sup>
Prompt	M <sup>a</sup>	N <sup>c</sup>
Reserved	M <sup>a</sup> (Not)	NS <sup>d</sup>
Sophisticated	W <sup>b</sup>	NS <sup>d</sup>
Steady	M <sup>a</sup>	N <sup>c</sup>
Strong need for Achievement	M <sup>a</sup>	NS <sup>d</sup>
Strong Need for Monetary Rewards	M <sup>a</sup>	W <sup>b</sup> (Not)
Strong Need for Security	M <sup>a</sup> (Not)	N <sup>c</sup> (Not)
Sympathetic	M <sup>a</sup> (Not)	W <sup>b</sup>
Tactful	N <sup>c</sup>	W <sup>b</sup>
Uncertain	M <sup>a</sup> (Not)	N <sup>c</sup> (Not)
Well Informed	M <sup>a</sup>	N <sup>c</sup>
<b>Table Notes</b>		
<sup>a</sup> M = Managers more similar to Men		
<sup>b</sup> W = Managers more similar to Women		
<sup>c</sup> N = Sex Role Stereotypes not related to management characteristics; both of the mean ratings for men and women were significantly different from managers but there were no significant differences between men and women		
<sup>d</sup> NS = Results not significant		

Schein's original 1973 work has been cited over 900 times and her subsequent 1975 work over 600 times (Google Scholar, July 2012). Articles with references to Schein appear in several top-tiered journals such as the Journal of Management, the Journal of Applied Psychology, the Academy of Management Journal and the Academy of Management Review. Use of the Schein Descriptive Index appears in the above mentioned journals as recently as 2011 (Ryan, Haslam, Hersby & Bongiorno).

Even though Schein's work has been extensively referenced, very little empirical investigation into the Schein Descriptive Index instrument itself exists. In fact, relatively few studies use the SDI itself. This may be due, in part, to the full instrument not being published in any academic journal. Researchers needed to contact Dr. Schein to get a copy of the instrument. However, in 1974, an instrument that allowed researchers to easily evaluate sex role stereotypes in management was published and readily available: the Bem Sex Role Inventory.

**THINK MANAGER, THINK MALE: THE BEM SEX ROLE INVENTORY (BSRI)**

In 1972, Sandra Bem and several of her students at Stanford University began work on an instrument that could be used to evaluate the mental health of individuals with the belief that those who were androgynous would be healthier than “sex typed” individuals. The group created a list of approximately 200 personality characteristics that seemed to be positive in value and either masculine or feminine in tone. They also created a second list of 200 characteristics that seemed to be neither masculine nor feminine in tone. Of these “neutral” characteristics, half were positive in value and half were negative (Bem, 1974). Then 100 Stanford undergraduates were asked to rate on a scale of one to seven the desirability in American society of each of the 400 characteristics (i.e. as being “desirable for a man” or “being desirable for a woman”). Each judge rated only “for a man” or “for a woman.” No judge rated both “for a man” and “for a woman.”

**Table 3: The Masculine and Feminine Scales of the BSRI**

Masculine Items	Feminine Items
Acts as a leader	Affectionate
Aggressive	Cheerful
Ambitious	Childlike
Analytical	Compassionate
Assertive	Does not use harsh language
Athletic	Eager to soothe hurt feelings
Competitive	Feminine
Defends own beliefs	Flatterable
Dominant	Gentle
Forceful	Gullible
Has leadership abilities	Loves children
Independent	Loyal
Individualistic	Sensitive to the needs of others
Makes decisions easily	Shy
Masculine	Soft-spoken
Self-Reliant	Sympathetic
Self-Sufficient	Tender
Strong personality	Understanding
Willing to take a stand	Warm
Willing to take risks	Yielding

A personality characteristic was classified as “masculine” if it was judged to be significantly more desirable for a man than for a woman ( $p < .05$ ). Likewise, a “feminine” characteristic was found to be more desirable for a woman than for a man. Of the characteristics meeting these criteria, 20 were chosen for the Masculinity scale and 20 were selected for the

Femininity scale. These characteristics chosen for the Masculine and Feminine scales are shown in Table 3.

The BSRI treats masculinity and femininity as two independent dimensions and makes it possible to characterize a person as masculine, feminine, androgynous (high in both masculinity and femininity), or undifferentiated (low in both masculinity and femininity). In her concluding remarks, Bem states “It is hoped that the development of the BSRI will encourage investigators in the areas of sex differences and sex roles to question the traditional assumption that it is the sex-typed individual who typifies mental health and to begin focusing on the behavioral and societal consequences of more flexible sex-role self-concepts. In a society where rigid sex-role differentiation has already outlived its utility, perhaps the androgynous person will come to define a more human standard of mental health” (1974, p. 161).

### **The BSRI and Leadership Research**

Researchers used the BSRI in a wide range of fields to indicate gender roles and their relationships to behaviors and traits of interest. The scale was highly influential in the areas of leadership and management. Bem’s original article has been cited over 6,300 times (Google Scholar, July 2012). Researchers were intrigued by the possibilities of gender roles as an explanation for gender-related differences in leadership and management, especially since gender itself was not showing much promise (Osborn & Vickers, 1976; Powell, 1990).

In 1979, Powell and Butterfield initiated a very important line of research. They used the BSRI with students in multiple studies and published journals such as in the *Academy of Management Journal* (1979), *Sex Roles* (1984), *Group and Organizational Studies* (1989), *Journal of Management* (Powell, Butterfield & Parent, 2002), and a book - *Women and Men in Management* (Powell & Graves, 2003). Each of these studies followed a similar pattern to explore perceptions about leadership. Business students were used, completing the survey for themselves and for an imagined “good” manager. Results over the years generally indicated that perceptions of good managers were related to the masculine classification of the BSRI over the feminine or androgynous classification. An additional study looked at the link of the BSRI’s sex roles to leadership styles (Inderlied & Powell, 1979). Several of these studies have been subsequently referenced 100 – 200 times while the book by Powell and Graves has been cited over 700 times (Google Scholar, April 2011).

The linking of the gender roles established by the BSRI to leadership and management characteristics has also been explored by many other researchers. Some examples include the work of Korabik (1982a, 1982b, 1982c). In three separate articles, each using an undergraduate student sample and each published in 1982, Korabik reported who reported that masculine gender roles were more closely related to initiating structure than gender (1982a, 1982b) and that a feminine role was related to consideration (1982b), and finally that raters reported less likeability for masculine and androgynous leaders than feminine leaders (1982c). Cann and

Siegfried (1990) also linked feminine gender roles to consideration behaviors. Other studies have used the BSRI to explore the effects of gender role on emergent leadership (Goktepe & Schneier, 1989; Kent & Moss, 1994; Kolb, 1999). The first study, showed that in 62% of the groups that had at least one person classified as masculine the emergent leader was also classified as masculine. This number was much higher than that found for feminine leaders (27%), for androgynous leaders (25%), and for undifferentiated leaders (27%). Kent and Moss (1994) measured leader emergence using a self and peer rating scale. Their results indicated that both androgynous and masculine individuals scored higher on both self and peer ratings. They found no differences between androgynous and masculine subjects, or between feminine and undifferentiated subjects. Hall, Workman, and Marchioro (1998) used the BSRI to identify subjects who were androgynous. They then used that gender-role as an indicator of behavioral flexibility. When androgyny was considered with other measures of behavioral flexibility a significant amount of variance in leader perceptions was explained. Additionally, they reported regression results for gender roles as predictors of emergent leadership, with significant results for masculinity scores only. Kolb (1999) again found that masculinity correlated with leader emergence, and that leaders were most often classified as masculine or androgynous. More recently Turetgen, Unsal & Erdem (2008) expanded this line of study to emergent leadership in teams in Turkey, finding no result for gender or BSRI indicated gender role. Gershenoff and Foti (2003) used the BSRI to examine leadership emergence in all female groups assigned to either a task that required initiating-structure behaviors or a task requiring consensus-building behaviors. They found evidence that androgynous persons led to better leadership perceptions across both conditions, and that subjects rated as masculine and androgynous emerged as leaders while feminine subjects did not.

Despite the findings of Powell and Butterfield that androgyny was not related to “good managers,” and the negative result for androgyny found by Baril, Elbert, Mahar-Potter & Reavy (1989) the concept of androgyny has continued to capture the thoughts of leadership researchers. Korabik (1990) and Park (1997a) both made a call for the gender role of androgyny as a way to overcome negative sex-stereotyping in the workplace. Maier (1993) reported that the typical manager was seen as masculine, and the ideal manager was seen as androgynous. Park (1997b) reported some evidence that an androgynous style might be better for organizations. Hackman, Furniss, Hills, & Paterson (1992) examined the relationship between gender roles and transformational and transactional leadership; their results indicated that transformational leaders displayed characteristics of both masculinity and femininity. A follow-up study (Hackman, Hills, Paterson & Furniss, 1993) examined satisfaction with leadership and leadership effectiveness as correlated with gender roles reporting positive relationships regardless of gender role for leadership satisfaction; however femininity was related to leadership effectiveness for males only.

In other work-related research Jolson and Comer (1992) used the BSRI scale to predict effectiveness of industrial saleswomen. Comer and Jolson (1985) used the scale to assess

relationships with career choice. Korabik and Van Kampen (1995) examined the scale's relationship to job stress, and Bisking, Ree, Green and Odom (2003) used the scale to explore patterns of disciplinary actions, Kracher, Chattejee and Lundquist (2002) used the BSRI to examine moral development in business students and business professionals in India and the United States.

The vast majority of the research exploring gender roles and management/leadership has relied on convenience samples of students. All of the studies in the Powell line of research have both an undergraduate sample, and a sample of part-time MBA students. Moss and Kent (1996) used only MBA students in their sample. Many of the other studies used only undergraduate students for their research.

However, results of a study by Helson and Moane (1987) suggest that women college graduates are more "feminine" during their 20s but become more assertive and confident during their 40s. This raises the question of how gender role perceptions change as we age, and how much we should generalize from this group of studies.

Research using the BSRI reinforced the concept of "Think manager, think male (or masculine). However, researchers ignored or were ignorant of the many issues with the BSRI itself which greatly undermines the integrity of the instrument itself. According to Frable (1989) the BSRI is often used incorrectly and without sufficient attention to its theoretical framework. As a reminder, the BSRI was originally created to measure androgyny and mental health.

## **STATISTICAL AND SOCIETAL ISSUES WITH THE BSRI AND THE SDI**

The world has changed considerably since the development of the BSRI and SDI which has created problems with several of the adjectives on these instruments. In addition, methodological and statistical issues have been uncovered.

### **Methodological Issues with the BSRI**

In contrast to the SDI, the BSRI received extensive study since its publication in the early 1970s. A significant portion of that research brings into question the validity of the instrument. The first major issue is a lack of adequate and consistent explanations of what the BSRI is intended to measure as well as the definitions of femininity and masculinity. Lippa (1985), Payne (1985), Spence (1984, 1985, 1991), and Hoffman and Borders (2001) raised concerns regarding the construct validity of the instrument. A study by Myers and Gonda (1982) questioned the content and the process validities of the BSRI and showed that it failed to support either of these. Wong, McCreary and Duffy (1990) revealed that while the BSRI is reliable, it lacks clear convergent and discriminant validity and questioned Bem's contention that masculinity and femininity are orthogonal constructs.

Another problem with the BSRI is the factor structure of the items. The BSRI categorizes the items as either masculine or feminine. Many studies of this structure have not been able to break these items into two clean factors. For example, Pedhazur and Tetenbaum's (1979) factor analysis revealed three factors (one feminine and two masculine). In addition, a meta-analysis of 23 studies by Choi and Fuqua (2003) indicated that most of the studies showed two to four factors – typically with one feminine factor and two to three masculine factors. On average these factors only accounted for 5-20% of the total variance. These authors point to Bem's approach to construct development as a reason for the failure of these studies to find one masculine and one feminine factor and that the constructs of masculinity and femininity are not adequately operationalized in the BSRI (Choi, Fuqua & Newman, 2008; Pedhazur & Tetenbaum, 1979).

### **Issues with Items on the BSRI and the SDI**

In addition to factor structure issues, the actual items on the BSRI have been questioned. Analyses have shown that the items “masculine” and “feminine” best distinguished males from females and alone could be used to measure masculinity and femininity on the BSRI and that the other 38 “neutral” traits provided little additional information (Wheless & Dierks-Stewart, 1981; Ballard-Reisch & Elton, 1992; Hoffman & Borders, 2001; Choi, et al., 2008). Also, it may also be that the two terms from the masculine scale of the BSRI - “has leadership ability” and “acts like a leader” – may have influenced the studies whose results showed “Think Manager, Think Male.” Of course individuals want leaders to have leadership ability and act like leader.

The items on SDI also have received criticism although not nearly as extensive as that of the BSRI. Duehr and Bono (2006) expressed a concern with the items on the SDI and how they relate to leadership and management in today's organizations. The items on the SDI exhibit a task-oriented view of leadership which was very common during the 1970s but may now provide a limited description of men, women, and managers. In an effort to remedy this, Duehr and Bono added several adjectives to the SDI for their study which, they felt, reflected both relationship-oriented and transformational characteristics that are necessary for today's leaders.

### **Societal Changes that Have Created Issues with both the SDI and the BSRI**

A major issue with using the both the BSRI and the SDI is that the constructs of “masculine” and “feminine” seem to have changed since the 1970s. Schein and Bem created their instruments during a time when men were in management and working women were usually secretaries. Women held these low level positions until they could get married and become corporate wives (Kanter, 1977). In addition, many of the participants in the original

studies by Schein (1973) and Bem (1974) were born in the 1950s, a time with highly gendered messages (Twenge, 1997).

In addition, cultural differences may define different gender role expectations for women and men. Some societies prescribe differentiated roles between men and women while other societies prescribe overlapping or egalitarian roles (Emerich, Denmark, & Hartog, 2004). Auster and Ohm (2000) and Harris (1994) showed that the characteristics from the BSRI were less valid for Latino and African Americans. Konrad and Harris' (2002) study of gender role expectations of African Americans and European Americans found that the desirability of the characteristics varied by location in the U.S. and by race. In addition, a study that looked at the BSRI in the United Kingdom determined that a masculine/feminine factor structure was a very poor fit for the data (Colley, Mulhern, Maltby & Wood, 2009). These authors believe that their results are due to the current socio-cultural context for young people in the UK. Interestingly, the U.K. scored above the U.S. in a survey of how men and women in these countries viewed the equality of men and women showing that the U.K. is a more egalitarian society than the U.S. However, a study of workers in India, Germany, and Australia showed that "think manager, think male" was still believed by German women and male participants from all three countries, but women from Australia and India held more egalitarian views of leadership (Sczesny, Bosak, Neff & Schyns, 2004).

Finally, it seems that men and women really do not view themselves as being that different from each other. Research has shown that even though men rate themselves as "masculine" and women as "feminine" it is very difficult to classify the other 38 characteristics as either "masculine" and "feminine" when people use them to rate the level of the characteristic present in themselves. When self-ratings are used, the values for the other characteristics for men and women are very similar to each other (Pedhazur & Tetenbaum, 1979; Choi et al., 2008). Women's increased endorsement of masculine-stereotyped traits has led to most masculine traits being seen as desirable for both men and women (Twenge, 1997; Wheelless & Dierks-Stewart, 1981; Pedhazur & Tetenbaum, 1979; Williams & Best, 1990; Diekman & Eagly, 2000). This change seems to be strongest among women because men still endorse "masculine" characteristics over "feminine" characteristics for themselves (Sczesny, 2003; Palan, Areni, & Kiecker, 1999).

This lack of gender characteristic distinction was revealed again by Auster and Ohm (2000). They reported the top 15 traits wished for by women included eight "masculine" traits and five "feminine" traits. The top five included four masculine traits (independent, individualistic, defends own beliefs, and self-sufficient) and one feminine trait (loyal). The top 15 desired characteristics for men included 10 masculine traits and five feminine traits. Among the top five traits three were masculine (defends own beliefs, willing to take a stand, and independent) and two were feminine (loyal and understanding). Interestingly, 13 of the top 15 traits were the same for both men and women in the study. In general, male and female

respondent's ratings of traits for themselves indicate that they ideally wish to have relatively similar traits and include a mix of both masculine and feminine characteristics.

However, even with these structural, methodological, and cultural issues, both the SDI and the BSRI continue to be used by researchers. All of these issues may have led to false and inadequate conclusions on many studies which, in turn, may have worked their way into books and educational materials on gender roles and leadership issues.

### **Research Using the SDI and the BSRI Work into the Mainstream**

Texts and popular press books regarding leadership during the 1970s reflected the notion of the "Great Man" as the leader of organizations and paid little, if any, attention to gender issues in management. Businesses assumed that women, the frail sex, did not possess the leadership qualities necessary to be a leader or that they were simply killing time until they could get married and stay home with the kids. Male managers at that time believed that female supervisors were inferior to male supervisors and were temperamentally unfit for management (Nieva & Gutek, 1981; Kanter, 1977).

During the 1980s, the previously mentioned studies by Schein and by Powell and his colleagues started to change the tone regarding women in the workplace in the media. Women began to hear and read that in order to get ahead in business, they needed to act more like men in order to be taken seriously (Sargent, 1981). They needed to take the initiative, self-publicize, and break the rules to move up the corporate ladder (LaRouche & Ryan, 1984). From *Women, Work, and Achievement: The Endless Revolution* by Rosen (1989):

Women had to change. Traditional feminine passivity, compliance, and dependence had to be put aside and the masculine traits of competitiveness and aggressiveness put in their place. Women had to learn how to compete openly with men, to act independently and to assert themselves into the workplace when the situation required, eschewing the submissive demeanor of the traditional female. (p. 210)

Women also began to hear that a good manager was androgynous (high in both masculinity and femininity) which suggested that they had to incorporate some masculine traits in order to be taken seriously in the business world. It also meant that men needed to learn softer communication skills to be a good manager. From *The Androgynous Manager* by Alice Sargent (1981):

Today's managers need to strike a balance between personal attitudes, emotions and expressions and those qualities that promote effective work relationships. They need to be well schooled in the masculine dimensions of self-

reliance and independent decision making as well as in the feminine interpersonal skills of being trustful and open and possessing self-awareness. (p. 50)

Although an androgynous style of management makes sense intuitively (managers should be both have both feminine (communal) and masculine (agentic) traits), research showed that masculine characteristics were preferred as management characteristics. Why? Could the reason exist due to the actual items on the feminine scale of the BSRI? Not many people see successful managers as gullible, shy, childlike, or yielding which would lead to successful managers perceived as more masculine than feminine and reduce the chance that most would prefer an androgyny management style.

After educational experiences and reading the advice from books like those quoted above, women of the 1980s and 1990s were trying to act like men in order to get ahead in business. They wore “bad suits,” and “talked football” but still did not make significant inroads into leadership positions in many organizations (Nichols, 1993). So now what should they do to get ahead? A new era had emerged, championed by Alice Eagly, Sally Helgesen and Judy Rosener: the age of “Think Manager, Think Female.”

### **THINK MANAGER, THINK FEMALE**

In 1990, an article by Judy Rosener in *Harvard Business Review* and a book by Sally Helgesen began the discussion about women who had made it into management positions and how they managed people. According to these two works, women managed people in a way that appeared to be greatly different than the stereotypical male manager of the time. Rosener, using data from a survey by the International Women’s Forum (ITF), characterized women leaders as being more transformational than their male counterparts. The women in the ITF survey reported that they encouraged participation, shared information with subordinates, energized and enhanced the self-esteem of others. Rosener called this type of leadership “Interactive.”

Also in 1990, Helgesen, in *The Female Advantage: Women’s Ways of Leadership*, followed four executive women in what she called a diary study. She concluded that women tend to think of an organization in terms of a network or web of relationships with leadership at the center of the web, not at the top of the pyramid (the stereotypical male view of leadership). She also found that these women executives were very good listeners and sharers of information, and collaborative negotiators, all of which were believed to strengthen the relationships these women had with the others in her organization. Helgesen felt all of these stereotypically feminine characteristics would help to lead contemporary workers who were becoming increasingly more interested (than groups of previous employees) in intangibles of being happy and working in a good environment and less interested in salary and position.

Also in 1990 a meta-analysis by Eagly and Johnson looked at the leadership styles of men and women in organizations. Results indicated that there was a sex difference in leadership;

women had a tendency to adopt a more democratic or participative style and men tended to adopt a more autocratic or directive style. At this time, the authors were not willing to argue that women's style of leadership was either an advantage or a disadvantage.

Eagly's interest in gender differences in leadership continued in a meta-analysis she published with Karau in 1991. This analysis focused on the role of gender in emergent leadership. Results showed that in laboratory and field studies men were more likely to emerge as the leader for short-term groups and for groups that were responsible for carrying out tasks that did not require complex social interaction. For groups that interacted for longer periods of time, it was less likely that a male would lead the team. Eagly and Karau recommended, not that women act like men in order to increase leadership opportunities, but that women should try to change the norms of leadership so that the social aspects were viewed as more important. Subsequent articles by Eagly in 2003 (with Carli and another with Johannesen-Schmidt and van Engen) proclaimed that women's natural transformational leadership traits actually gave them an advantage over men's transactional style in modern organizations.

Based on these works by Rosener, Helgesen, and Eagly, "Think Manager, Think Female" became the rallying cry of many in hopes that women's style of leadership would not only be more accepted by the corporate world but that it would become the preferred style of leading organizations. This trend became a popular theme found in many popular books aimed at leaders of both sexes. It was believed that this direction would make women more comfortable in leadership positions because they could simply be themselves and did not need to act "like men" in order to succeed. Men reading these materials were encouraged to promote women because their innate style of leadership would work best in organizations that were much more complex than those of the past. Authors argued that flatter, team-based organizations needed leaders that had good social and networking skills. Women were perfect for these new positions.

In addition, articles in *Business Week* introduced the "Think Manager, Think Female" to an even wider audience. "As Leaders, Women Rule" highlighted new studies that found that female managers outshine their male counterparts in almost every measure (Sharp, 2000). In 2003, Conlin proclaimed that boys were becoming the second sex. Another article bluntly titled "The End of Men" (Rosin, 2010) discusses how our modern, post-industrial society is better suited to women and that an unprecedented role reversal is underway with women on the top and men on the bottom in many aspects of education and organizational life.

### **THINK MANAGER, THINK NON-SPECIFIC GENDER TERM**

As the concept of "Think Manager, Think Female" gained momentum and "Think Manager, Think Male" was still mainstream, a third cry began to be heard – something termed here as "Think Manager, Think Non-Specific Gender Term." This line of research and popular press publications called to attention the fact that there really are not significant differences between men and women – at least when it comes to personality, leadership style, and

effectiveness. Williams and Best (1990) stated that the differences among men and among women are greater than the average differences between men and women.

As early as 1976, Osborn and Vicars conducted a field study to evaluate leader behavior and subordinate satisfaction. Results showed that a leader's sex did not have a consistent influence on either leader behavior or subordinate satisfaction. According to Osborne and Vicars, the results of their study were consistent with other field studies but were in direct conflict with studies that were conducted in a laboratory environment. A meta-analysis by Dobbins and Platz (1986) looked at studies that used observers as raters of leadership characteristics and showed that no meaningful differences existed between males and females on "satisfaction with supervisor" and that leaders of both sexes exhibited characteristics associated with stereotypically male and female leadership behaviors.

In 1991, Shimanoff and Jenkins extended this line stating that:

leadership is the performance of behaviors which helps a group reach its goals. It includes behaviors like making procedural suggestions, offering sound opinions, providing relevant information, and presenting counter-arguments. Both men and women do these behaviors well and with equal frequency. (p. 517)

For example, Kolb (1999) found that attitude toward leadership and leadership experience were stronger predictors of leader emergence than was masculine gender role.

Robert Vecchio has been one of the most vocal opponents of "Think Manager, Think Female." In both a 2002 article and a 2007 book, Vecchio challenges Eagly's research claiming that her findings were "overstatements" based on non-standardized measures of leader behavior that included self-report data and that her strong claims of a masculine or feminine advantage do not have the data to support them.

The "Think Manager, Think Non-Specific Gender Term" line of research has worked its way into the popular press leadership books. In 1996, Ann Harriman in her book *Women/Men/Management* (2nd edition) states "Studies show that women managers differ very little from effective men managers in terms of their attitudes, motivation, and behavior" (p. 157). This sentiment is seconded by Wajcman (1998) when her research showed that "Women who made it into senior positions are in most respects indistinguishable from the men in equivalent positions. This finding leads me to argue that there is no such thing as a 'female' style of management" (p. 56).

Parker (2005) brings up another concern with the "female advantage" argument. She claims that this new view is problematic because is presented as a race-neutral, universal representation of all women. It is based on the socialized experiences of middle class white women and excludes the experiences and perceptions of other races and socio-economic classes." Therefore it does not accurately portray characteristics of all women.

In addition to the “Think Manager, Think Non-Specific Gender Term” another cry has arisen that challenges the value of “Think Manager, Think Female.” It is the realization that “Think Manager, Think Female” just reinforces the gender role stereotypes that many are trying to shed. Stating that women make better managers assumes that all women (and by default all men) act in the same ways. As early as 1989, Korabik and Ayman warn us against judgments based on preconceived beliefs:

Just because someone is a woman does not mean that she necessarily has good interpersonal skills or poor instrumental ones. Likewise, not all male managers have good task ability or inadequate social skills. It is crucial that we should not stereotype managers on the basis of biological sex and that we accept the diversity of values and styles among individuals. (p. 30)

Shimanoff and Jenkins (1991) remind us that we cannot assume that all men and all women lead in particular ways. We are individuals and as such are products of our individuality. Pounder and Coleman (2002) wrote that those who “contend that transformational leadership competencies are largely the domain of the female leader are as guilty of stereotyping as those who would equate effective leadership with male characteristics” (p. 127).

In addition, Robinson and Lipman-Blumen (2003) point out that by saying “Think Manager, Think Female” we are back to trying to forecast an individual’s leadership ability based on his or her gender which has not been shown by their study or previous research. They warn us to remember that “despite the assertions of previous research neither men nor women uniquely can claim leadership profiles that represent a better fit for today’s challenges” (p. 33).

Vecchio (2002) states that a gender advantage approach is a “step backward” in understanding successful leadership. In his view this perspective offers a simplistic, stereotypic view of leadership that has not demonstrably advanced this field of study. We agree that a stereotypic approach to leadership development is not good for anyone. This view (in some ways) has taken us back to the 1970s when we tried to predict management/leadership success based on which restroom an individual used.

## **GENDER ROLES IN LEADERSHIP EDUCATION**

Not surprisingly, over the years all three of these perspectives have been found in leadership education materials. What may be surprising to some is that all three of these perspectives can still be found in today’s classroom. For example, there is still at least one leadership textbook (Pierce and Newstrom, 2011) that includes the actual BSRI in it for a student to complete in order to find out his or her “sex type” score – masculine, feminine, or androgynous.

Many current educational materials and textbooks also reflect the trend of “Think Manager, Think Female” in leadership roles. A 2008 text by Dessler and Phillips suggests that although men and women may be equally effective as leaders with today’s challenges of managing diversity and leading empowered teams, women may lead better because of a more participative style of management. Another text by Messick and Kramer (2005) states that although recent research on gender in leadership indicates that while women tend to adopt different leadership styles than men, they are just as –if not more – effective on important leadership dimensions. Other texts portray the same general message that women have a leadership advantage over men (Daft, 2012; Jones & George, 2011; Nelson & Quick, 2009). So now, in these texts and popular press books, the message has become “women you’re OK – actually better than men – and men, you need to act more like women to be successful.”

Similar in number to the “Think Manager, Think Female” publications are texts that take the “Think Manager, Think Gender Non-Specific Gender Term” approach to the gender in leadership discussion. Many times, these texts acknowledge the “Think Manager, Think Female” trend but then state that a gender advantage doesn’t really exist due to many of the reasons we have addressed earlier (Yukl, 2006; Nahavandi, 2012; Gill, 2006; Hughes, Ginnett & Curphy, 2009).

Depending on the instructor and text chosen for a particular leadership course, a student may be taught any one of these theories and if he or she takes multiple courses in leadership, may be exposed to all three (inconsistent) messages. This may lead the student to ask a question such as: “In order to be a good leader, should I act like a man, a women, or just be myself because gender doesn’t matter?”

### **Why Are We so Confused about Gender Roles in Leadership Education?**

Even though research has shown the BSRI and to a lesser extent the SDI to be questionable (at best), most of the information represented in popular press books and textbooks is based on these instruments. We have to ask: Why? In order to explain our beliefs as to the causes of this continuation down a troublesome road, we use a concept that is familiar to many of us: evidence-based management.

According to Rousseau (2006), evidence-based management derives principles from research evidence and translates them into practices that solve organizational problems. However, research has shown (for a variety of reasons) that practitioners in organizations frequently do not use the findings from organizational research in the management of departments and/or organizations (Rynes, Colbert & Brown, 2002). We believe the same concept is at work in the academic world. That is, there are probably thousands of reasons that researchers, teachers, textbook authors, and publishers could give as to why research that is based on the SDI and the BSRI is still being used in leadership development and education but

we posit that it comes down to a combination of a lack of evidence-based research, a lack of evidence-based publishing, and a lack of evidence-based teaching.

### **Lack of Evidence-Based Research?**

In the push to publish and not perish, some (definitely not all) researchers do not investigate the foundations of the instruments they use in research projects. We assume that since the instrument was published in a peer-reviewed journal or because it has been used many times in previous research, it must be appropriate to use in subsequent research studies. Very rarely do we research survey instruments to see if later studies tested the validity of the instrument on other samples.

For example, much of the work done by Powell and Butterfield (1979, 1989, Powell, Butterfield & Parent, 2002) came after the first articles in the psychology literature that questioned the validity and factor structure of the BSRI. Other researchers (Turgetgen, Unsal & Erdem, 2008) continue to use the BSRI in their research on gender roles and leadership. By now, much of the research and information on gender roles and leadership is based on faulty and/or outdated instruments. This “foundation” is still serving as a basis for information that is included in textbooks and other educational materials.

### **Lack of Evidence-Based Book Publishing?**

Another reason for the continued use of questionable information in textbooks and other educational materials may be a lack of evidence-based publishing. Textbooks play an essential role in the learning process and often leadership texts include a section on gender leadership. So why are these sections based on outdated gender and leadership materials still in textbooks? A quote from author Stephen Robbins in Cameron, Ireland, Lussier, New and Robbins (2003) states:

“Publishers are in the business of selling books. They’ll sell anything if they think people might want it. They don’t care about integrity or quality” (p. 716).

Lynch and Bogen (1997) call publishers “risk averse” and indicate that they work with a standard model of a successful text and make only cosmetic adjustments in subsequent editions. Also it has been proposed that textbooks continue to include outdated sections in books because instructors expect to see them there or like to teach using these ideas or methods (Stambaugh & Trank, 2010). Instructors expect to see a section on gender and leadership in texts making them mandatory in leadership textbooks. Often these sections will tell women they need to act like men and/or men need to act more like women to be successful leaders in organizations which, as we have shown is at best a questionable direction.

### **Lack of Evidence-Based Teaching?**

In the end, it is up to the individual instructor to determine which topics are covered in his or her classroom. Many times, an instructor will teach what he or she has done in previous sections of a course. This requires very little preparation time but can also result in little or no changes in the course content for several years. We often stick with the same textbook through many editions because we will only have to make minor modifications to lectures and other course materials in order to be current with the “cosmetic adjustments” in the text. The mantra for many tenure track and tenured individuals seems to be “the less time I can spend on teaching preparation the more time I will have for my research.” This leads many of us to rely on our textbooks to keep our knowledge current on the topics we will be covering in the classroom – especially if the topic is out of main area of research.

Conversely, instructors rely on textbooks for the most current information in areas outside of their main research interests. Textbooks authors and publishers rely on research to get the best information to put in texts and other educational materials. However, the materials often presented in the gender and leadership sections are based on a foundation that was built using at least one erroneous instrument.

### **SO WHAT?**

So why should we care about reevaluating the SDI- and BSRI-based research in leadership development? We will discuss three primary reasons for caring: (a) the “mis-education” of our future leaders, (b) the business issues stemming from a lack of diversity in leadership, and (c) the effect these have on the image of business schools.

#### **“Mis-education” of our Future Leaders**

Sczesny (2003) suggests that through their early years, women have fewer leadership opportunities and this may cause them to internalize traditional gender roles. Schwartz (1989) states that “for decades, even women themselves have harbored an unspoken belief that they couldn’t make it (in the business world) because they couldn’t be just like men, and nothing else would do” (p. 75). Women also want the opportunity to be the same person (personality-wise) at work and at home (Heffernan, 2002). However, don’t men want the same thing? Shouldn’t they also be able to be themselves in the workplace instead of feeling like they need to act like women to be a good manager? Our question is this: Does all of this lead to a lack of good managers because of a self-fulfilling prophecy? Do women avoid leadership opportunities because they have been taught to “think manager, think male and they obviously aren’t men? Is the reverse true for men? So for both men and women are we telling them they can’t be good managers because they aren’t the right sex so they just don’t try? We need to educate all

students in a way that makes them feel that their sex, or gender role, is not a liability when it comes to the skills needed to be a leader.

### **Business Issues from a Lack of Diversity in Leadership Positions**

Bell, Connerley, and Cocchiara (2009) define diversity as real or perceived differences among people with regard to race, ethnicity, sex, religion, age, physical and mental ability, sexual orientation and family status). A lack of diversity in organizations has long been a topic of conversation – both in the academic literature and in the popular press.

A lack of women in leadership positions has an impact on many financial indicators including profits (Riley, 2010) and has been described as “wasting a great deal of talent” (Mintzberg, 1996, p. 66). The 2010 Catalyst study by Ernst and Young showed that although women now occupy about 40% of managerial and professional jobs, 136 (27.4%) companies on the Fortune 500 list had zero women executive officers while only 98 (19.6%) had over 25% of their executive offices filled by women. The average Fortune 500 rank of those companies with no women executive officers was 279 while those with 25% or more women executive officers did much better with an average rank of 242. In addition, the 2007 Catalyst study showed that the Return on Equity for the top 25% of Fortune 500 companies with the highest percentage of women on the Board of Directors was 53% higher than for the companies with the lowest average number of women board of directors (including those with none). The top 25% of companies also saw a 66% higher Return on Invested Capital than did those without a gender-diverse Board of Directors.

The business case for gender diversity in leadership positions is only part of the reason that we need more women in leadership positions. A more diverse workforce makes for a better overall work environment with less toxic managers and more “family friendly” policies (Heffernan, 2002; Giacalone & Thompson, 2006). Cox and Blake (1991) posit that a more diverse workforce results in lower turnover and absenteeism among women. They also propose that organizations that are more diverse appeal to women and solve problems more creatively. In addition, Kumar, Lamb and Wokutch (2002) suggest that it is financially prudent for organizations to take societal expectations into account and that society now expects a gender diverse workforce in all organizations.

However, a word of caution needs to be stated at this point. Diversity issues should not be limited to a lack of women at the top of organizations. Although men currently occupy a majority of upper level positions in organizations, with articles such as “The End of Men” (Rosin, 2010) and “The New Gender Gap: From kindergarten to grad school, boys are becoming the second sex” (Conlin, 2003) suggest a need for at least a little attention be given to the role reversal emerging in corporations. Diversity should represent a true mix of genders, races, and ethnicities. Making sure the pendulum does not swing too far in any direction is a challenge.

So how does leadership development in colleges and universities affect the gender diversity in the upper levels of organizations? Most organizational behavior textbooks continue to be written by white men, and while most texts present strong messages about diversity, some still encourage women to rely on ingratiation to be influential (McShane & Von Glinow, 2008; Parham & Muller, 2008). We agree with Bell et al. (2009) and their statements: “In a real sense, colleges of business are suppliers to corporations.... we must ensure that we are preparing students to meet the expectations of the firms in which they will be employed” (p. 600).

In many instances we are still teaching a gendered leadership philosophy and which may lead students to believe they cannot be successful because they are not men (or women) and do not want to be someone different at work from who they are at home. This may cause young people not to try to become managers at all, resulting in wasted male and female talent.

### **Bad for Business School Business**

The MBA and management education are “big business” for most colleges and universities. As discussed previously, some believe the “feminine” skills of communication and employee relations are especially important in today’s flatter organizations which rely more on teamwork and horizontal relationships to get work done. However, many of the skills needed to operate in these environments are minimized or ignored in management and MBA curricula (Simpson, 2006; Heilman, 2001). As a result, management curriculum has been accused of providing an education that has only a small relationship to what is important for succeeding in business and may have very little worthwhile advantage to students (Pfeffer & Fong, 2002). A perception exists that we are not providing an education that allows our students to attain the knowledge and management skills they need to be successful leaders in the modern business world. This situation will ultimately lead many students and parents to question the value of an education in management and result in a decline in enrollment in turn leading to lower operating resources for schools.

### **FUTURE DIRECTIONS**

Noting that the much of the gender roles literature is grounded in outdated stereotypes of college students it should not be used to explore gender differences in management or leadership. There are other avenues of research that have yielded promising results. These should be pursued so that leadership teachers and developers have a stronger research base to present to students.

## **Social and Emotional Intelligences**

An area of research that is providing useful insight into leadership is the related areas of social and emotional intelligences (Rahim & Psenicka, 2005). The emotional intelligence dimensions of empathy, emotion self-awareness and regulation would have overlap with BSRI rated items on both the masculinity and femininity terms. Many leadership researchers already recognize the huge potential for understanding leadership presented by the social intelligence concept (Cote, Lopes, Salovey, & Miners, 2010), this potential could be extended to the area of leader emergence, and leader stereotypes. Early research in the related area of self-monitoring on leaders emergence was promising (Dobbins, Long, Dedrick, & Clemons, 1990; Zaccaro, Foti & Kenny 1991), showing the potential in this line of research.

## **Personality**

Research on the Big Five personality dimensions and leadership emergence has shown promise, with the dimensions of conscientiousness and extraversion as the strongest predictors of leadership emergence (Judge, Ilies, Bono, & Gerhardt, 2002). Additionally, openness to experience and extraversion were also predictors of the potential effectiveness of a person in a leadership role. Given the development of the Big Five its use in research rather than outdated stereotype measures would shed researchers of many biases and problems.

## **Thinking Styles**

Stokes research (1987) suggested that many gender differences in research could be explained by differences in the thinking-feeling dimensions of the Myers-Briggs Type Indicator (MBTI). Murray and Johnson (2001) found gender differences in a military setting for MBTI, but also noted a stereotypical expectation that the military has for thinking leaders, over feelers, perhaps resulting in self-selection, or socially desirable responses. Sorting out the stereotypes from reality may prove problematic, but could also lead to more useful and valid results for leadership emergence and effectiveness.

## **Development of a New Measure**

While there are many reasons to not use outdated gender stereotype measures in current research the most easily understood relates to their original purpose. For example, the BSRI was developed as an indicator of stereotypical attitudes toward gender roles, in 1977, and revised in 1981. The roles of men and women in society have changed. A new measure, developed appropriately, that captured current stereotypes might yield research results that could help researchers understand what is really happening in modern organizations. Any new measure of

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the stereotypical view of gender roles should come with warning that it reflects a snapshot view of a culture at a particular point in time to lessen the risk of inappropriate uses

### **Self-Efficacy**

A final construct that already has empirical support for its relationship to leadership, and leadership emergence is self-efficacy (Spiller, 2004). A person's sense of capability about their leadership potential may have more impact on their selection, and acceptance of a leadership position than gender, or gender roles. Additionally Hoyt (2005) found support that leadership efficacy shielded women from the more negative feminine leadership stereotype, a finding replicated and expanded on by Hoyt and Blascovich (2007).

## **CONCLUSION**

In this paper, we have reviewed the development of study of gender roles in leadership and its impact on the current education of university students in leadership courses. Much of the materials in these sections of today's textbooks are based on the Schein Descriptive Index (SDI) and/or the Bem Sex Role Inventory (BSRI) – two instruments from the 1970s which research has not shown to be a valid predictor for leadership research. We believe that educators need to be cautious in their use and discussion of gender and leadership in classrooms until a time when there is a new valid instrument to measure these constructs and one main message from the research in this area. Until that time, leadership educators are encouraged to use other areas such as social intelligence, personality, thinking styles, and self-efficacy to help students become better leaders in today's organizations.

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# LEARNING THROUGH NARRATIVES: THE IMPACT OF DIGITAL STORYTELLING ON INTERGENERATIONAL RELATIONSHIPS

Kim Flottemesch, Concordia University-St. Paul

## ABSTRACT

*Narrative theory and narrative performance theory is often used as a theoretical framework for exploring and understanding how intergenerational storytelling builds relationships within a family unit. Multimedia digital storytelling (DST) is increasingly used as a means to capture and reproduce community and family stories while engaging students through various learning styles and modalities. However, the story is frequently only a small part of the total learning from this process. The totality of learning, or the “narrative of knowing” (McAdams, 2006), is created through a participatory exchange between narrator and listener. The narrative of knowing encompasses technical and storytelling skill transfer between participants during the process and building relationship between participants. By discussing DST projects from an undergraduate Family Communication course, this article highlights the process of relationship building and the pedagogical concerns of training students to carry out research using the narrative approach in conjunction with DST in an intergenerational context. The author discusses students’ projects and how intergenerational relationships were strengthened through the use of DST.*

## INTRODUCTION

Scholars have studied the impact storytelling has on community involvement (Davis, 2011), family connectedness for young children (Aarsand, 2007), cultural awareness (Lambert, 2006) and the role narrative plays in the construction of our self-identity (Hull & Katz, 2006). Educational perspectives involve the pedagogical elements involved in the teaching and learning process and how digital storytelling (DST) may be used to promote learning (Porter, 2012; Roby, 2010). To further understand the impact digital storytelling has on college student’s perspectives of family and the relationships in the family unit, the following research questions were proposed:

*RQ1: How does the process of digital storytelling impact family interaction?*

*RQ2: What are undergraduate student’s perceptions of the digital storytelling process?*

## **Background of Digital Storytelling**

Digital storytelling (DST) is a multimodal approach that brings the ancient art of telling stories to life using technology. While the art of oral history has been around for thousands of years, the incorporation of multimedia has added another layer of understanding to the narrative voice. The ability to personalize stories with pictures, personal narration, video, animation, artifacts and music, supports a deeper level of understanding and meaning of the story for the listener and audience. At its core, the DST process of creating narrative is completed to create or support community building (Fields, 2008).

The original motivation for DST providing a voice for community groups came from the early 1990s at the University of California at Berkeley's Center for Digital Storytelling (Lambert, 2007). Since then, a stream of work has developed in community-based DST around intergenerational storytelling environments where student researchers work with older storytellers (Davis, 2011). In many contexts, these efforts of intergenerational storytelling center on the mediated construction of identity and community and articulation for collective history within those communities (Allan, 2004). DST emphasizes a participatory nature in the process of emerging stories, which builds the relationship between the storyteller and listener. The outcomes of DST can create new opportunities for dialogue by mediating the different communicative practices among intergenerational participants. According to Burgess (2006), this mediation of vernacular creativity, "is a productive articulation of consumer practices and knowledge (of, say, television genre codes) with older popular traditions and communicative practices (storytelling, family photography, scrapbooking, collecting)" (p. 207). The relationship that is built may be a critical piece to the success or failure of the specific DST project, but it has implications for the personal relationship between the participants. The process of DST, start to finish, can stimulate discussions and dialogues that go beyond the subject. The transmission of values from the elders to the younger generations is invaluable and is an excellent tool for intergenerational connection (Lambert, 2006).

## **Pedagogical Significance**

Pedagogically, the process of DST is an opportunity for students to apply knowledge about a topic and be engaged in their own learning. It provides meaning to learning through the use of a variety of learning styles, such as auditory, visual and kinesthetic skills. Narrative as a pedagogical strategy is seen as an authentic, digital-age approach for diverse learners (Rose, Meyer, & Hitchcock, 2005) since storytelling allows students to access their analytic and creative capabilities while demonstrating understanding (Pfahl & Wiessner, 2009; Speaker, Taylor, & Kamen, 2004). Hands-on application of course content through the DST process requires students to use higher order thinking skills in their creativity of how the narratives will be articulated and presented (tech4learning, 2007). In addition, narratives support learning

through increased literacy skills (Speaker et al., 2004), and improved listening, recall, and sequencing skills (Reed, 1987).

More importantly, writing a personal narrative for a DST project provides students with additional techniques for making deeper connections with subject matter content (Roby, 2010). Designing and communicating information in a DST format requires students to deepen their understanding of the content, the relationship between storyteller and interviewer, and in their own identity. The DST process provides students with material from which identity and meaning are crafted and connections are made (Wiessner, 2005).

## **THEORETICAL FRAMEWORK**

The theoretical framework that provides the grounding for this study, centers on the ideas embedded in the Narrative Paradigm. “When it comes to human lives, storytelling is sensemaking” (McAdams, 2006, p.76). People experience the world as a set of stories. These stories help one to make sense of their world through interpretation of the story. Stories give meaning to personal experiences, they function to teach family values and beliefs, construct and reaffirm one’s identity, and provide connections among generations (Koenig & Trees, 2006).

As one chooses stories to share, they create and re-create their lives (Fisher, 1987). As a narrator, one engages in self-discovery and self-creation. Bruner (1994) discussed “turning points”, moments when people report sharp change in their lives and this is accompanied with dramatic changes in their representations of self. These instances of narrative construction function help the narrator clarify his or her self-concept and symbolizes how one thinks of their life as a whole (Hull & Katz, 2006). These turning points can also construct and reaffirm family identity and one’s place in the family unit.

It is these narrative identities that influence one’s performance. Narrative performance is a fluid process for the family unit. Families make sense of events and their meanings as they remember stories and listener’s reinterpret or emphasize the meaning. Eventually both teller and listener develop what McAdams (2006) calls the narrative of knowing, what is learned by all parties from the stories.

## **METHODOLOGY**

### **Setting/Project Description**

Participants in the study were undergraduate students at a private, 4-year university located in a large urban area in the Midwest. Participants were from a variety of cultures and ethnicities. Undergraduates in the field of Communication Studies partaking in a Family Communication course were instructed on the topic of Narrative Theory and the fundamental principles supporting the Narrative Paradigm. Students learned the functions of stories and

specific performance roles in terms of rules and patterns an interviewer may look for when interpreting the narrative voice. Extensive coursework focused on elements related to intergenerational communication and issues that may arise when trying to bridge the generational gap.

To assist in synthesizing course content related to narrative and intergenerational communication, students were assigned a course project where they were to interview a family or community member from a different generation. The purpose of the interview was to “recount” the narratives related to personal and family history- a retelling of memories of what was experienced (Fisher, 1987). Face to face, personal interviews were electronically recorded through audio and/or video technology and then archived into a DST multimodal format. These formats included voice-overs of narratives, video recordings of interview footage, photographs and other artifacts, and music. Students were given flexibility with regard to which multimedia program to use and the overall formatting of the DST product. A majority of students used the programs of iMovie, Garageband, and Windows Movie Maker. DST narratives were to be seven to ten minutes in length, though a vast majority of final products far exceeded these parameters and averaged 15-30 minutes in length.

### **Data Collection & Analysis**

Upon completion, students shared the final DST product with the interviewee and other family members in a private viewing. Participants reflected on the project, its process, and outcomes by responding to open-ended questions in a self-reflective narrative report. Self-reflection essays were analyzed by identifying emerging themes and patterns. Data was then sorted into coding categories and analyzed.

## **RESULTS AND DISCUSSION**

Upon analysis, three themes emerged from the data collected through student self-reflection essays. The themes were: Intergenerational Connection, Transmission of Family Values, and Process of Narrative of Knowing.

### **Intergenerational Connection**

No matter what degree of relationship the interviewee and interviewer had prior to the project, all participants reported a deeper level of connection with the interviewee. Often this connection was expressed through a level of newfound respect for the narrator. It was through listening to the narrative stories that the interviewee gained an understanding of the journey the interviewee has experienced.

*“This project helped me get to know not only who my grandfather is today, but how he got to where he is. The events in his life and the struggles he has faced, has made me even more proud to be his granddaughter.”*

*“I found that I have different areas of respect for my mom that I did not have before.”*

*“I am so proud of what my dad has accomplished in his career. He has made a significant difference in someone’s life and they still thank him to this day- he is a hero to them and now to me”*

*“I have more respect for my great-grandma that I never had before. Now knowing what she has experienced, I learned that she is a really strong and loving person.”*

*“It reaffirmed all my respect for my mom. I definitely feel more connected to her.”*

At times, these connections opened emotional doors that were previously closed. The process of listening to narrative and the sharing of the DST helps bridge emotional distance that can occur through family tragedy or personality differences.

*“Since my uncle died, our family has been struggling with his death. After watching the video as a whole family, we seem to have a better connection among us. We realized it is better to honor his memory by remaining connected as a family.”*

*“The relationship with my grandma has grown and blossomed into something wonderful. Previously I always felt she was apprehensive about being able to relate to her grandchildren and now I feel like we have a special relationship that I will forever cherish...throughout the whole thing, I gained a new found respect and love for her.”*

*“In general we aren’t that close but he started talking about how he related to me and what he hopes for my future. That was pretty deep.”*

## Transmission of family values

Koenig, et al. (2006) indicate that one function to family stories is to teach expected behavior and deeply held values to current members and to socialize new members to these behaviors and values- developing a family culture if you will. Such stories contain moral lessons or practical lessons but there is an instructive intent to link family values to familial themes. It is these themes of work ethic, survival and adaptability, positive life perspective, duty to care for others or give back to the community, and the importance of independence that are related in the following student reflections.

*“I loved the story where he told me about how his mother would turn chores into fun. Ironing shirts and cleaning the house were turned into games to be played. I never realized it before, but I see how this approach on working has shaped even my outlook on life. His daughter, my mother, always looked to the bright side of things- and I do too.”*

*“I notice my mom’s sense of humor evolving to be more and more like my grandpa’s- and I see it a lot in myself and my siblings! My family really loves to laugh even at the most ridiculous of circumstances!”*

*“What struck a chord for me in the interview process was hearing about all the mission work that my mom has done and why she did it. Also that it has run in the family because my grandparents did it when they were in their 60’s right before they passed away. It is good to hear and see what my family has done in the past for those less fortunate.”*

*“My great grandma sounds a lot like myself. I think of her sense of calm and patience. My mom has this too and I loved when she discussed leaving her home town by herself and making her way in life to get her dream job and not depending on a man. She really inspires me to go out and be independent.”*

Finding the lesson learned from the story significantly impact both author and listener. Family stories remind people about who they are, where they come from, and the values disseminated along the way. Stories create bridges connecting generations and create a sense of history that gives younger family members a sense of identity. It is through this collective voice that family identification occurs.

## Process of Narrative of Knowing

The concept of narrative of knowing, or what it is you learned from the stories (McAdams, 2006) does not only occur from listening to the narrative, nor the process of interaction between the interviewer and interviewee. Lambert (2006) describes the process of organizing, scripting, capturing audio/visual, and editing can stimulate discussions and dialogues that go way beyond the subject and issues that make it into the final product.

*“He enjoyed being part of the editing process too! I learned so much about who he is, his patience, his work ethic, his perfectionism (and mine too) by editing the project together.”*

*“The stories being told were just mesmerizing. I kept crying while editing and re-watching the video. It was so touching and it made me really proud to be Hmong.”*

*“Even though I always respected my elders, it was through the process of translating their native tongue to English that I grew to appreciate and understand their journey. I now feel such gratitude towards them.”*

Lambert (2006) observed that the editing process in itself is a powerful reflective tool that helps the participants to actually manage their meaning. The production process becomes “regenerative in itself” (106). When this process is shared among participants it can enhance the connections that were made throughout the narrative storytelling sessions and bridge the notion of a digital divide (Aarsand, 2007) among generations while increasing participant’s technical literacy (Davis, 2011).

## CONCLUSION

DST has been used a pedagogical tool to enhance student learning outcomes by providing students with an opportunity to be engaged in their own learning. The collection of narratives and using multimodal media to tell one’s story, not only promotes deeper connections to the subject matter (Roby, 2010) but between the narrator and the listener. The technical process of creation and development of the DST have just as much impact on the personal relationships that are formed as they do on the pedagogical lessons learned. DST can be used as a tool to engage and enhance family dialogue, nurture family values and belief systems, and promote mutual appreciation and respect for members of the family unit. Lessons gleaned from the DST process go beyond the classroom environment and translate to personal and meaningful intergenerational relationships.

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# **CAREER CONCERNS OF CHINESE BUSINESS STUDENTS IN THE UNITED STATES: A QUALITATIVE STUDY**

**Xin Liu, University of San Diego**

## **ABSTRACT**

*This paper aims to explore factors that impact the career concerns of Chinese business students in American higher education. To gain an in-depth understanding of this issue, a series of interviews were conducted to explore the career concerns and needs of the participants who plan to return to China or remain in the U.S. after their graduation. The results indicate considerable consensus that social relationship has a significant impact on the job search of the participants who plan to return home. On the other hand, the participants who plan to stay in the U.S. are more concerned with cultural barriers. The results further indicate that career certainty and personal growth are also major concerns of the participants. An understanding of such factors may better enable Chinese employers and multinational companies to improve their recruiting and training programs to Chinese overseas students, as well as help career counselors to provide effective career services to Chinese overseas students.*

## **INTRODUCTION**

According to the Ministry of Education of P. R. China, a total number of 284,700 Chinese students studied abroad in 2010, and there was a continuous growth in this number compared with the statistics in previous years (Mu, 2011). An increasing number of Chinese students are choosing to study abroad. China is becoming the largest source of international students for the higher education in the U.S. (Fei, 2011).

Prior research (e.g., Mu, 2011) has reported that Chinese overseas students generally face a great number of challenges such as difficulties assimilating when remaining in the U.S., trouble readjusting to life in their home country when returning home, or dissatisfaction with their salary. No research, however, has specifically investigated the career concerns of Chinese overseas students in business programs, even though it is a growing population in the higher education of the U.S. (Choudaha & Chang, 2012).

The aim of this study is to enhance insights into the job concerns of Chinese business students in American higher education using a qualitative approach. This study takes an exploratory perspective and investigates the career concerns and needs of Chinese business students who plan to return home or stay in the U.S. after completing their education. To find the

answers to the research questions, open-ended interviews were conducted with 10 Chinese students in the business school of a large public university.

Such research is important as it can help Chinese employers and multinational companies to develop appropriate recruitment policies and training programs for Chinese overseas students. Because China has long suffered from losing its overseas talents (e.g., Nawab & Shafi, 2011), it is necessary to explore factors that might impact the career concerns of Chinese overseas students. A greater understanding of such factors might better enable Chinese employers and multinational companies to provide these overseas students with better working opportunities.

A study of career concerns of Chinese business students in the U.S. is also needed because career development programs have seemingly failed to meet the requirements of Chinese overseas students (e.g., Dietz, Orr, & Xing, 2008). More research may help improve the quality of career development training provided to Chinese overseas talents.

Finally, this study can assist educators and career counselors in designing adequate career services to Chinese business students with their job search (e.g., Crockett & Hays, 2011). With the rapid growth of Chinese students in business programs of American higher education, educators and career counselors of American universities and colleges are facing increasing challenges in responding effectively to Chinese business students. Such research may generate significant insights with respect to the career services of international students. It is important for universities to know whether it is necessary to provide separate career services for students with different cultural backgrounds.

The next section reviews prior literature. The third section explains how interview data were collected and analyzed. The results are then reported and discussed in the fourth section. The final section provides a summary and discusses potential implications.

## LITERATURE REVIEW

Chinese overseas students pursue their own degree with extraordinary costs as most of Chinese students studying abroad are privately funded (e.g., Chen, 2011). As such, Chinese overseas students become increasingly cautious in their job search. The career concerns of Chinese business students studying abroad may be influenced and shaped by many different factors. In order to make sense of Chinese business students' career concerns, it is necessary to identify the factors that have an impact on their job search.

A few studies (e.g., Musumba, Jin, & Mjelde, 2011; Reynolds & Constantine, 2007; Shen & Herr, 2004) have specifically examined the factors that have an impact on the job search of international students, and have suggested that the certainty of career, major choice, and environmental factors (e.g., family, school counselors, teacher, friends, and government) may be important to the career concerns of Chinese business students. For example, Singaravelu, White, & Bringaze (2005) found that Asian international students' job decisions were largely impacted by career certainty, the formal guidance system of the school, and the opinions of their friends.

Katz, Juni, Shope, & Tang (1993) suggest that the most important factor for the job concern of international students is their countries' cultural background that reflects strongly its social values. For example, in a cross-cultural study, Song and Werbel (2007) found that social networks have large effects on job search. Specifically, social networks (i.e., *guanxi* in Chinese) decreased Chinese students' job search confidence and job satisfaction. This finding suggests that social networks have a negative effect on the job choice of Chinese students. Prior research (e.g., Yi, Lin, & Kishimoto, 2003) further suggests that Chinese students may have difficulties in overcoming cultural barriers when they choose to remain in the foreign country after graduation. To meet the needs of Chinese business students, employers and career counselors need to understand these two factors.

This study thus investigates the impact of these factors examined in prior literature on the job search of Chinese business students who decide to return to China versus those students that remain in the U.S., after completing their education. Based on the above discussion, this study proposes the following research questions:

1. What are the factors influencing the job search of Chinese business students returning home or remaining in the U.S.?
2. What are the implications of career development training for Chinese employers and multinational companies?
3. What are the implications of placement services for career counselors in higher education?

## **RESEARCH METHODOLOGY**

In order to shed light on the research questions, one-hour face-to-face interviews were conducted with 10 Chinese student volunteers. The participants in this study were senior year business students at a large public University. There were 5 male students as well as 5 female students, and 3 participants were graduate students. These students studied different majors such as accounting, international business, Master of Business Administration (MBA), finance, and marketing. Also, these students were from different areas in China. 3 students were from Hong Kong, 2 from Macao, and the rest from China Mainland. The participants are identified with fictitious names.

The open-ended questions asked in the interview were developed primarily based on the findings of prior studies (e.g., Shen & Herr, 2004) and adapted to the research questions of this study. The questions asked in the interview were based on the broader education research literature concerning factors that might have an impact on the job search of international students (e.g., Singaravelu et al., 2005; Song & Werbel, 2007; Yi et al., 2003).

The interviews were carried out in the author's office. Each interview lasted in 45 to 60 minutes. All interviews were tape-recorded and conducted with informed consent. The Institutional Review Board of the author's institution approved this study. The interviews were

later transcribed and coded by the author. All of the participants exhibited great openness in discussing their experiences.

<b>#</b>	<b>Name (pseudonym)</b>	<b>Gender</b>	<b>Field of Study</b>
P1	Yao	Female	Accounting
P2	Xiao	Female	International Business
P3	Lan	Female	MBA
P4	Wei	Female	Accounting
P5	Peng	Male	International Business
P6	Jia	Male	Finance
P7	Ming	Male	Marketing
P8	Hui	Male	Finance
P9	Feng	Male	Marketing
P10	Qian	Female	Accounting

## RESULTS

Following Creswell (2007), this paper conducted a content analysis on the open-ended interview responses. The result was a set of transcripts with very rich content. The themes that emerged were identified after transcription and these themes fell into a variety of categories. If the themes were affirmative, the sub-themes were explored further. The following section discusses the key factors that affect the job decisions of Chinese business students.

### Students planning to stay in the U.S. for work

Consistent with Song and Werbel (2007), the most frequently mentioned issue during the interview by the participants was social networking (i.e., *guanxi* in Chinese) when they were asked about the major challenges if they return home for job. For instance, Wei stated:

*[In China,] a lot of things are based on how good you are with your friends, with your boss, with your colleague, so I think making a good relationship is more crucial in China than in the US.*

Wei was very concerned with complicated interpersonal relationships embed in Chinese culture that would impede her if she does not deal with them properly. Hence, she decided to find a job in the U.S. In China, *guanxi* is of vital importance in seeking a job. Some participants indicated that one could easily get a job as long as he/she is familiar with someone in a top management position, whereas others might not be able to get a job offer no matter how qualified they are. How to survive under such an intricate networking is a huge challenge to

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those overseas students who have to deal with it when they return home for work. Ming described this issue in the following way:

*When you are looking for a job, there is a front door and a back door. The front door is you just apply, and they will look at your application. The back door, they just allow people [who they know to] work in the company without looking at [other] applications.*

Returning to their home country is difficult for the students who are no longer familiar with the manners in which Chinese local people communicate with each other (e.g., Brabant, Palmer, & Gramling, 1990; Pedersen, 1991). The participants have consistently expressed concerns regarding the disconnection of their home culture and the difficulties of fitting back into existing family, educational, or employment roles. These students have struggled to cope with the loss of friends, as well as deal with complicated relationships in their home country (e.g., Butcher, 2002). Overseas experience may be to their advantage, but also can be disadvantageous when they establish relationships. Some of students even feel pressure when communicating with their family or friends. Feng began studying abroad when he was sixteen, and sometimes he felt uncomfortable with this complicated interaction. In the interview he said:

*But in china, the relationship between people is really complicated to me, really, because you have your family. Sometimes, even though you think it is not right, you cannot say. And with your friend, sometimes you have to consider their feelings; I just cannot speak very straightforward. You have to think about everything before you say or do it. Maybe I just have been away from china for too long. Sometimes, it is just too hard to really know people around you, really know what they are thinking about.*

Just like what Feng said, establishing relationships in China is quite complicated. What he has learned abroad to develop a good relationship in the U.S. is not applicable to the situation in China. Not only is it hard to build good relationships with one's family and friends, it is also very difficult to build good relationships in business. The business style varies greatly from country to country. Accordingly, the way to establish a good business relationship also varies greatly. Peng who is from Hong Kong compared business styles in Hong Kong and the U.S., and he concluded:

*Hong Kong-style business [is] before we talk about business, we will sit down, eat, and drink [to] have a good relationship. And then after that, we will talk about business. It's different from US style because, in the US, people talk about business at the first step. [In Hong Kong,] we have to know you [first]. We know each other, and then we start to talk about business. And the relationship has a lot [values] in Hong Kong because if you want to switch the job, you'd better have a good relationship with someone; then you can easily get a job and get help.*

Peng would like to return to Hong Kong for a job after graduation. In addition to his courses, he wants to take some classes to improve his communication skills. He mentioned that there were a lot of communication classes for employees in Hong Kong, and hoped that these classes could help him understand the working environment and communicate with others more efficiently.

Clearly, the participants felt that school has not equipped them with the appropriate communication skills. The point was made that a university education in the U.S. does not provide appropriate skills and knowledge for these students to be able to deal with the interpersonal communications that they will later face in their jobs when they return to China. Lan told me about her experience. She would like to find a job in China, but she believed that she would have to learn more interpersonal skills in addition to knowledge learned abroad. With regard to this concern she said:

*I don't think I can easily get used to working environment because Chinese people when they are working together, they are more concentrating on the relationship rather than the ability that you actually have. So I think the interpersonal relationship is the biggest skill I have to learn. I have to learn because I spent too many years overseas, and I don't really know what is going on.*

In summary, the main challenge is that students' overseas experiences separate them from the current economic and social environment of China. As it is easier and faster to adapt to a working environment that they already know well, students feel better prepared to stay abroad rather than return home to face a different working environment. Otherwise, they would have to re-acquaint themselves with the complicated Chinese working environment.

### **Students planning to return home for work**

In these conversations, the participants highlighted the rapid economic development in China, and the majority of the students showed a strong disposition to work in China. The participants indicated that the high-speed rising economy was one of the main attractions to them and that the major challenges for staying in the U.S. included cultural barriers, homesickness, and social adjustment (e.g., Yi et al., 2003).

Chinese people always put family above their individual and personal needs. All of the participants mentioned that, to some degree, they would be far away from family if they choose to work abroad. In addition to a concern about family, the participants also pointed out that belongingness was a very critical issue when deciding where to work. Belongingness includes not only a desire for family, but also greater satisfaction in work. A lack of belongingness may be because of cultural barriers. For instance, Xiao elaborated this concern as follows:

*I am kind of person that really care about the culture, belongingness, like I want to feel that I am belonging to a group of people. Even I spent many years abroad; I still feel that I am a foreigner. I*

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*don't really like their way of thinking, their principles in their values. I am still sharing the sense of values, as any other Chinese who grow up in China, never go abroad. So yes I want to go back to China.*

Xiao's comment reflects her need of social adjustment. In spite of exposure to western culture, there could be a concern that one will not be able to compete for job opportunities. Feng further explained this concern in the interview:

*For the personal life, I mean I have friends, a lot of American friends, but if you say really close friends, they are all Chinese because the co-value you believe in. The inside part is really Chinese, so it is hard to change. I think it won't change. Yes, that's my feeling. Even though sometimes you are really superior in your area, you are professional, but outside you may lack knowledge. That may become the obstacle for you to become a part of the team, sometimes in this way.*

As Feng left his home at sixteen, he has been studying abroad for more than five years. He still feels it is hard to understand western culture or work styles deeply.

### **Career certainty and personal growth**

Other major issues addressed by the participants were the living and working environments (e.g., job security and certainty), as well as opportunities for personal growth (e.g., promotion and salary) (e.g., Shen & Herr, 2004). Consistent with Singaravelu et al. (2005), Chinese students stated a greater preference towards career certainty. Job reliability is what the students strongly consider when seeking their future employer. For example, when describing what kind of companies for which the participants would like to work, Qian stated:

*I hope the firm can have pretty reliable business, so they would stay in a market for a while and also maybe [have] the success ability in the world.*

In addition, most of the participants chose to work in a big company. In their mind, working in a big company can ensure a better future for them. For example, Jia indicated:

*I want to work in a big company. I will try to work in a big company. But if unfortunately I cannot, then I will try medium company and [then] small company, because if I work in a big company, I have a better future. My future is kind of important.*

Interestingly, salary is not the most important issue when Chinese students make their job decision. They pay more attention to their personal growth in the job. For example, Hui stated a preference towards the potential for personal growth when he was asked to rank the most important factors in his job search:

*First thing is the really big potential for your growth, like the personal growth and company growth. I don't mind if I work for a small company, but they have really great promotion to you. I don't really value the salary from the beginning stage because you change it in the future a lot.*

Yao described more specifically the company that she would like to work and indicated a strong preference for the potential personal growth:

*I would say how much they care about their employee would be the first. The second one is how much for me to grow; they need have training. I know everyone has training, but how well, how they plan their coaching. I would focus on those, like personal growth, I would definitely want to have someone to supervise me, guide me, and coach me.*

The participants appear strongly concerned about the feeling of uncertainty that they might face in the future. The participants' feelings of uncertainty are primarily from their considerations of many issues such as political and economical environment. Further, the concern of career certainty also overlaps with the concern of personal development. It must be acknowledged that the training plans for new employees in China are still lagging behind, and thus lead to a feeling of uncertainty in one's job position.

## DISCUSSION

### Conclusion

Some insights have been provided in this paper into how Chinese overseas students in business programs of American higher education perceive their job search. It has been found that, while these students exhibit higher motivation to return home for work, the intricate and complicated interpersonal relationships seem to be a primary obstacle. Most noteworthy, the participants' emphasis on social relationships revealed the importance of interpersonal "guanxi" that has been influencing Chinese society the last few decades. After staying abroad for an extended period of time, dealing with relationships in China is really a new lesson for these Chinese overseas talents.

On the other hand, the participants' job concerns for staying in the U.S. were mostly influenced by the cultural barriers of Western working style as well as disconnections from their family. Surprisingly, salary is no longer the uppermost concern for a job. Instead, Chinese students care mostly about their career certainty and personal growth. They pay more attention to the reliability of job, and they make job decisions by balancing the advantages and disadvantages of a job.

## **Implications**

This paper has contributed to both educators and professionals. With the rapid economic development, business in China is becoming increasingly prosperous. Chinese enterprises are eager to recruit overseas talents. Mass media has reported that the Chinese enterprises are trying to recruit a high proportion of overseas students from business programs (e.g., Zweig, 2006). Multinational companies also have a strong desire to find graduates who not only have the skills they require but also have overseas experiences.

According to a recent study (Jeffries, 2011, p. 470), about 70% of Chinese overseas students do not return home for work. The severe brain drain in China has been discussed frequently in news and publication. The pursuit of Chinese overseas talents can present many challenges for Chinese employers and multinational companies. It is thus important for these companies and employers to understand the career concerns of Chinese overseas students.

The results of this study suggest that employers and companies may need to be proactive in the delivery of their enterprise cultures to students, offer culturally relevant services, and provide training programs that address their unique vocational needs. For example, PricewaterhouseCoopers (PWC) has started an internal training and transferring system, whereby it recruits Chinese overseas graduates, trains them for two or three years, and sends them back to China. Some participants indicated in the interview that they were fond of this system and were willing to return home after gaining working experiences abroad. As for multinational companies, transferring overseas talents may be a fast and effective way to build up their manpower (e.g., Filou, 2006).

This study further provides some insights with respect to improving career counseling services to international students. A body of literature suggested that Chinese students experience psychological stresses and social adjustment difficulties (e.g., Arthur & Hiebert, 1996; Chen, 2004; Popadiuk & Arthur, 2004). Specifically, students could have transition concerns that cause a sense of loss and anxieties after leaving their host country (e.g., Arthur, 2008). For counselors to provide Chinese students with effective and efficient assistance, the counselors should have a thorough understanding of the individual's job concerns. The results of this study may provide important information for educators and career counselors in helping Chinese students with their job search.

Finally, this paper responds to a call for more qualitative research in this area to identify factors that may have an impact on students' job search (e.g., Patton & McIlveen, 2009).

## **Limitations**

It is recognized that there are some limitations in this study. The qualitative method used in this study may be subject to the low generalizability, an issue inherent in all such studies. However, this study takes an exploratory perspective and aims to understand individuals' actions

rather than predict their behaviors. Thus, a qualitative approach seems appropriate in terms of the research objective (McCracken, 1988). This study was also limited by the small sample of students interviewed. McCracken (1988) suggests that a small but diverse sample (e.g., eight in-depth interviews) is sufficient for qualitative studies.

This study is only a preliminary exploration. Further research is needed to provide more detailed insights into the common themes from the recurrence of similar statements in the interviews. Further examination of the challenge to resolve cultural barriers that are faced by international students would provide additional insight into the most effective means of overcoming these barriers.

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# WEB 2.0 IMPLEMENTATION: AN ANALYSIS OF AACSB ACCREDITED SCHOOLS OF BUSINESS FROM AN INTERNATIONAL PERSPECTIVE

Carl J. Case, St. Bonaventure University  
Darwin L. King, St. Bonaventure University

## ABSTRACT

*Previous studies have demonstrated that electronic social networking is becoming an important aspect of the business and social world. One important question is whether institutions of higher learning have decided to implement these technologies and potentially benefit from their use. As a result, this study was conducted to examine Web 2.0 implementation at AACSB accredited schools of business, in particular, from an international geographic perspective. Results suggest that geographic area is likely a factor with respect to the decision to implement Web 2.0 technologies at AACSB accredited schools of business. When comparing continental regions, there were differences with respect to both the types of technologies and quantity of technologies implemented. In the west, for example, as many as 50% of the schools in a given area implemented a technology such as Facebook, but in the east, the largest implementation of any of the seven technologies was 13.5%. Researchers also found that institutional control may be a factor. Findings imply that because most institutions have not implemented Web 2.0 technologies, there may still be market opportunities for schools of business. As schools examine whether to utilize these Internet technologies, this research will assist in their decision making process.*

## INTRODUCTION

Social media is increasingly being woven into the fabric of 21st century culture. It has even been named as one of the top 10 Chief Information Officer (CIO) priorities and issues for 2012 (van der Meulen, 2012). A major issue is how aggressively CIOs and their teams are making the social tools indispensable.

Social media is commonly known as the Web 2.0, applications and technologies that allow users to create, edit, and distribute content (Laudon & Traver, 2012). This includes web-based communities, social networking sites, video-sharing sites, blogs, wikis, and so on (wikipedia, 2012).

This media takes the form of several technologies. These include Facebook, Twitter, LinkedIn, YouTube, blogging, and Weibo. For example, in July 2012 alone, complete.com

estimated that there were more than 160 million unique site visits to Facebook (Complete.com/facebook, 2012).

Twitter is based in San Francisco but is used by individuals in nearly every country in the world. Twitter is available in English, French, German, Italian, Japanese, and Spanish (Twitter, 2012). In May, 2011, Twitter.com surpassed 200 million tweets per day (Schonfeld, 2011). In July, 2012, Twitter attracting an estimated 45 million unique visitors (Complete.com/Twitter, 2012).

LinkedIn, one of the largest professional social networks, is predicted to have more than 5.3 billion professional searches in 2012 (LinkedIn, 2012). As of June, 2012, more than two new members per second enrolled in the site.

YouTube, founded in 2005, is the one the premier online video communities (YouTube, 2012). More than 72 hours of video are uploaded each minute and more video is uploaded in one month more than the three major U.S. networks created in 60 years.

Another other technology is that of blogging. Technorati, a blog search engine, tracks more than 33,200 business blogs alone (Technorati, 2012).

China's leading content portal is Sino.com. Weibo is Sina.com's Twitter-like social media service, which boasts of 200 million registered users (FlorCruz and Shao, 2011).

## **PREVIOUS RESEARCH**

Previous research has explored several facets of electronic social media in the business world. In addition, researchers have studied user trust, motivational factors, online privacy concerns, media effects, and negative online behavior.

Forrester (2011) surveyed 200 U.S.-based marketers at medium and large companies to evaluate and articulate how effectively companies listen and engage online with their customers. Nearly all respondents, 97%, indicated that they have adopted social media tactics and 50% claim that although it is not a core function, they are serious about their social media efforts.

A study of the Fortune 50 firms examined each company website to determine the implementation and usage of Twitter (Case & King, 2011). Researchers examined web pages of the 2009 Fortune 50 firms as listed on the *CNN Money*. Results indicate that the majority, 54%, of firms have a Twitter account. Moreover, 37% of these firms have multiple accounts. Although usage varies by industry sector, 85% of the companies utilizing Twitter use the technology for news distribution. Twitter was used to a much lesser extent for marketing/promotions, customer service, and human resources and, therefore, has potential to be a marketing opportunity for each organization.

An examination of undergraduate students found the user's perceived playfulness and perceived value of online connections have significant positive effects on their willingness to pay other members of social network sites (Han and Windsor, 2011). The results suggest that user's

trust generated from social activities can be transferred to their trust in business transactions on social network sites, thereby influencing the willingness to pay.

Another study of social networking services examined the motivational factors of users (Kim, Shim, and Ahn, 2011). Four major motives for individuals were identified: networking, collecting information, relieving stress, and recording one's history.

A telephone survey of 1000 Americans ages 18 and older found that online privacy is a concern (Ortutay, 2010). Eight-eight percent of individuals stated that they have refused to give out information to a business because they thought it was too personal or unnecessary and 86% believe that anyone who posts a photo or video of them on the Internet should get their permission first, even if the photo was taken in public.

Richards (2011) examined how Twitter is changing the delivery methods of news. Results suggest that trends are exposed because massive amounts of individuals update about a particular issue. Moreover, Twitter gives immediacy and relevancy for what individuals are talking about right now, which has sparked a rippling effect. As a result, news organizations are now tailoring their policies and procedures to maintain relevancy.

Finally, online interviews conducted by the Associated Press and MTV with 1,355 individuals ages 14-24 in the U.S. found that 71% believe that individuals are more likely to use slurs online or in text messages than in person (Cass and Agiesta, 2011). Fifty-five percent also stated observing individuals being mean to others on social networking sites such as Facebook and MySpace. In addition, 51% encountered discriminatory works or images on those sites.

Because previous studies have demonstrated that electronic social networking is becoming an important aspect of the business and social world, this study was conducted to investigate whether institutions of higher learning have decided to implement these technologies and potentially benefit from their use. As a result, this study was performed to examine Web 2.0 implementation at AACSB accredited schools of business, in particular, from an international geographic perspective.

## **RESEARCH DESIGN**

This study utilized the AACSB website list of the AACSB accredited schools of business to obtain institution names and identify each school's website URL (AACSB, 2011). Each institution's website was then examined to determine Twitter, Facebook, LinkedIn, YouTube, Flickr, and other web 2.0 technology utilization. Demographic data such as institutional control was obtained through the research office at AACSB International. Institutions were manually coded into five continental regions (Asia, Australia, Europe, North America, and South America). There were no AACSB accredited schools of business on any other continent. Social networking utilization was subsequently examined to determine if there were differences with regard to institutional control for each geographic region.

## RESULTS

A review of the 600 AACSB accredited schools of business found that institutions utilize a variety of social networking technologies. The technologies include Facebook, Twitter, YouTube, LinkedIn, Flickr, blogs, and other. The “other” category includes Alumni Network, Daily Motion, Delicious, Foursquare, Friendfeed, iTV, iTunes, MySpace, Okurt, Slideshare, Smugsmug, Viadeo, and Vimeo. The most common “other” technologies are iTunes (12 schools) and Vimeo (8 schools). Interestingly, China’s Weibo was not listed on any websites.

Table 1 provides an analysis of technology usage by continent. In terms of the 37 Asian schools of business, the primary technologies are Facebook (13.5% of schools), Twitter (10.8% of schools), and YouTube (10.8% of schools). With regard to the 11 Australian schools of business, 9.1% use Facebook, 9.1% use Twitter, and 9.1% use YouTube. No other technology was utilized. Relative to the 46 European schools of business, 45.7% use Facebook, 47.8% use Twitter, 30.4% use YouTube, 28.3% use LinkedIn, 10.9% use Flickr, 2.2% use blogs, and 8.7% use other technologies. With respect to the 500 North American schools of business, 39.4% use Facebook, 30.6% use Twitter, 21.4% use YouTube, 21.2% use LinkedIn, 9.8% use Flickr, 6.2% use blogs, and 6.6% use other technologies. In terms of the 6 South American schools of business, 50.0% use Facebook, 33.3% use Twitter, 33.3% use YouTube, 16.7% use LinkedIn, and 33.3% use other technologies. Overall, the most commonly used technologies are Facebook, Twitter, and YouTube. The least utilized technologies are LinkedIn, Flickr, blogs, and other.

Continent	Schools	Facebook	Twitter	YouTube	LinkedIn	Flickr	Blog	Other
Asia	37	13.5%	10.8%	10.8%	2.7%	2.7%	2.7%	0.0%
Australia	11	9.1%	9.1%	9.1%	0.0%	0.0%	0.0%	0.0%
Europe	46	45.7%	47.8%	30.4%	28.3%	10.9%	2.2%	8.7%
N. America	500	39.4%	30.6%	21.4%	21.2%	9.8%	6.2%	6.6%
S. America	6	50.0%	33.3%	33.3%	16.7%	0.0%	0.0%	33.3%

Table 2 details the quantity of technologies utilized by schools of business in each geographic area. Relative to Asian schools of business, 5% of schools employ only one technology, 0% use two technologies, 5% use three technologies, 5% use four technologies, 0% use five technologies, 0% use six technologies, and 0% use seven technologies. Overall, 15% of these schools use at least one form of electronic social networking.

With regard to Australian schools of business, 0% of schools employ only one technology, 0% use two technologies, 9% use three technologies, 0% use four technologies, 0% use five technologies, 0% use six technologies, and 0% use seven technologies. Overall, 9% of these schools use at least one form of electronic social networking.

In terms of European schools of business, 4% of schools employ only one technology, 11% use two technologies, 7% use three technologies, 13% use four technologies, 15% use five technologies, 0% use six technologies, and 0% use seven technologies. Overall, 50% of these schools use at least one form of electronic social networking.

With respect to North American schools of business, 5% of schools employ only one technology, 6% use two technologies, 12% use three technologies, 9% use four technologies, 5% use five technologies, 3% use six technologies, and 1% use seven technologies. Overall, 41% of these schools use at least one form of electronic social networking.

Relative to South American schools of business, 17% of schools employ only one technology, 0% use two technologies, 0% use three technologies, 17% use four technologies, 17% use five technologies, 0% use six technologies, and 0% use seven technologies. Overall, 50% of these schools use at least one form of electronic social networking.

Technologies	Asia	Aust.	Europe	North America	South America
Only 1 Technology	5%	0%	4%	5%	17%
Uses 2 Technologies	0%	0%	11%	6%	0%
Uses 3 Technologies	5%	9%	7%	12%	0%
Uses 4 Technologies	5%	0%	13%	9%	17%
Uses 5 Technologies	0%	0%	15%	5%	17%
Uses 6 Technologies	0%	0%	0%	3%	0%
Uses 7 Technologies	0%	0%	0%	1%	0%
Total	15%	9%	50%	41%	50%

Table 3 provides a breakdown of social network usage by institutional control for Asian schools of business. In terms of the public institutions, 16.7% use Facebook, 11.1% use Twitter, 11.1% use YouTube, 0% use LinkedIn, 0% use Flickr, 0% use a blog, and 0% use another social networking product. In terms of the private institutions, 10.5% use Facebook, 10.5% use Twitter, 10.5% use YouTube, 5.3% use LinkedIn, 5.3% use Flickr, 5.3% use a blog, and 0% use another social networking product. When comparing public versus private institutions, a greater percentage of the public institutions have implemented Facebook, Twitter, and YouTube. A greater percentage of the private institutions have implemented LinkedIn, Flickr, and blogs. There were no significant differences between public versus private implementation.

Program	Schools	Facebook	Twitter	YouTube	LinkedIn	Flickr	Blog	Other
Public	18	16.7%	11.1%	11.1%	0.0%	0.0%	0.0%	0.0%
Private	19	10.5%	10.5%	10.5%	5.3%	5.3%	5.3%	0.0%
% Difference		-37.1%	-5.4%	-5.4%				
Chi-Square Difference		.585	.954	.954	.324	.324	.324	

Table 4 provides a breakdown of social network usage by institutional control for Australian schools of business. There were no private institutions so a comparison was not possible.

**Table 4: Australian Social Network Usage ny Institutional Control**

Program	Schools	Facebook	Twitter	YouTube	LinkedIn	Flickr	Blog	Other
Public	11	9.1%	9.1%	9.1%	0.0%	0.0%	0.0%	0.0%
Private	0	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
% Difference								
Chi-Square Difference								

Table 5 provides a breakdown of social network usage by institutional control for European schools of business. In terms of the public institutions, 37.9% use Facebook, 34.5% use Twitter, 20.7% use YouTube, 20.7% use LinkedIn, 6.9% use Flickr, 3.4% use a blog, and 6.9% use another social networking product. In terms of the private institutions, 58.8% use Facebook, 70.6% use Twitter, 47.1% use YouTube, 41.2% use LinkedIn, 17.6% use Flickr, 0% use a blog, and 11.8% use another social networking product. When comparing public versus private institutions, a greater percentage of the private institutions have implemented every technology, other than blogs. In terms of private institutions, 55.1% more use Facebook, 104.6% more use Twitter, 127.5% more use YouTube, 99.0% more use LinkedIn, 155.1% more use Flickr, and 71.0% more use other technologies. There were no significant differences between public versus private implementation.

**Table 5: European Social Network Usage By Institutional Control**

Program	Schools	Facebook	Twitter	YouTube	LinkedIn	Flickr	Blog	Other
Public	29	37.9%	34.5%	20.7%	20.7%	6.9%	3.4%	6.9%
Private	17	58.8%	70.6%	47.1%	41.2%	17.6%	0.0%	11.8%
% Difference		55.1%	104.6%	127.5%	99.0%	155.1%		71.0%
Chi-Square Difference		.170	.018	.061	.136	.258	.439	.572

Table 6 provides a breakdown of social network usage by institutional control for North American schools of business. In terms of the public institutions, 38.3% use Facebook, 28.8% use Twitter, 17.9% use YouTube, 20.2% use LinkedIn, 8.6% use Flickr, 6.3% use a blog, and 6.1% use another social networking product. In terms of the private institutions, 41.8% use Facebook, 34.6% use Twitter, 29.4% use YouTube, 23.5% use LinkedIn, 12.4% use Flickr, 5.9% use a blog, and 7.8% use another social networking product. When comparing public versus private institutions, a greater percentage of the private institutions have implemented every

technology, other than blogs. Specifically, 6.3% more of the public schools use a blog. In terms of private institutions, 9.1% more use Facebook, 20.1% more use Twitter, 64.2% more use YouTube, 16.3% more use LinkedIn, 44.2% more use Flickr, and 27.9% more use other technologies. There were no significant differences between public versus private with the exception of YouTube implementation. There was a difference between public and private YouTube usage at the .005 significance level.

**Table 6: North American Social Network Usage by Institutional Control**

Program	Schools	Facebook	Twitter	YouTube	LinkedIn	Flickr	Blog	Other
Public	347	38.3%	28.8%	17.9%	20.2%	8.6%	6.3%	6.1%
Private	153	41.8%	34.6%	29.4%	23.5%	12.4%	5.9%	7.8%
% Difference		9.1%	20.1%	64.2%	16.3%	44.2%	-6.3%	27.9%
Chi-Square Difference		.460	.193	.004**	.397	.191	.845	.457
** Significant at the .005 level (2-tailed)								

Table 7 provides a breakdown of social network usage by institutional control for South American schools of business. In terms of the public institutions, 100% use Facebook, Twitter, YouTube, and another social networking product. In terms of the private institutions, 40.0% use Facebook, 20.0% use Twitter, 20.0% use YouTube, 20.0% use LinkedIn, 0% use Flickr, 0% use a blog, and 20.0% use another social networking product. Because of the small number of institutions, a comparison is likely uninformative. Moreover, there were no significant differences between public versus private implementation.

**Table 7: South American Social Network Usage by Institutional Control**

Program	Schools	Facebook	Twitter	YouTube	LinkedIn	Flickr	Blog	Other
Public	1	100.0%	100.0%	100.0%	0.0%	0.0%	0.0%	100.0%
Private	5	40.0%	20.0%	20.0%	20.0%	0.0%	0.0%	20.0%
% Difference		-60.0%	-80.0%	-80.0%				-80.0%
Chi-Square Difference		.273	.121	.121	.624			.121

## CONCLUSIONS AND FUTURE RESEARCH

Results indicate that from a continental perspective, AACSB accredited schools of business have implemented varying types of Web 2.0 technologies. The primary technologies include Facebook, Twitter, YouTube, LinkedIn, Flickr, blogs, and other technologies. European

and South American schools had the highest implementation percentage of Facebook (45.7% and 50%, respectively) and YouTube (30.4% and 33.3%, respectively). European schools also had the highest implementation percent with respect to Twitter (47.8%) and LinkedIn (28.3%). European and North American schools had the highest implementation percentage of Flickr (10.9% and 9.8%, respectively). Finally, North American schools had the highest implementation percentage of blogs (6.2%) and South American schools had the highest implementation percentage of other technologies (33.3%).

In terms of the use of social networking technologies, 50% of European schools, 50% of South American schools, and 41% of North American schools used at least one technology. For these areas, the use of multiple technologies was prevalent. Three or more technologies were implemented by 33% of European programs, 33% of South American programs, and 30% of North American programs. This is in stark contrast to the other two continents as only 9% of Australian schools and 15% of Asian schools implemented at least one technology.

When examining institutional control, no uniformity was found among geographic area. With regard to Asian schools, a slightly greater percentage of public schools implemented Facebook, Twitter, and YouTube and a lesser percentage, relative to private schools, implemented the other four technologies. Relative to European schools, a great percentage of private schools implemented all technologies with the exception of blogs when compared to public schools. The percentage difference between private minus public with respect to nearly all technologies was large (i.e., 55.1%, 104.6%, 127.5%, 99.0%, 155.1%, and 71.0%). With regard to North American schools, a great percentage of private schools implemented all technologies with the exception of blogs with the YouTube implementation statistically significantly different than public schools. And, because there is only one public South American school and no private schools in Australia, no useful analysis could be performed.

There are three important implications from the study. One finding is that geographic area is likely a factor with respect to the decision to implement Web 2.0 technologies at AACSB accredited schools of business. When comparing continental regions, there were differences with respect to both the types of technologies and quantity of technologies implemented. In the west, as many as 50% of the schools in a area implemented a given technology such as Facebook. In the east, the largest implementation of a given technology was 13.5%. Moreover, while more than 30% of schools in the west implemented 3 or more technologies, only 15% or less of schools in the east implemented at least one technology. Overall, European schools had the highest levels of participation with regard to most technologies. This could be a function of Internet proliferation and infrastructure as western regions have highly developed and mature Internet systems. It may also be that schools in the east do not perceive value in the use of electronic social networking in schools. Moreover, differences may be a function of government control as there are Internet sites that are blocked in China, for example.

A second implication is that institutional control is a factor when examining geographic area. For example, private schools in both Europe and North America are much more likely to

implement Web 2.0 technologies than public schools. European implementation percentages are far greater, however, than North American with respect to individual technologies. It is possible that cultural factors may be influencing the differences between geographic areas.

A final implication is that because most institutions have not implemented Web 2.0 technologies, there may still be market opportunities for schools of business, in particular, eastern schools because of their small implementation incidence. Therefore, there may be first-mover advantages available for institutions that decide to use social networking technologies.

The limitations of this study are primarily a function of the nature of the research methodology and each school's website. The study examined web pages from a cursory perspective but did not contact site web masters to further examine usage. The site, for example, may have a Twitter logo but not send out Twitter messages. In addition, if a school utilizes a technology, for example, but does not have the logo displayed on the web page that is linked from the AACSB web site, then it was not counted. As a result, the social networking participation may be higher than reported in this study. Future research needs to examine usage by further segmenting geographic area. For example, it is possible that middle eastern cultures and schools utilize and implement Web 2.0 and electronic social networking dramatically differently than European institutions of higher learning. The study does, however, begin to clarify the extent of the decision to implement electronic social networking from an international perspective.

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# ADAPTING THE MARKETING EDUCATIONAL ENVIRONMENT FOR MULTI-CULTURAL MILLENNIALS: THE CHINESE EXPERIENCE

Nancy K. Keith, Missouri State University  
Christina S. Simmers, Missouri State University

## ABSTRACT

**Purpose of the Study:** *Marketing educators must adapt their teaching methodologies to reach technology savvy millennials. The task becomes increasingly complex when teaching multi-cultural millennial students for whom English is a second language.*

**Method/Design and Sample:** *A study was conducted with one hundred twenty-three Chinese millennials enrolled in an undergraduate, quantitative marketing class taught by the same English-speaking instructor during different semesters in the U.S. and in China. In China, the use of video lecture capture materials as well as face-to-face lecture provided the Chinese students with a blended course format. In the U.S., the class was taught using only face-to-face lecture. Upon course completion, the Chinese students were asked to evaluate their satisfaction with six specific aspects and the overall experience of the learning paradigm in which they were enrolled. Additionally, the students' course grades were compared. It was hypothesized that the Chinese students enrolled in the blended course would experience higher satisfaction and grades. All statistical comparisons of the two groups were performed using a one-tail t-test.*

**Results:** *Results demonstrate that the Chinese millennials in the blended class felt that repeated viewing of the video materials was necessary to facilitate learning, had higher performance, and were more satisfied with the marketing educational experience.*

**Value to Marketing Educators:** *This study is important to marketing educators who are striving to teach millennials in a culturally inclusive environment. As university classrooms fill with an increasing number of international students and as we prepare domestic students to enter the global economy, incorporation of appropriate technologies can aid marketing educators in enhancing the learning experience and in building intercultural competencies.*

**Key Words:** *Millennials; Blended; Chinese; Technology; Multi-Cultural*

## INTRODUCTION

As noted by Hawes (2004), “Effective teachers must evolve to achieve success within a constantly changing environment.” Part of the changing educational environment involves meeting the needs of the technology savvy millennials. Although the definition of millennial differs by source, generally millennials are considered those born in the 1980’s or 1990’s and in the 20-35 age bracket. According to a study by Zickuhr at the Pew Research Center (2011), millennials were found to be far more likely to own technology devices than previous generations. Additionally, millennials were found to take advantage of a wider range of functions on those devices. For example while most cell phone users were determined to use only two non-voice functions (photo and text messaging), a majority of millennials use an additional five functions (online, email, games, music, and video). Millennials were raised in a technology rich environment. Generally speaking, this generation does not consider computers or digital devices as technology. In fact, millennials may hold the opinion that technology is viewed as such only by those who were born before it was invented.

Technology pervades the way millennials learn, play and communicate. Their penchant for technology leads them to be active information seekers and information creators. They are multitaskers, collaborative, connected and social. The life of millennials is 24-7. Thus, the anytime, anyplace educational environment is well suited to their lifestyle. However, many advanced marketing classes, such as quantitative marketing research, are only offered in the traditional face-to-face environment. Through the incorporation of cooperative, discovery-based, active learning exercises along with much class participation and discussion, the face-to-face learning experience can be made more productive and rich for the new generation of learners. However, the exact same face-to-face pedagogy may prove disadvantageous for millennials who experience English as a second language.

For many “English as a second language” millennials, the English-speaking classroom may be a challenge. Their lack of language fluency as well as the unique nomenclature used in a quantitative marketing research class may leave international students feeling overwhelmed, frustrated and discouraged. A blended classroom environment where some interactions are internet-based may be more suited to the success of students whose native language is not English. One such group may be Chinese millennials.

American colleges and universities are seeing dramatic increases in the number of Chinese undergraduates on campus. In fact, the number of Chinese undergraduates enrolled in American colleges and universities has tripled in the last three years to approximately 40,000 individuals (Bartlett & Fischer, 2011). There is also a dramatic increase in Chinese application volume to U.S. graduate programs. Graduate applications from China rose to 18 percent this fall, the seventh consecutive year of double-digit gains from that country (Korn, 2012). As a result, Chinese students are now the largest group of foreign students on American campuses.

Due to unique cultural differences and communication styles, Chinese millennials may be one such group that would greatly benefit from blended instruction.

### CHINESE MILLENNIALS

With the great influx of Chinese students in American colleges and universities, it is important to understand the contrast in Asian and Western communication styles. Chinese millennials may be as equally technologically savvy as their Western counterparts or even more so. However due to their culture, many Chinese millennials still embrace the tradition of rote learning with heavy emphasis on professorial lecture and do not view classroom discussion and interaction as an important component of learning (Jin & Cortazzi, 1998; Li, 2005; McKay & Shchaetzel, 2008). As shown in Table 1, Chan (1992) provides an interesting summary of the contrast in communication styles between Asian and Western cultures. When viewing the contrasts, it is understandable that Chinese students may experience unique difficulties in a verbally expressive, Western learning environment. In addition, Chinese students' reticence to communicate in the English language classroom may be further exacerbated by their level of English language proficiency. Lack of English language skills may make Chinese millennials feel self-conscious when conversing with professors or peers.

<b>Table 1: The Contrast in Asian and Western Communication STYLES</b>	
ASIAN	WESTERN
Indirect	Direct
Implicit, nonverbal	Explicit, verbal
Formal	Informal
Goal oriented	Spontaneous
Emotionally controlled	Emotionally expressive
Self-effacing, modest	Self-promoting, egocentric

Viewing the differing communication styles in Table 1, it is easy to understand the disconnection that many Chinese students experience with their Western contemporaries as well as their Western professors in the classroom environment. However according to Pak and Tan (2010), classroom involvement is important for Chinese millennials to build interpersonal skills, generate new ideas, foster creativity and encourage creative thinking. However, the authors also point out the negative effects and consequences that direct, classroom criticisms from professors and peers have on Chinese students' desire and motivation to communicate. The fear of potentially embarrassing, face-to-face communications is a limiting influence on the Chinese students' willingness to be an active classroom participant.

The fear of public embarrassment may be lessened for Chinese millennials through the incorporation of class participation via technology. The idea of teaching with technology is furthered by Wilson (2004) as he notes that with millennials a variety of teaching strategies is

required. Whether Chinese or Western, millennials' achievement orientation is challenged by failure. Thus adapting teaching pedagogies to include the millennial comfort zone of technology may prove helpful to promote and ensure learning for both groups; Chinese and Western.

Western millennials have grown up surrounded by technology. A large majority of these people grew up in single parent homes and tend to favor some traditions from previous generations. These millennials enjoy teamwork, are good at multitasking, have short attention spans and need constant stimulation. According to Du (2011), Western millennials like to stay busy and ask a lot of questions but require structure and deadlines.

In contrast to Western millennials, Chinese millennials are the first generation of China's One Child Policy. Chinese leader Deng Xiaoping established China's one child policy in 1979 to limit population growth and stimulate the Chinese economy. These Chinese millennials are considered "little emperors" (Arora, 2005) because their parents and grandparents pin their hopes on their one child, investing heavily in their future. This can be very stressful for members of this generation who are under great pressure to find employment and affordable housing (Haines, 2010). Chinese millennials tend to be more individualistic than their predecessors, seeking self-actualization rather than working hard to get rich. They are heavily influenced by Western culture and materialism, yet proudly support their own culture (McEwen et al., 2006).

When examining cultural tendencies of West versus East, Parker et al. (2009) found results that challenge the traditional assumptions that Western countries exhibit individualistic tendencies and Eastern countries exhibit collectivistic tendencies. Interestingly, the American students are beginning to show increases in collectivism, while the Chinese students are beginning to show increases in individualism. This may reflect the globalization of trade and/or the adaptation of students exposed to different cultures during their education experience. Changes due to globalization may present even more complex and dynamic learning delivery challenges in a multicultural classroom environment.

### **LEARNING DELIVERY MODE**

Teaching a new technically savvy generation requires innovation in learning delivery modes. "The new learning environment...should be active, collaborative, experiential, team-based and as self-paced as possible" (Matulich et al., 2008, p. 1). These students need time to reflect on the information and to determine why it should matter to them. Online learning is one such delivery mode that offers an anytime, anyplace learning environment where students can access instructional material in small chunks on their terms and can replay portions as needed, something not possible in a live classroom. Online learning also offers access to websites, videos, recorded guest lectures, Wikis, blogs, virtual marketplaces and online communities – all within the millennial's comfort zone.

Blended course delivery is a hybrid that offers students the best of both worlds: the on-demand, multimedia features of the Internet and the face-to-face interaction of the classroom

(Klein et al., 2006). Blended learning expands the physical boundaries of the classroom and has been shown to be more effective than either online or face-to-face course delivery alone for teaching both declarative and procedural knowledge (Sitzmann et al., 2006). Generally, blended courses are also rated by students as significant improvements over face-to-face delivery alone (Hiltz & Turoff, 2005). Klein et al. (2006) demonstrated that learners experiencing blended course delivery had significantly higher motivation to learn than with classroom learning alone, which positively impacted their satisfaction with the course, metacognition, and their grades. However, the question remains as to the effectiveness of these delivery modes in a millennial, multicultural learning environment.

### **A STUDY WITH CHINESE MILLENNIALS**

As colleges of business become more culturally integrated, the dynamics of the classroom experience change. When the cultural changes are coupled with the challenge of teaching millennial students, finding successful teaching strategies becomes a top priority. Further when the cultural integration involves native Chinese students in a face-to-face, English-speaking, quantitative marketing class, there is no question that creative approaches to teaching are necessary.

A study was conducted with Chinese millennials enrolled in a quantitative marketing class taught by the same instructor during different semesters in the U.S. and in China. In China, 74 Chinese millennial students were enrolled in a blended format of the course. In the U.S., a total of 49 Chinese millennial students were enrolled in three separate sections of the classroom format of the course; each section also contained a majority of domestic students. In both the U.S. and China classes, the entire semester's reading materials were posted on the password protected course web site prior to the first day of class. Whether taking the class in the U.S. or China, the Chinese students had access to all written materials well in advance of the face-to-face lecture and had adequate time to read, translate and comprehend the lecture material.

In addition to the posted reading materials, examples and homework problems were also discussed in the face-to-face classroom lecture. The homework involved 71 marketing research consulting problems that required quantitative analysis as well as managerial interpretations and recommendations. The homework problems mirrored the research examples provided in the written materials. Prior to traveling to China and with the assistance of the university's online personnel, the instructor spent many hours capturing on video the strategic lecture material concerning the marketing research problem solutions. The video materials were transferred to DVD, delivered to China, and available to the Chinese students well in advance of the first day of class.

In China, the use of video materials as well as face-to-face lecture provided the students with a blended course format. To ensure comprehension of the course material, the Chinese students could review the video material at their convenience as many times as desired. The

Chinese students taking the course in the U.S. did not have this additional benefit. In the U.S., the class was taught using only face-to-face lecture. Thus when the instructor taught the class in the U.S., neither the Chinese nor U.S. students were provided access to the video materials. In the U.S., the Chinese students were exposed to the examples and marketing research homework problem solutions only once in the face-to-face classroom environment.

Whether in the U.S. or China, at the end of the course the Chinese students were asked to evaluate six specific aspects and the overall experience of the English-speaking instructor's in-class presentations and discussions of the marketing research consulting homework problems. More expressly, all Chinese students were asked to evaluate the first seven items shown in Table 2. All responses were recorded using a 5-point Likert scale where 1=strongly agree and 5=strongly disagree. In addition, the students taking the course in China were queried as to the necessity of and the frequency with which they viewed the video materials. Finally, course grades of the Chinese students taking the class in the U.S. were compared to the grades of the Chinese students taking the class in China.

<b>Table 2: Chinese Student's Evaluation of the Learning Paradigm</b>
Please evaluate the following aspects of the English-speaking instructor's in-class presentations and discussions of the marketing research consulting homework problems.
1. It was difficult to understand the instructor's presentations and discussions.
2. It was necessary to translate many of the English terms into Chinese in order to comprehend the in-class presentations and discussions.
3. The instructor spoke too quickly to allow adequate comprehension of the in-class presentations and discussions.
4. It was difficult to understand the quantitative analyses while they were being presented in class.
5. It was difficult to understand the managerial interpretations and recommendations while they were being presented in class.
6. Due to language differences, it was uncomfortable asking questions or contributing to the classroom discussions.
7. Overall, the in-class presentations and discussions were not adequate instruction for non-English speaking students.
8. <i>(Asked only of the students in China)</i> It was necessary to view the video materials in order to understand the in-class presentations and discussions.
9. <i>(Open ended question and asked only of the students in China)</i> How many viewings of the video materials were required in order to understand the in-class presentations and discussions?

It was postulated that the Chinese millennial students would avail themselves of technology such as lecture capture video when provided. Further if technology facilitates teaching millennial multi-cultural students, then the following statements would hold true.

*H1: The Chinese millennial students who had access to the technology of lecture capture video were more satisfied with the six specific aspects and the overall experience of the English-speaking instructor's in-class presentations and discussions of the marketing*

*research consulting homework problems than the Chinese millennial students who did not have access.*

*H2: The Chinese millennial students who had access to the technology of lecture capture video had higher course grades than the Chinese millennial students who did not have access.*

All statistical comparisons of the two groups of Chinese students were performed using a one-tail t-test.

## **RESULTS AND DISCUSSION**

The Chinese millennial students who had access to the technology of lecture capture video strongly agreed that viewing the video materials was necessary in order to understand the English-speaking instructor's in-class presentations and discussions of the marketing research consulting homework problems (see Table 3). Further, the Chinese students who were provided the technology of lecture capture indicated that they required on the average 4.2 viewings of the video materials in order to understand the in-class presentations and discussions. Thus the postulate that the Chinese millennial students would avail themselves of technology such as lecture capture video held true.

Both groups of Chinese millennial students, those who had access to video and those who did not, agreed that it was difficult to understand the English-speaking instructor's in-class presentations and discussions, that it was necessary to translate many of the English terms into Chinese, and that the instructor spoke too quickly to allow adequate comprehension. In a total immersion, face-to-face lecture class, this would seem a reasonable expectation for most multicultural students whose first language is not English.

Interestingly though, the Chinese millennial students who were provided the video technology indicated less difficulty understanding the quantitative analyses and managerial interpretations and recommendations presented by the English-speaking instructor in the face-to-face classroom presentations and discussions. And although still somewhat uncomfortable, the Chinese students who were provided the video technology advantage indicated less discomfort asking questions and contributing to classroom discussions than those who did not have access to the video technology. Similarly, the Chinese millennials provided with video access felt more satisfied with the overall in-class experience than the Chinese millennials without the technology advantage.

Please evaluate the following aspects of the English-speaking instructor's in-class presentations and discussions of the marketing research consulting homework problems.	Mean <sup>1</sup>		p-value
	No access to lecture capture video (n=49)	Access to lecture capture video (n=74)	
1. It was difficult to understand the instructor's presentations and discussions.	1.9	2.0	>0.10
2. It was necessary to translate many of the English terms into Chinese in order to comprehend the in-class presentations and discussions.	1.2	1.1	>0.10
3. The instructor spoke too quickly to allow adequate comprehension of the in-class presentations and discussions.	1.2	1.3	>0.10
4. It was difficult to understand the quantitative analyses while they were being presented in class.	1.5	2.4	<0.0001
5. It was difficult to understand the managerial interpretations and recommendations while they were being presented in class.	1.3	2.1	<0.0001
6. Due to language differences, it was uncomfortable asking questions or contributing to the classroom discussions.	1.4	1.9	<0.0001
7. Overall, the in-class presentations and discussions were not adequate instruction for non-English speaking students.	1.2	1.4	0.0169
8. <i>(Asked only of the students in China)</i> It was necessary to view the video materials in order to understand the in-class presentations and discussions.	---	1.1	---
9. <i>(Open ended question and asked only of the students in China)</i> How many viewings of the video materials were required in order to understand the in-class presentations and discussions?	---	4.2	---
Average Grade %	80.3	86.8	<0.0001

<sup>1</sup>Questions 1 through 8, 1=Strongly agree, 5=Strongly disagree

Finally, the overall average grade percentage for the group of Chinese students with video access was 86.8. For the group of Chinese students without technology access, the overall average grade percentage was significantly lower at 80.3. For Chinese millennials, technology appears to be an important component of the learning experience.

### IMPLICATIONS FOR MARKETING EDUCATORS

Consideration of the technological instructional preferences of millennials is important to providing an effective learning environment. This may be even more true when creating a culturally-inclusive classroom for millennials. As university classrooms fill with an increasing number of international students and as we prepare domestic students to enter the global economy, marketing pedagogies must keep pace. As this study and others such as Levin and Davis (2007) have demonstrated, through the incorporation of appropriate technologies

marketing educators can provide opportunities for millennial students, both for those who are native English-speakers and those for whom English is a second language, to further their learning, enhance language skills, and practice making connections with their classmates in a supportive environment. When marketing educators view the classroom as an opportunity to build intercultural competencies among technology savvy millennial students, technology becomes an increasingly important means to the end.

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# CHEATING IN HIGHER EDUCATION: THE CASE OF MULTI-METHODS CHEATERS

Laurent Josien, Utah Valley University  
Britton Broderick, Utah Valley University

## ABSTRACT

*Cheating in academia has been the focus of several studies, mainly trying to determine how often students cheat. This paper examines a different approach, as we not only surveyed the level of cheating occurring in university setting, but also focus on ascertaining whether or not students are willing to cheat their way to a degree by using multiple ways of cheating throughout their college years. We used a survey presenting 16 different scenarios that was submitted to students asking them whether the action of the fictional students in the scenario constituted cheating or not. The analysis of the results showed that cheating does occur in college and that a certain number of students do use several methods of cheating while trying to earn their degree.*

**Keyword:** *Academic dishonesty, Higher Education.*

## INTRODUCTION

In the academic world, a major problem exists. That issue is cheating. Pullen, Ortloff, Casey, and Payne (2000) refers to it as “the bane of higher education” (p.616), and Moffatt advance that “the university at the undergraduate level sounds like a place where cheating comes almost as naturally as breathing, where it’s an academic skill almost as important as reading, writing, and math” (in Whitley, 1998, p.2). However, determining how many students cheat is difficult to figure out precisely as most data comes through self-reporting, and it is likely that students do not want to advertise their cheating, making measurement difficult.

Nevertheless, several studies tried to establish a baseline of how many students engage in academic dishonesty. One of the first studies (Baird, 1980) found that 75.5% of undergraduates from several majors had cheated while in college. In 1992, Meade reported a rate of cheating of 87% in various majors at top universities. McCabe and Trevino (1997) reported a range of 13% to 95% of students cheated at one point during their academic career. In his 2005 study McCabe reported that 70% of the 50,000 undergraduate students surveyed from 2002 to 2005 had cheated; the data was gathered from over 60 campuses nationwide. In his research Park (2003) advanced that a minimum of 50% of students are cheating. Other studies put that percentage at

63% (Nonis and Swift, 1998), or even up to 75% (Kidwell, Wozniak, and Laurel, 2003; Chapman, Davis, Toy, and Wright, 2004). Moreover, Whitley (1998) reviewed 46 studies conducted from 1970 to 1996; the range of the number of students engaging in academic dishonesty was from 9% to 95% across the different samples. The mean across the samples was 70.4%. This mean is similar to the number found by Kidwell, Wozniak, and Laurel in their 2003 study, where students self-reported any academic dishonest activity that they had participated in more than once. According to that measure 74.5% of students are cheaters. Those who only cheated once were not included because they are less of a threat to the academic community. Furthermore, students also reported to more frequently cheating in forms that they considered less serious such as collaboration and plagiarism of small excerpts.

Also, there is a developing body of evidence that academic dishonesty is increasing; with the increase in tuition, the advance in technology, and the increase in online class offerings, new ways to engage in academic dishonesty are available for potential cheaters (Born, 2003; Park, 2003; Scanlon, 2004; Eastman, Iyer, and Eastman, 2006; Brown, McInerney, 2008, Josien and Seeley, 2012). Indeed, Brown and McInerney found significant increases in 7 of 16 cheating practices between a 1999 and a 2006 sample using the same questionnaire, with an average usage increase of these 7 practices of 19.2%. Finally, one of the latest studies confirms this trend, Jones (2011) found that 92% of her students surveyed indicated that they had or they knew someone that cheated. Finally, Mason (2006) also report an increase in cheating, reported to be as occurring frequently to very frequently by 61.7 percent of students. Furthermore, it is disheartening to know that many students (52.1 %) perceive cheating as only a minor problem at their university. (Mason, 2006).

Therefore, the only conclusion that one can have is, that cheating does take place in higher education and that the number of participants is significantly high. This is a very important issue as Nonis and Swift (2001), based on the study of 1,051 business students, reported that the frequency of cheating in college was highly correlated with cheating at work. Also, Lawson (2004) found that business school students who cheat are more likely to be accepting of unethical workplace behavior, and there is a growing body of evidence that a positive correlation between cheating while in college and behaving unethically while at work exists (Brown & Choong, 2005; Nonis & Swift, 2001; Sims, 1993; Hilbert, 1985).

In addition, academic dishonesty has several impacts on students that do not engage in cheating. First of all, many firms that engage in on-campus recruiting require a minimum grade point average for students who sign up for interviews. Thus, students who engage in academic dishonesty may gain an unfair advantage that goes well beyond the higher grade earned through cheating. GPA is also typically considered an important selection criterion for hiring purposes. Finally, another way in which peers of the cheaters may be harmed is the potential backlash and scrutiny that may be implemented once a cheater has been caught, as well as the potential for distrust and poorer interpersonal relationship between students and faculty.

## LITERATURE REVIEW

Most studies on academic dishonesty focused on situational and individual factors that may contribute to cheating behavior (McCabe and Trevino, 1993, 1996, 1997; Straw, 2002; Eastman, Iyer, Eastman, 2006). More specifically, McCabe and Trevino (1997) found that cheating was influenced by age, gender, grade point average, peers, and Greek membership.

The literature found that younger, immature students cheat more than older, more mature students (Choong and Brown, 2007); upper division classes encounter less cheating than lower division classes, and unmarried students cheat more than married ones. (Whitley, 1998; McCabe and Trevino 1997; Park, 2003; Straw, 2002).

Crown and Spiller (1998) looked at 16 previous studies on the relationship between gender and academic dishonesty, and found mixed statistical results. Klein, Levenburg, McKendall, and Mothersell (2006) established the same inconsistency regarding gender and cheating. They reported that about half the studies analyzing gender and academic dishonesty showed that males cheat more often than females, while the other half found no relationship. However, McCabe and Trevino (1997) found men to be more involved than woman in academic dishonesty. The same tendency was found by Buckley, Wiese, and Harvey (1998) and Chapman and Lupton (2004), who also reported a higher probability of males engaging in academic dishonesty than females. On the other hand, Leming (1980) reported that under a low risk condition, woman cheated more than men, but that a higher risk of punishment reduced the risk of cheating only for women. More recently, Anitsal, Anitsal, and Elmore (2009) found that both genders are engaged in cheating behaviors, but that their approaches to cheating were different. Also interesting to note is that Kisamore, Stone and Jawahar (2007) found that women are now rivaling men in the amount of academic misconduct at the university level.

Regarding grade point average, Crown and Spiller (1998) analyzed 14 studies focusing on grades and academic dishonesty. They established that the majority of studies found that students with lower GPAs cheat more than students with higher GPAs. Straw (2002), also reported that students with a lower GPA are more likely to cheat as they have more to gain and less to lose than students with a higher GPA. Finally, Choong and Brown (2007) reported that GPA is inversely related to flagrant cheating, but found no significant difference in other types of cheating among brighter students and their counterparts.

On the subject of peers, McCabe and Trevino (1997) found that “the most powerful influential factors were peer-related contextual factors... Academic dishonesty was lower when respondents perceived that their peers disapproved of such misconduct, was higher among fraternity/sorority members, and was higher when students perceived higher levels of cheating among their peers” (page 391). In a similar manner, results from student samples suggested that they cheat less when they feel that they are more likely to get caught (Corcoran and Rotter, 1989) and when their college has a known honor code (May and Lyod, 1993; McCabe and Trevino, 1993).

Regarding Greek membership, several studies advance that students involved in Greek life are more likely to cheat (McCabe and Trevino, 1997; Straw, 2002; Park, 2003). One of the main reasons for such behavior is grounded in the fact that fraternities are environments where norms, values, and skills associated with cheating can easily be shared as they provide access to resources (e.g. old test files) that facilitate academic dishonesty (McCabe and Trevino, 1997, page 383).

Kisamore et al (2007) notes that one of the best things institutions can do to reduce the amount of academic dishonesty is to build a culture that promotes professional behavior and ethical conduct. This importance can be communicated by adopting an honor code, and making it easier to report detected academic dishonesty, with penalties that can serve as proper deterrents. Also for business students, Glenn (1992) shows that students who have completed a standalone business ethics course are less likely to cheat than those who haven't gone through an ethics class. Bloodgood, Turnley, and Mudrack show in their 2007 study that ethics courses had more pronounced effects on those who scored low in religiosity, as well as those who scored higher in intelligence. For those who scored low in intelligence, cheating remained about the same after an ethics course. Those with high intelligence and religiosity were much less likely to cheat than their peers and in those with high religiosity scores but low intelligence scores religiosity has much less effect on cheating.

As Kidwell et al (2003) mentioned, there are different ways of cheating with various level of seriousness. They also ventured that there is a difference in the threat to the academic community from students cheating once compared to students cheating multiple times. Following that line of thought, we advance that not only students who cheat multiple times are a threat to academia but those who cheat multiple times with different methods are even more of a threat as it indicates a clear, conscious, active decision to engage in academic dishonesty. We formulate that these multi-methods cheaters are individuals that considers cheating as an acceptable mean to achieve their end, and that they adapt their method to the opportunity available to them at the time. This attitude should put these students in a different group altogether, as they are different than students who cheated only once.

However, there is a gap in the literature as we could not find any study that quantified that aspect of academic dishonesty in a university setting.

Our goal, then will be to determine not only the prevalence of academic dishonesty in our sample but also to discover what percentage of cheaters are pursuing several methods of cheating during their curricular activities.

## **METHODOLOGY**

A total of 16 scenarios were created for the study (see Appendix A for the full questionnaire). Some example scenarios are: "Jane is taking a test in a learning center by herself. She is stumped by one question and texts her friend Maria for help. Maria responds with an

incorrect answer.” and “John is taking a test in class, while professor Absent Minded is not looking, John looks at his friend Jane’s test and sees that she answered “C” for question #5.” Each respondent was then asked if Jane, John, or both were cheating. The scenarios can be grouped into four categories of cheating: in class collaboration (voluntary or involuntary), out of class collaboration (i.e. take home exam), improper use of technology (i.e. cell phone), and plagiarism.

The surveys were distributed to students in institutions located in South Dakota, Louisiana, and Utah. The institution in South Dakota is a small faith based liberal art college, while the one in Louisiana is a regional extension of a large state-funded university, and the institution in Utah is a large state university.

In order to select our respondents for the survey, a convenient sampling methodology was used; surveys were administered during class time and were collected a few minutes after being handed out, usually as students exited the class. As anonymity was guaranteed, it wasn’t possible to track who had responded or not to the survey; therefore, a response rate cannot be precisely calculated. However, we estimate that the response rate associated with our study is in the high 80% rate based on the number of surveys distributed and the number returned completed (some students could have been enrolled in several surveyed classes). In total, we obtained 256 usable surveys that we used to conduct our analysis, with 76 surveys done by freshman, 52 from sophomores, 73 from juniors and 54 from seniors.

## RESULTS

### **Prominence of academic dishonesty**

In our sample, 95 students self-reported that they had previously cheated in college. That number put our percentage of students cheating in the low range compared to other studies. Indeed, only 37.11% of the respondents indicated that they have cheated.

Further analysis per classification of student showed that freshmen and sophomores seem to cheat less than their junior and senior counterpart. Table 1 shows the number of students that reported cheating per student classification. Percentage wise, students in higher classifications are more likely to have engaged in academic dishonesty than students in lower classifications. In our sample, juniors were the most likely to have cheated at least once in their college education (51.47%). An ANOVA analysis showed no statistical significance between the four groups of students, therefore, no classification of students is more likely to cheat than any other classification.

	Freshman	Sophomore	Junior	Senior
N	76	52	73	54
Cheater	21	18	36	20
%	27.63	34.62	49.31	37.04

### Prominence of multi-methods of cheaters

The analysis of our responses yielded that 38 of the 95 students who self-reported that they had engaged in academic dishonesty, not only cheated but cheated while using different methods to do so. This means that 40% of cheaters in our sample used at least 2 different methods of cheating when they cheated. Compared to our total sample, multi-methods cheaters represent slightly less than 15% of the students surveyed.

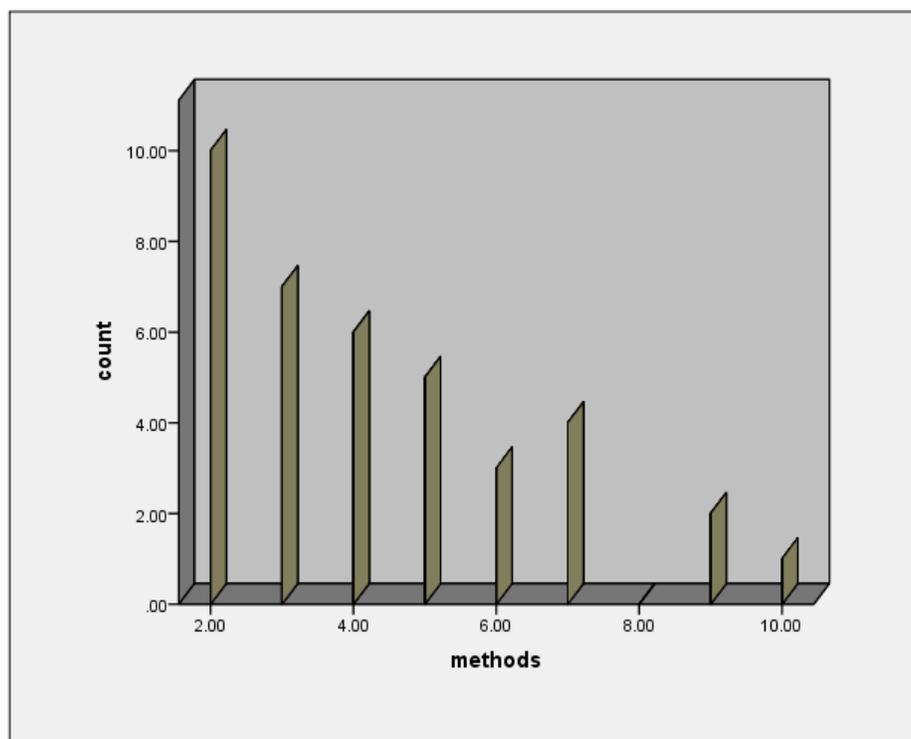
When we analyzed our results through the classification of students, we found that lower classification (freshman and sophomore) cheaters had about a quarter of them using several methods, while the upper classification (junior and senior) cheaters had half of their ranks to be multi-methods cheaters. Table 2 represents the number of multi-method cheaters per classification and its relative percentage to self-reported cheaters and to our sample.

We also found that while the highest percentage of multi-methods cheaters used 2 different methods (i.e. getting an answer from a friend during a test and working with a friend on a take-home exam), the average, multi-methods cheater uses more than 4 different means to cheat (4.31 average). Finally, the highest number of methods used reported was 10 (this particular student used 10 different ways to cheat)! Chart 1 summarizes the frequency of the numbers of methods used by the multi-methods cheaters.

Furthermore, we learned that the most common way that students cheat is the “classical” in class communication between two students (sharing a MCQ result); this method was used 29 times. The next two most common methods are out of class communication type, both receiving 25 uses, in which students worked together on a take home exam or gathered information on an upcoming test from someone that already took it. Table 3 recaps the frequency of each method used, broken down by classification of students.

	Freshman	Sophomore	Junior	Senior
N	76	52	73	54
Cheater	5	5	18	10
% sample	6.58	9.62	24.66	18.52
% cheater	23.81	27.78	50	50

Chart 1: frequency of methods used



Our questionnaire is composed of 16 fictional scenarios that can be grouped into four distinct categories of cheating. Two scenarios are related to in class collaboration (#1 and 12), five are associated with out of class collaboration (#3, 7, 11, 13, and 15), two are related to plagiarism (#2 and 9), and the remaining six are related to the use of technology in order to cheat (technological, #4, 5, 6, 8, 10, and 14).

We analyzed our results on two main axes, the first one focusing on how many categories multi-methods cheaters used, while the second axe is determining which category is the most likely to be used by cheaters.

We found that 16.79% of multi-methods cheaters engaged in all four categories of cheating while the largest percentage of multi-methods cheaters engages in two categories of cheating (14 out of 38 or 36.84%). The two most likely categories to be used by multi-methods cheaters are “outside the class room collaboration” and “inside the classroom collaboration”. “Outside the classroom” category is used by multi-methods cheaters 81.58% of the time, and is universally used among senior multi-methods cheaters. The second highest category used is “inside the classroom”, with a 65.79% chance of being utilized by the multi-methods cheaters. Finally, “technological” and “plagiarism” ended up in a tie insofar as being used by the multi-methods cheaters (44.74%). Table 4 summarizes the finding related to the categories of cheating.

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
<b>Freshman</b>	10	4	1	2	4	3	1	3	1	0	4	4	3	0	2	1
<b>Sophomore</b>	4	7	1	0	0	2	3	1	1	0	2	4	1	0	1	0
<b>Junior</b>	12	8	11	2	0	6	5	6	4	5	11	8	10	2	7	2
<b>Senior</b>	3	1	7	0	1	0	7	1	3	2	8	3	11	0	3	2
<b>total</b>	29	20	20	4	5	11	16	11	9	7	25	19	25	2	13	5
1	In class collaboration (voluntary)															
2	Plagiarism															
3	Out of class collaboration															
4	Technological															
5	Technological															
6	Technological															
7	Out of class collaboration															
8	Technological															
9	Plagiarism															
10	Technological															
11	Out of class collaboration															
12	In class communication (involuntary)															
13	Out of class collaboration															
14	Technological															
15	Out of class collaboration															
16	Technology															

	# of Cheaters	# of categories used				category used			
		1	2	3	4	I	O	P	T
<b>Freshman</b>	5	1	0	2	2	4	4	3	4
<b>Sophomore</b>	5	0	2	3	0	4	2	5	2
<b>Junior</b>	18	4	7	4	3	11	15	7	9
<b>Senior</b>	10	3	5	1	1	6	10	2	2
<b>Total</b>	38	8	14	10	6	25	31	17	17
<b>I:</b>	In class collaboration								
<b>O:</b>	Out of class collaboration								
<b>P:</b>	Plagiarism								
<b>T:</b>	Technological								

### LIMITATIONS

As with any study, there are limitations to the conclusions that we can reach. First of all, our biggest limitation is that we have to rely on self-reported data. On a topic like cheating, it is easy to imagine that students may not be very forthcoming when a faculty member asks them whether or not they ever have cheated, even with the promises of anonymity. Therefore, we have

to be careful with the results that we gathered as it may not be a true reproduction of what really happened. Also, our sample size is relatively small; we only collected 256 usable surveys for our study, which for an exploratory study should be sufficient, but if we want to enhance our findings to the rest of the population, we would need to increase our sample size. Furthermore, replicating our study would increase our convergent validity.

## DISCUSSION

We set up our study to check the prominence of cheating in university setting. As expected, unfortunately, we did find that there were cheaters in our sample. Even if our academic dishonesty rate seems lower than other studies reported, there is still a significant portion of our sample that engaged in cheating, as more than 1 in 3 students indicated that they had cheated while in college.

We also found that the rate of academic dishonesty increases as students progress toward the end of their undergraduate degree, indeed, freshman are less likely to have cheated than seniors. One likely explication for that phenomenon is the simple fact that seniors have had more “opportunities” to cheat than their fellow freshman. Another explanation may also reside in the fact that seniors may have seen some of their fellow students cheat with no consequences and decided to “join the movement”, however, further research will need to be done to determine if seeing others cheat has a significant impact on one’s decision to cheat.

Another finding from our study is the fact that there is a significant portion of cheaters that use several different methods to cheat. We found that not only did 15% of our sample use diverse ways of cheating; we also found that 40% of cheaters did engage in multiple methods of cheating. This is significant as it indicates a “willingness” to engage in academic dishonesty. One could hope that a student cheats once or twice, submitting to the temptation for one reason or another, but regrets it as they know what they did was wrong. However, the same may not be said for someone that engages in multiple ways to cheat, as we believe it indicates that their values are not ethically correct. Furthermore, when we link that result to the positive correlation between cheating while in college and behaving unethically in the workplace (Brown & Choong, 2005; Nonis & Swift, 2001; Sims, 1993; Hilbert, 1985), it begins to draw a very bleak picture. If 15% of students are willing to do whatever it takes to achieve their college degrees, what are these 15% going to do when they are in the workforce? One could think that they are still going to believe that the end justifies the means, and therefore would be highly likely to engage in unethical behaviors.

An additional outcome of our study is in the type of cheating that students choose to participate in. We found that students are most likely to cheat out of the classroom. This finding indicates that for professors who use take home style exam or use at home exercises as part of their grading, caution need to be taken. If our goal is to encourage group work, then we are succeeding as a large majority of students engage in such activity, whether or not it is permitted

to do so! Indeed, 46 of 95 self-reported cheaters (48%) communicate with fellow students regarding test material. Also, if they engage in multiple methods to cheat, that percentage rises to over 81% (and 100% with the seniors in our sample). If our aim is to test individual knowledge and we expect our students to work individually, then it seems that we are sadly mistaken.

Our final thought regards plagiarism. The attention that plagiarism received in the literature is overwhelming compared to the rest of academic dishonesty. However, our research shows that plagiarism is not a top method used by cheaters. This can be interpreted in several ways: all the attention paid to plagiarism worked, and students do not engage in plagiarism as they know what it is and that it will not be tolerated, or we are paying plagiarism too much attention instead of focusing on other types of academic dishonesty.

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## APPENDIX A

### Questionnaire

John and Jane are two imaginary college students. Here are 16 different situations, please tell us if you think that any of these constitutes cheating. Once completed, return the questionnaire to the envelop provided, the last respondent will seal the envelop. To ensure anonymity, please do not write your name on the questionnaire. Participation is voluntary, if you do not want to participate or have done so in another class, return your questionnaire blank.

- 1) John is taking a test in class, while professor Absent Minded is not looking; John asks his friend Jane if “C” is the correct answer for question #2. Jane nods.
  - a) John is cheating            Yes             No
  - b) Jane is cheating            Yes             No
- 2) While writing a paper for Dr. Shake Spears, Jane goes to the library and downloads a few papers to support her writing. After reading them, she cuts and pastes in her text some sections of what she has read and she doesn’t cite her sources.

Jane is cheating            Yes             No
- 3) While working on a take home test, John asks his friend William to double-check his math for a problem that is in the test. William doesn’t find any error.

John is cheating            Yes             No
- 4) Jane’s calculator comes preloaded with mathematical formulas. John’s calculator doesn’t have some formulas in it. Both calculators are in an approved list by their professor. Before the test, John enters the missing formulas in his calculator. They both use some of the formulas during the test.
  - a) John is cheating            Yes             No
  - b) Jane is cheating            Yes             No
- 5) Jane is taking a test in a learning center by herself. She is stumped by one question and texts her friend Maria for help. Maria doesn’t respond.

Jane is cheating            Yes             No
- 6) John is taking a test in class, while professor Absent Minded is not looking; John looks at his notes in his cell phone and finds that the answer for question 3 is “D”.

John is cheating            Yes             No
- 7) While working on her take home test, Jane asks John if he found the same response for a given question. He didn’t, she checks her math and finds an error, she corrects it and now her answer matches John’s.
  - a) John is cheating            Yes             No
  - b) Jane is cheating            Yes             No

- 8) John is taking a test in class, while professor Absent Minded is not looking; John looks at his notes in his cell phone, but does not find the answer he was looking for.  
John is cheating                      Yes                       No
- 9) While writing a paper for Dr. Shake Spears, Jane goes to the library and downloads a few papers to support her writing. After reading them, she cuts and pastes in her text some sections of what she has read and she cites only a few of her sources.  
Jane is cheating                      Yes                       No
- 10) Jane is taking a test in a learning center by herself. She is stumped by one question and texts her friend Maria for help. Maria responds with an incorrect answer.  
Jane is cheating                      Yes                       No
- 11) John and Jane are in the same class, Professor Absent Minded gives a take home exam for the class. John and Jane work together on the exam.  
a) John is cheating                      Yes                       No   
b) Jane is cheating                      Yes                       No
- 12) John is taking a test in class, while professor Absent Minded is not looking, John looks at his friend Jane's test and see that she answered "C" for question #5.  
a) John is cheating                      Yes                       No   
b) Jane is cheating                      Yes                       No
- 13) John couldn't be here for a test and asked his professor if he could take it at a later time. Before taking his test, John discusses with Jane about what he **really** needs to review for the test.  
a) John is cheating                      Yes                       No   
b) Jane is cheating                      Yes                       No
- 14) Jane is taking a test in a learning center by herself. She is stumped by one question and texts her friend Maria for help. Maria responds with the correct answer.  
Jane is cheating                      Yes                       No
- 15) Professor Absent Minded likes to use listing questions in his test (i.e. list the Marketing four Ps). John knows that and writes possible questions and answers on paper to help in his review. Jane asks John if she can use his review notes.  
a) John is cheating                      Yes                       No   
b) Jane is cheating                      Yes                       No
- 16) Jane's calculator, which is approved by her mathematics professor, comes preloaded with mathematical formulas. Before a test, Jane entered more formulas in her calculator. Jane didn't use any of the extra formulas during the test.  
Jane is cheating                      Yes                       No



# DOCTORAL TRAINING IN TEACHING AND PREPAREDNESS OF EARLY-CAREER MARKETING EDUCATORS

Timothy C. Johnston, Murray State University

Martin I. Milkman, Murray State University

James P. McCoy, Murray State University

## ABSTRACT

*A survey of 96 recent marketing PhD graduates from 60 universities investigated the degree of teacher training in doctoral programs. The early-career professors also reported perceptions of their teaching preparation and performance. The data revealed that most doctoral candidates (87%) had full responsibility for a course, and 58% had formal teacher training during their doctoral programs, including 31% who completed a graduate course on teaching for credit. This is an improvement over Griffith (1997) which reported 75% of candidates had full responsibility for a course, and 52% had formal teacher training during their doctoral programs, including only 11% who completed a graduate course on teaching for credit. Those who did have training felt “well prepared” for teaching at the start of their careers, as compared to those without training who felt only “adequately” to “well prepared” on average. On average, early-career professors also reported good student ratings and good enthusiasm for teaching. Marketing doctoral teaching training has increased, to the benefit of early-career professors; yet the over 40% of professors who lack formal training suggests that there is more to be done.*

## LITERATURE REVIEW

Research on training doctoral students to teach has bemoaned the lack of formal training in graduate programs. Butler, Laumer & Moore (1994) found that a majority of colleges of business were making some efforts to improve the quality and effectiveness of their teaching assistants, but the marketing discipline in particular fell short of ensuring quality teaching in business schools.

Griffith (1997) examined marketing doctoral programs and concluded that “many universities have not fully integrated, to any substantive degree, educator training into doctoral student academic programs.” Madhavaram & Laverie (2010) concluded that “marketing educators have the responsibility to develop competence in teaching,” and that “doctoral days are the best time to start work on pedagogical competence (teaching skills).”

These research studies have concluded that doctoral teacher training efforts, specifically for marketing educators, are needed and have fallen short in the past. The need for marketing doctoral teaching training is important for early-career professors who wish to be successful in

the profession, as well as professors in doctoral programs whose responsibility it is to train future teachers.

The Association to Advance Collegiate Schools of Business (AACSB, 2012) standards for accrediting doctoral programs includes "Preparation for teaching responsibilities in higher education (for those students who expect to enter teaching careers)" as one of five learning goals normally included in a doctoral program. AACSB standards also require faculty to emphasize teaching effectiveness in their careers, as pointed out by Madhavaram and Laverie (2010), including making learning and pedagogical contributions to remain Academically Qualified by AACSB standards.

The goal to increase emphasis on teaching in business education is by no means unanimous, and Armstrong and Sperry (1994) concluded that business schools should emphasize research over teaching if they desire prestige.

This paper looks at the current state of teacher training in doctoral programs as reported by recent marketing doctoral graduates who are working in the academy. We begin by discussing the methodology of the survey and describing the sample. We conclude with results of (1) the degree of teaching and teacher training encountered by professors in their doctoral programs, and (2) the professors' perceptions of their teaching preparation and performance.

## METHODOLOGY

We conducted a survey to explore how recent marketing doctoral recipients (including ABDs) perceived the pedagogical training they received during their doctoral programs. The sample was compiled from lists of "Who Went Where" survey respondents. The American Marketing Association Doctoral Students Special Interest Group (DocSIG) produced these surveys of successful job-seekers on the marketing academic job market. This paper uses data collected from "Who Went Where" respondents from 2006 through 2010 (DocSIG, n.d.).

The survey sample included only successful job-seekers who responded to the "Who Went Where" survey; hence people who did not respond, as well as job-seekers without a job to report, were not represented. We obtained email addresses online based on the person's name and hiring institution.

The survey was presented online. A link to the survey was sent in an email to 500 potential respondents on April 14, 2011. Attempts were made to correct failed or changed email addresses. On April 25, 2011 we re-sent the request to complete the online survey. As a result of these efforts, we received usable responses from a total of 96 people, a response rate of about 19 percent.

The list of 500 graduates from 60 universities gleaned from the Who Went Where surveys is a significant proportion of the total population of marketing doctoral graduates for the years 2006-2010. For comparison, the U.S. National Science Foundation 2010 Survey of Earned Doctorates identified 891 graduates of doctoral programs in the "Marketing management and research" subfield for the years 2006-2010 (NSF, 2012). Zamudio, Wang & Haruvy (2010) gathered data from Who Went Where surveys (and university websites) to compile a set of 677 job candidates from 112 placing marketing departments from 1997-2005.

## DESCRIPTION OF RESPONDENTS

Males comprised 67% of the sample, with the balance female. Native-English speakers comprised 67% of the sample, with the balance non-native-English speakers. The average age of respondents was 36.4 years (Table 1).

Male	67%
Age	36.4 years
Native-English speaker	67%
PhD U.S. university	80%
Professor at U.S. university	60%
Tenure-track	95%
Years teaching full-time	2.9 years

All respondents listed PhD as the type of doctorate received. When asked their field, 73 listed marketing, 17 listed business administration, two listed management, and one each listed logistics, sports marketing, and psychology.

Respondents were asked “From what university did you receive your doctorate?” These data showed that respondents were mostly recent graduates (or ABD) from U.S. institutions (80%) but some non-US doctoral programs were represented (15%) and the balance was non-responses (5%). In total the doctoral programs of 60 institutions were represented (Appendix 1). The hiring institutions were also mostly U.S. institutions (60%) but some non-US hiring institutions were also represented (26%). The balance was non-responses (14%).

The responses to the question “In what year did you receive your doctorate?” were, as expected, concentrated in the years 2006 – 2010 (96%). The distribution was 2006, 18 responses; 2007, 14 responses; 2008, 22 responses; 2009, 20 responses; 2010, 23 responses. The average number of years respondents had spent teaching since leaving the doctoral-granting institution was 2.9 years.

Ninety-five percent of our respondents were in tenure-track positions, but because they were relatively early in their careers, only 2 percent were tenured. When asked “In your current position, what is the percentage of your time dedicated to teaching?” respondents reported spending an average of 39 percent of their time teaching.

## RESULTS

### Teaching Experience

Ninety-four percent of our respondents reported having teaching and/or teaching assistantship responsibilities during their doctoral program (Table 2). This is consistent with Griffith’s (1997) survey of marketing doctoral students that found 41 of 44 respondents (93%) had teaching responsibilities. In economics, McCoy & Milkman (2010) reported that 96% of

respondents in a survey of recent PhD graduates had teaching and/or teaching assistantship duties.

Eighty-seven percent taught stand-alone courses (full course responsibility) during their doctoral program, with an average 4 classes per respondent. The total number of students taught ranged from 5 to 2400, with an average of 252 students. (Twenty-two percent taught recitation sections during their doctoral program, with an average 1.4 sections per respondent.)

	<b>2012 Survey N=96</b>	<b>Griffith (1997) N=44</b>
Teaching (full course responsibility) during doctoral program	87%	75%
Teaching (full course) and/or Teaching Assistant duties during doctoral program	94%	93%
Completed graduate credit course on teaching	31%	11%
Completed non-credit program on teaching	34%	36%
Completed credit course and/or non-credit program on teaching	58%	52%

This is substantially higher than the result reported in Griffith (1997) that 75% of doctoral student respondents had full teaching responsibility in their courses. McCoy & Milkman (2010) also reported that 75% of economics PhDs taught stand-alone courses in graduate school.

### **Teacher Training**

Thirty of the respondents (31%) responded “yes” to the question: “During your doctoral program, did you attend a graduate credit course on undergraduate teaching?” Twenty-six of the thirty (87%) took the course because it was required, and twenty-five reported that the course was required of all students in the program, just those teaching as graduate instructors.

The levels of for-credit marketing doctoral teacher training found in this research were much higher than in previous studies. Griffith (1997) found that only 11% of respondents reported completing pedagogical course work. In economics, McCoy & Milkman (2010) reported that 12% of respondents in a survey of recent PhD graduates had taken a graduate credit course on undergraduate teaching.

Most graduate courses on undergraduate teaching awarded three semester hours of credit. Twenty-seven respondents reported the graduate credit hours (US equivalent) of teaching courses distributed thusly: zero credit hours, 1 response; 1 credit hour, 5 responses; 1.5 credit hours, 2 responses; 2 credit hours, 1 response; and three credit hours, 18 responses.

Respondents were asked: “Who was primarily responsible for teaching or directing this graduate credit course on undergraduate teaching?” Most respondents (58%) reported the course was taught by a “faculty member from another department within your college.” The balance was distributed fairly evenly among a “faculty member from within your department” (16%), and a “faculty member from another college” (13%), and a “non-faculty staff member” (19%).

Respondents who completed a graduate course on teaching also responded to the question: “How well did this graduate credit course prepare you for teaching?” The average

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response was 3.4 on a scale of one (very poorly) to five (very well). No person rated the course “very poorly.”

Slightly more respondents participated in a non-credit teaching training program (34%) than in a for-credit teaching course (31%). Of the 33 non-credit participants, 22 (67%) reported that the program was required, and for 15 of these individuals the program was required for all doctoral students. The balance (7) reported that the program was required only for those teaching as graduate instructors.

The larger proportion of non-credit courses found was consistent with earlier results—36% in Griffith (1997)—and in the economics literature (Walstad & Becker, 2003; McCoy & Milkman, 2010). The non-credit programs attended by our respondents averaged about 14.6 total contact hours with a minimum of 3 contact hours and a maximum of 30 contact hours.

Respondents were asked: “Who was primarily responsible for teaching or directing this non-credit program on undergraduate teaching?” Most respondents (43%) reported the course was taught by a “faculty member from another college.” The second most frequent response (37%) was a “faculty member from another department within your college.” The balance were distributed evenly among a “faculty member from within your department” (30%), and a “non-faculty staff member” (30%).

Respondents who completed a non-credit course on teaching also responded to the question: “How well did this non-credit program prepare you for teaching?” The average of 30 responses was 3.0 (adequate) on a scale of one (very poorly) to five (very well). Three people rated the non-credit program “very poorly.”

Overall 56 of 97 respondents (58%) participated in a for-credit teaching course, a non-credit teaching course, or both. These respondents are hereafter referred to as “trained.” The proportion of doctoral students who received formal teacher training was consistent with earlier results in the economics literature (Walstad & Becker, 2003). In particular, McCoy & Milkman (2010) found that 52% of respondents who taught a stand-alone course during their doctoral programs had formal teacher preparation training (for credit or noncredit).

### **Teaching Preparation and Performance**

All respondents were next asked, “Overall, how well prepared for teaching were you at the completion of your doctoral program?” Again using the 5-point scale previously described (very poor to very well), the average response was 3.7. The mean response of those who had no training was 3.5, which was lower than the mean of those who had training (credit or non-credit) at 3.9 (Table 3). The difference between means was significant at the  $P = 0.17$  level, according to a 2-tailed t-test.

We asked respondents “Please rate the level of your enthusiasm for teaching.” The 5-point scale for both questions was “very enthusiastic” being a 5 and “very unenthusiastic” being a 1. The mean response was “enthusiastic to very enthusiastic” for professors who had pedagogy training in their doctoral program (4.3) and for those who did not have training (4.2).

	Trained (n=55)	Not-trained (n=40)	Sig. (2-tailed)
How well prepared for teaching?	3.9	3.5	0.17
Enthusiasm for teaching?	4.3	4.2	0.60
Students rate you?	4.4	4.5	0.37
Rate yourself.	4.2	4.4	.04

We also asked respondents to self-report “how do your students rate you as a college/university teacher?” The 5-point scale for both questions was “very good” being a 5 and “very poor” being a 1. The mean response was “good to very good” for both professors who had pedagogy training in their doctoral program (4.4) and surprisingly higher for those who did not have training (4.5).

Respondents were asked “Please rate yourself as a college/university teacher.” The mean response was “good to very good” for professors who had pedagogy training in their doctoral program (4.2) and again surprisingly higher for those who did not have training (4.4).

While the means for self-reported “student ratings” and “self-ratings” was higher for untrained teachers than for trained teachers, the differences were not statistically significant. Regarding the statistical tests, the selection of respondents to the sample, and the assignment of respondents to treatment groups, was not random. The sample was the set of respondents to a census of the “Who Went Where” survey responders. The trained and untrained subgroups were created as a by-product of the respondents’ choice of doctoral program. Since respondents first chose to respond to the “Who Went Where” survey, and later chose to respond to the research survey, one could speculate that a positive bias toward enthusiastic and successful academics would result.

## SUMMARY

This research found that most early-career marketing professors (94%) had the opportunity to teach a full course and/or recitation sections while in their doctoral programs. Respondents reported taking full responsibility for a course in graduate school at a higher proportion (87%) than respondents to the Griffith (1997) survey (75%). On-the-job teacher training for doctoral students continues to be widely available, with an increased level of responsibility over courses.

Not all doctoral-program teachers received formal training, however. Only 58% of doctoral students participated in formal teacher training, including for-credit and/or non-credit programs. The level of formal training is greater than the level (52%) found by Griffith (1997) and consistent with recent research in economics (McCoy & Milkman, 2010). While the proportion of graduate-student teachers who received formal training has risen, it still leaves over 40% of early-career marketing professors to learn their teaching skills with on-the-job experience or informal faculty mentoring.

Only 31 percent of respondents participated in any for-credit teacher preparation training program. While this level shows that the integration of marketing teaching training into the doctoral program is far from universal, it is practiced to a much greater extent than the 11% of

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doctoral students who reported completing a pedagogy course in Griffith's (1997) study. This shows that the teaching role of the marketing professor still lacks emphasis in the academic core of marketing doctoral programs.

Respondents with marketing doctoral teacher training rated their preparation for teaching as "good" on average, whereas respondents with no formal training rated their preparation as "adequate to good." Trained teachers also reported a slightly higher level of enthusiasm for teaching, although both trained and untrained teachers rated their enthusiasm highly. One could speculate that marketing students may have benefited from the confidence and enthusiasm of the trained professors.

An AMA task force (1988) study on the academic Marketing profession concluded: "In some programs, doctoral candidates neither teach nor receive any instruction in teaching practices. Other programs require or allow students to teach but without supervision or formal training." Consequently the "lack of teaching training in doctoral programs simply shifts this training to the new PhD's first job, where it may inhibit launching a research career." The stress experienced by early-career marketing professors and the frustration of their students are two potential consequences of relying on on-the-job teaching training.

The surprising result was that self-reported student ratings and self-ratings of the untrained professors were higher than those of the trained professors. The differences were not material considering that all self-reported ratings were well into the "good to very good" (4.0 to 5.0) range. Perhaps the "head start" in teaching preparation enjoyed by the trained teachers diminishes during the first few years in the profession, such that early-career professors are comfortable and performing well after some time on the job. The extent of dropout bias in the data due to unsuccessful professors leaving academia and hence not responding to the survey is not known.

The availability of marketing doctoral teacher training has increased, and increasingly consists of graduate credit courses that are required by the doctoral program. Future research may consider additional questions about teacher training. What is the role of marketing doctoral teacher training outside of formal courses or programs, such as faculty mentoring? What is the role of early-career teacher training to remediate a lack of doctoral program training? What is the impact of doctoral teacher training on non-native English speakers who teach in U.S. universities? Marketing doctoral teaching training has increased, to the benefit of early-career professors; yet the over 40% of professors who are lack formal training suggests that there is more to be done.

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**APPENDIX 1: FROM WHAT UNIVERSITY  
DID YOU RECEIVE YOUR DOCTORATE?**

Aarhus School of Business (Denmark)  
Arizona State University  
University of Auckland (New Zealand)  
Baruch University  
Carleton University (Canada)  
Carnegie Mellon University  
Columbia University  
Duke University  
Erasmus University  
Florida State University  
Georgia Tech University  
Harvard University  
Indiana University  
Kent State University  
London Business School (UK)  
Louisiana State University  
McGill University (Canada)  
Michigan State University  
Mississippi State University  
Monash University (Australia)  
Northwestern University  
Ohio State University  
Purdue University  
RSM Erasmus University, Rotterdam (The Netherlands)  
Saint Louis University  
Southern Illinois University - Carbondale  
Temple University  
Texas A&M University  
Texas Tech University  
University of Michigan  
University of Adelaide (Australia)  
University of Arizona  
University of Arkansas  
University of Bradford (UK)  
University of British Columbia (Canada)  
University of California - Irvine  
University of Colorado - Boulder  
University of Florida  
University of Houston  
University of Illinois at Urbana-Champaign  
University of Kentucky  
University of Manitoba (Canada)  
University of Massachusetts  
University of Memphis  
University of Minnesota  
University of Missouri  
University of Nebraska  
University of North Carolina - Chapel Hill

University of North Texas  
University of Oklahoma  
University of Pennsylvania  
University of Pittsburgh  
University of Rochester  
University of Southern California  
University of Tennessee  
University of Utah  
University of Warwick (UK)  
Washington State University  
Washington University in St. Louis

# DEVELOPING A WRITTEN RESEARCH PRODUCTIVITY POLICY FOR A DEPARTMENT OF ACCOUNTING: A CASE STUDY

**Kenton B. Walker, University of Wyoming**  
**Gary M. Fleishman, University of Wyoming**  
**Teresa Stephenson, University of Wyoming**

## ABSTRACT

*The purpose of this paper is to report on experiences at the University of Wyoming, Department of Accounting when developing a written research productivity policy for use in tenure and promotion and workload assignment decisions. We discuss motivations for developing our policy document, the steps we undertook in the process, and outcomes. We hope that faculty and administrators can use our experiences, our research findings, and the exemplar we present in this paper as a starting point to develop their own policies consistent with their specific departments' missions.*

## INTRODUCTION

The purpose of this paper is to report on experiences at the University of Wyoming, Department of Accounting in developing a written research productivity policy for use in tenure and promotion (hereafter T&P) and workload assignment decisions. We use the term *research* to describe faculty activities that lead to published or other written, widely-disseminated, creative works (e.g., journal articles, books, conference papers, cases, and the like) as compared to the term *scholarship* that might encompass a broader array of outputs. Presently, the focus of our university and college administration is on increasing the output of graduates with Ph.D.s. Although our department does not offer the doctoral degree, we are impacted by this effort in that there is a corresponding push across the institution to increase the output of basic research, hence the fact we do not consider other forms of scholarship in this paper. We discuss motivations for developing our policy document, the steps we undertook in the process, and outcomes. We hope that faculty and administrators can use our experiences, research findings, and the model we present in this paper as a *starting point* to develop their own policies consistent with their specific departments' missions. In addition, we suggest how use of such policies,

including journal lists, may support proposed AACSB recommendations to align faculty intellectual contributions with institutional missions.

Academic institutions should conduct the T&P process with integrity, clarity, and fairness given that recruitment and retention of accounting faculty is critical to the success and mission of AACSB-accredited business schools (Johnson et al., 2002). Unfortunately, tenure-track faculty members do not generally perceive that tenure standards are clear, benchmarked, or well-communicated, which hinders perceptions of fairness. For example, the Collaborative on Academic Careers in Higher Education, a research project at Harvard University's Graduate School of Education, recently surveyed 6,773 tenure-track faculty members at 77 institutions. The investigators asked junior faculty members about 16 institutional policies and practices designed to help them succeed. On average, none were rated even "fairly effective" and junior faculty had the least understanding about tenure standards<sup>1</sup> This view is consistent with that expressed by our own junior, and some senior, faculty. Given that the tenure and promotion process is one of the most important and stressful endeavors in the careers of most accounting academicians (Reinstein and Calderon, 2006; Johnson et al., 2002), clarity is important.

Although most business schools evaluate accounting faculty based on the triad of teaching, scholarship, and service, recent anecdotal and empirical evidence suggests that more schools are putting added emphasis on the research component (Glover et al., 2006; Everett et al., 2003), with concomitant increasing pressures to publish in "top" academic journals (Chow et al., 2007). Some suggest that AACSB standards for academically qualified faculty are increasingly more rigorous. Even if this is not the case, it is clear that more documentation of policies and standards for scholarly activities are necessary to evaluate performance under AACSB's mission-based accreditation standards.

We organize the remainder of this paper as follows. The following section discusses our motivations for developing the written standard and the actions taken. Section three reviews literature related to contextual issues in faculty T&P evaluation of accounting research for each motivation. The fourth section discusses some potential impacts of AACSB International's *Impact of Research Task Force* for developing a research policy. Outcomes of the policy appear in section five. Finally, conclusions and recommendations appear in last section.

## **MOTIVATIONS AND ACTIONS TO DEVELOP A WRITTEN RESEARCH POLICY**

Several factors motivated us to begin in 2005 to develop written research standards for our department of accounting, part of an AACSB-accredited college of business. Our accounting department offers a non-specialized master's degree in accounting in addition to a bachelor of science degree. The college of business offers the Ph.D. in the areas of economics and marketing. Following are the principal reasons why we engaged in this effort and the corresponding actions we undertook.

### **Motivator 1**

There was substantial perceived uncertainty among faculty at our institution concerning research requirements for T&P. There was no expressed department policy and college standards were vague. A new associate dean, with a reputation for emphasizing research, led many to believe he would place greater emphasis on this area of performance than in the past. We believed written policies and standards might help alleviate this uncertainty. In addition, the policy would also be useful for prospective faculty employees and contribute to more informed employment and T&P decisions for all concerned.

**Action:** Discussed this subject at faculty meetings. Reviewed literature concerning perceptions by faculty of university T&P processes. Conducted a review of accounting literature concerning the use of journal quality rankings in T&P decisions.

### **Motivator 2**

Recent anecdotal and empirical evidence suggested that schools were placing increased pressure on faculty to publish in “top” academic journals. This was occurring in our college for two related reasons. First, the university embarked on an effort to increase the level of research activity. Although the university far surpasses the required number of Ph.D. graduates (20) in order to maintain a Carnegie basic classification as RU/H (research university/high research activity; see <http://classifications.carnegiefoundation.org/methodology/basic.php>), university administration believes an increased emphasis on doctoral education will result in greater basic research output that may lead to a RU/VH (research university/very high) classification. Related to this effort, the marketing group within our college was preparing to offer the Ph.D. degree. Many believed these efforts would have a spill-over effect on research requirements for the accounting department that offers only a master’s degree.

**Action:** Looked for articles documenting evidence of research standards increasingly targeting top accounting journals for T&P purposes. Established our intent to craft a written research policy to codify T&P standards for accounting faculty consistent with our mission and findings from items 1) and 2) above to establish standards for the department, independent of standards for T&P in other departments within the college.

### **Motivator 3**

Inter-discipline differences in the research “landscape” may lead to disagreement among college administrators and members of college and university T&P committees about the significance of scholarly achievements in accounting. Persistent conflicts at our university T&P committee led academic affairs to request that all departments prepare a statement of their promotion and tenure criteria. Conflicts between departments with and without Ph.D. programs were common in the college of business T&P committee, which we felt put accounting at a disadvantage. Specifically, non-accounting colleagues often second-guessed the opinions of accounting faculty about the quality of our own research efforts during deliberations of the college T&P committee.

**Action:** Accepted the challenge from academic affairs as another impetus to complete our written policy. Developed the policy to gain buy-in from accounting faculty and all levels of administration. Characteristics of our policy included sound reasoning based on extant research and flexibility to accommodate changes in the college and marketplace for faculty. We designed the policy to assist non-accounting faculty to put accounting research into a reasonable perspective versus other business disciplines.

### **Motivator 4**

There is a substantial literature on journal quality and publication output of accounting faculty and related ranked journal lists that are available to help develop policies for accounting research. Anecdotal evidence suggests this information is not applied formally for T&P purposes on a wide scale in accounting. This line of research goes back decades, represents broad, consensus opinions, is relatively unbiased, and consistent.

**Action:** Used this literature as the basis for a department of accounting ranked journal list and to develop research output standards consistent with department and college missions.

### **Motivator 5**

Teaching and service workloads impact research output and requirements, and vice versa. A research policy can provide a clear and rational basis for balancing these three faculty responsibilities.

**Action:** Wrote the T&P standard to link quantitative and qualitative measures of research output to correspond to varying teaching and service workloads.

The motivators outlined above are likely to be encountered at many institutions and begs the question: *Why don't we hear or read more about the use of written standards for accounting research for T&P decisions?* The answer is probably because administrators and faculty are uncomfortable applying well-defined standards for this purpose. Instead, these groups prefer to use the "I'll know it when I see it," on a case-by-case approach that provides maximum evaluator flexibility and minimum commitment when making these decisions. However, this is also the very reason why so much uncertainty exists. To deal with this issue while continuing to provide discretion in reaching an overall assessment of an individual's performance, we attempted to write a narrowly-focused standard for research performance. Given the importance of factors such as teaching performance and collegiality, we emphasized that achievement of our research standard is a *necessary but not sufficient* condition for T&P.

## LITERATURE REVIEW

Much research supports the reasons why we developed a written policy. The following sections summarize important studies in each motivational area.

### **Perceived Uncertainty about Research Requirements for T&P (Motivator 1)**

Most junior faculty perceive that T&P standards are nebulous, especially in the realm of research. For example, Jolson (1974) concluded that significant perceptual and ideological differences exist between faculty and administrators pertaining to tenure and promotion criteria, including which factors *should be* most important in a normative sense. A factor that may exacerbate differences between faculty versus administrator concerning performance in research for T&P may relate to the difficulty in objectively measuring research effectiveness (Jolson, 1974).

Clement and Stevens (1989) surveyed deans and department chairs at AACSB-member schools about the relative importance of teaching, research, and service. They concluded that department administrators across disciplines often agree on performance criteria but faculty performance appraisal systems at many institutions may not be objective (suggesting a lack of clarity for those being appraised) and they may not be able to withstand legal challenges.

Numerous external stakeholder and oversight bodies have recently suggested that academic units improve the process for granting tenure (Glover et al., 2006). For example, in 2000 the United Educators of Insurance Retention Group (UE), the American Association of University Professors (AAUP), and the American Council on Education (ACE) collaborated on a report that proposed that the tenure process could be improved if the specific criteria for

successful tenure decisions could be communicated to faculty, including clear benchmarks for scholarship (Glover et al., 2006; ACE et al., 2000). Similarly, during the past decade the AACSB has also encouraged journal lists as a means of communicating departmental scholarship benchmarks and expectations to faculty (Reinstein and Calderon, 2006).

**Emphasis to Publish in the “Top” Journals (Motivator 2)**

Concurrent with increasing stakeholder pressures for departments of accounting to establish and communicate clear research standards to faculty, there has been a recent added emphasis on academic publishing in top journals at many AACSB-accredited colleges of business (e.g., Chow et al., 2007; Glover et al., 2006). Accordingly, accounting scholars have responded with a number of literature reviews, journal rankings, and scholarship yardsticks that have considerable consensus overlap (Bonner et al., 2006; Glover et al., 2006; Lowensohn and Samelson, 2006; Reinstein and Calderon, 2006; Herron and Hall, 2005). Some studies have suggested weighting articles based on journal quality (e.g., Johnson et al., 2002; Hasselback et al., 2000), although we are not aware of any study that has specified how weightings may be applied as part of a formalized research policy that balances quality versus quantity of articles necessary for T&P.

Despite the number of articles reporting ranked lists of accounting journals, anecdotal evidence suggests that few departments of accounting build these lists into a formal research policy for T&P purposes. Another key issue departments must address in a policy is how to treat articles with multiple authors for purposes of assessing publication quality and quantity (Hasselback et al., 2000). Table 1 summarizes selected post-1999 accounting studies that assess publishing proclivity, specialization (e.g., financial, audit, or tax), discipline (e.g., accounting, finance, or management), accounting journal quality, and other issues for ranking journals.

**Table 1: Post -1999 Studies Assessing North American Accounting Journal Quality**

Study Reference (year)	Study Objective	Journal Quality Assessment Technique	Source of Data for Analysis	Conclusions / Results
Bonner, Hesford, Van der Stede and Young (2006) <i>AOS</i>	Summarize findings of studies that assess accounting journal quality. Investigate relative proportions of articles by area in top journals.			Concluded top 5 journal consensus. Relative proportions of articles by specialty area in top 5 not consistent with number of individuals working in these areas.
Buchheit, Collins and Reitenga (2002) <i>JAE</i>	Compare and contrast top-tier academic journal publications in four business disciplines.	Used the Trieschmann et al. (2000) classification system of top-tier journals for accounting, finance, management and marketing.	Data obtained from article counts from top-tier journals in these four disciplines during 1997 to 1999. Identified number of authors and affiliations of each author.	Accounting had significantly fewer top-tier articles published relative to other disciplines. A relatively higher percentage of accounting publications are associated with top 20 schools.

Table 1: Post -1999 Studies Assessing North American Accounting Journal Quality				
Study Reference (year)	Study Objective	Journal Quality Assessment Technique	Source of Data for Analysis	Conclusions / Results
Chow, Haddad, Singh and Wu (2007) <i>IAE</i>	Examined the association between article journal ranking and contribution to the literature.	Used nine accounting journals that routinely appear in the Social Science Citation Index. Specifically assessed the top 3 (JAE, TAR, JAR) contribution in terms of citations.	Obtained eight-year Social Science Citation Index citation counts for articles published in 1992, 1994, 1996 and 1997 in nine accounting journals.	Articles published in the top-three journals were cited more often than other journals but found that there were numerous classification errors when using journal ranking to proxy for journal contribution.
Christensen, Finger, and Latham (2002) <i>IAE</i>	Examined whether omission of non-accounting journals matters in assessing new faculty member accounting productivity during the first seven years of their careers.	Differentiated between publications in academic and practitioner journals based on primary readership. The study focused primarily on academic publications per accounting scholar.	Assessed publication counts for the first 7 years of accounting scholars' careers using the Accounting Literature Index through 1994. The study compared 1977/1978 graduates with 1987/1988 graduates.	Results suggested that 87/88 scholars published 1.97 total research articles per scholar when including non-accounting journals. Excluding non-accounting journals, scholars on average published 1.38 articles. The authors concluded that non-accounting journals are often a significant component in accounting scholarly output, and thus should not be ignored.
Christensen and Latham (2006) <i>AIT</i>	The study assessed the research productivity of tax scholars during the first seven years of their careers.	Classified articles based on tax, accounting, and non-accounting. Authors further differentiated articles as academic versus professional.	Assessed the publication counts of tax scholars who graduated in 1977/78; 1987/88; and 1993/94. Developed publication records using searches of ABI Inform, CCH Federal Tax articles, the Economic Literature Index, and the Social Science Citation Index.	Found that the mean number of professional and academic articles combined were 3.51 for 77/78 tax scholars; 5.87 for 87/88 scholars; and 4 for 93/94 scholars. Additionally, the percentages in academic journals increased from 38 to 42 to 47 percent for the three graduation periods studied.
Glover, Prawitt, and Wood (2006) <i>IAE</i>	Analyze publication records of faculty promoted from 1995 to 2003 at top-75 accounting research programs. The goal is to provide useful benchmarking data for faculty and administrators to assess publication records.	Used prior research to classify journals as (1) top-3; (2) top-6; (3) top-15; (4) top-25; (5) top-business, and (6) all other publications.	Tabulated research records of accounting scholars who were successfully promoted at the top-75 research universities. Per Treischmann et al., (2000).	The results suggest significant publication variation across the top-75 institutions (and related faculty) assessed.
Hasselback, Reinstein and Schwan (2000) <i>JAE</i>	Assess the quantity and quality of research productivity of accounting scholars who earned Ph.D.s from 1971 through 1993.	Used prior literature to assess over 100 journals. The main benchmarking output resulted in a list of the top-40 highest rated journals.	Reported aggregate research of 3,678 accounting faculty. Forty journals were used to assess publication quality.	The authors cite that this paper is the first to allow administrators to state a required number of articles for tenure or promotion using the eight journal-ranking benchmarks provided. The authors also noted that co-authorship increased over time.

<b>Table 1: Post -1999 Studies Assessing North American Accounting Journal Quality</b>				
<b>Study Reference (year)</b>	<b>Study Objective</b>	<b>Journal Quality Assessment Technique</b>	<b>Source of Data for Analysis</b>	<b>Conclusions / Results</b>
Herron and Hall (2005) <i>JAE</i>	Assess perceptions of accounting faculty regarding journal quality and publishing feasibility based on scholarship area as well as doctoral versus non-doctoral granting institution classification.	Asked respondents their quality and feasibility perceptions about 152 journals.	Emailed U.S. tenure track accounting faculty at AACSB schools in 2003 to assess journal quality and feasibility perceptions based on each identified scholarship area.	Concluded that area-specific journal ratings are superior to more generalized article benchmarks. Listings of the top-20 journals in each of nine scholarship areas were found to have little relationship with overall top-20 listed journals.
Johnson, Reckers and Solomon (2002) <i>AAJ</i>	Provide reliable aggregate and disaggregated journal quality benchmarks to help assess research quantity and quality for the promotion and tenure process.	Subjects were provided a list of 33 journals that prior literature had suggested maybe considered class "A" journals.	Administrators of accounting programs were asked to assess the quality (e.g., "A" versus "B") of a list of journals provided. Subjects were also asked to evaluate the number of "A" versus "B" journals need for promotion to associate professor.	Respondents from Ph.D. granting schools identified 7 class "A" journals. Respondents from comprehensive institutions identified 11 class "A" journals and undergraduate only institutions identified 18 such journals.
Lowensohn and Samelson (2006) <i>IAE</i>	Identify top-quality research publication outlets in five specialized areas of accounting based on perceptions of accounting faculty in these areas.	The authors used an open-ended response technique to query AAA members about the top research journals in their area of accounting specialty.	Authors surveyed AAA members in five specialized areas of accounting (behavioral, taxation, government and non-profit, managerial, and information systems) to identify quality journals in these areas.	Although most specialized areas of accounting have multiple quality outlets for research, many journals are relatively new and have been overlooked by previous research. Further, accounting academics in governmental and information systems may face difficulties substantiating the quality of their research.
Reinstein and Calderon (2006) <i>CPoA</i>	To assess journal rankings and other criteria used by doctoral- and non-doctoral granting institutions to assess scholarship for purposes of tenure and promotion.	The authors asked for the journal rankings that accounting departments actually used and did not suggest any ranking within the survey.	The authors used an email survey to ask accounting departments for journal ranking documents used for promotion, tenure, merit and other purposes.	The results document journal rankings used by doctoral- and non-doctoral granting institutions and note differences between the two groups. The results also suggest a reasonable consensus regarding a set of elite journals that are consistent across schools surveyed. This may suggest that a select group of elite accounting programs define the parameters of scholarship value and quality, which may damage the scholarship of application, integration and teaching in accounting.

<b>Study Reference (year)</b>	<b>Study Objective</b>	<b>Journal Quality Assessment Technique</b>	<b>Source of Data for Analysis</b>	<b>Conclusions / Results</b>
Swanson (2004) <i>CAR</i>	To assess if quality publication disparity exists among business disciplines such as accounting, finance, management, and marketing.	Focused on the three or four top-tier publications in the fields of accounting, finance, management, and marketing.	Data is obtained from the number of research articles, authors and doctoral faculty from each of the four disciplines during the period 1980 to 1999.	The results suggest that across all journals, accounting has a much lower proportion of doctoral faculty publishing in major journals as compared to the other disciplines. Specifically, the proportion of doctoral faculty publishing a major article is 1.4 to 2.4 times greater in other business disciplines than in accounting.

The common argument for publishing in higher ranked journals is they are associated with higher quality articles that make greater contributions to the literature (Chow et al., 2007; Lowensohn and Samelson, 2006; Bonner et al., 2006; Reinstein and Calderon, 2006). Accounting faculty position announcements frequently invite applicants who will publish in quality outlets or state requirements that candidates must substantiate their ability to publish regularly in top academic venues (also see Lowensohn and Samelson, 2006). Unfortunately, the emphasis on three to five top-tier journals likely causes additional hurdles for academic accounting specialists in international, systems, governmental/not-for profit, and taxation, given that relatively few articles related to these specialties appear in elite venues (Bonner et al., 2006).

Lowensohn and Samelson (2006) and Herron and Hall (2005) also addressed accounting specialization issues (e.g., financial, audit, or tax) and both studies evaluate journal quality classified by specific accounting specialization. These manuscripts implicitly encourage accounting departments to evaluate faculty publications based on area of specialty as opposed to an isolated evaluation of whether or not the faculty member published in the top three or top five accounting journals. Furthermore, the American Accounting Association's (AAA) addition of new sectional journals in the sub-fields of public interest, emerging technologies, international, and legal tax research underscores the increased specialization in accounting research.

### **Inter-Discipline Differences in Research (Motivator 3)**

A related concern for accounting academicians is recent evidence suggesting that accounting scholars, particularly at institutions with significant research requirements, face greater difficulties in the T&P process compared to their finance, management, and marketing colleagues (e.g., Buchheit et al., 2002; Swanson 2004). For example, Buchheit et al. (2002) found that accounting has fewer top-tier publishing opportunities compared to finance, marketing, and management because of fewer accounting journals in this category combined with lower acceptance rates. In addition, the vast majority of articles published in top accounting journals are by academicians affiliated with only twenty elite institutions (Buchheit et al., 2002). Swanson (2004) found that the quantity of tenure-track faculty publishing in major journals is

between 1.4 and 2.4 times greater in the finance, management, and marketing disciplines compared to accounting.

In short, because administrators and faculty at business schools must make cross-discipline comparisons among departments, accounting faculty often are at a comparative disadvantage (Buchheit et al., 2002). These factors reinforce the importance of a ranked journal list for accounting faculty based on broad, external, non-political consensus opinions that are appropriate for the department's mission in order to minimize second-guessing about interdisciplinary publication rates by business school faculty during T&P deliberations. In addition to the ranked journal list, departments may consider establishing benchmarks for the quantity of publications necessary for T&P that incorporate appropriate weightings based on journal ranking as a proxy for quality (e.g., Johnson et al., 2002; Hasselback et al., 2000). The following discussion presents literature dealing with journal quality and quantity for T&P, as well as journal ranking lists and weightings that supports our model exemplar in the Appendix.

#### **Journal Quality and Quantity for T&P, Journal "Lists," and Weightings (Motivator 4)**

There is significant literature dealing with journal quality and quantity for T&P purposes. For example, Englebrecht et al. (1994) examined 584 accounting faculty promotions in 1987-89. This study found that an average of 3.70 articles were required for promotion to associate professor and 6.50 articles to full professor at non-doctoral degree granting institutions. The corresponding statistics for doctoral institutions were 7.20 and 13.80.

Read et al. (1998) studied the publication productivity of accounting faculty promoted to associate professor at AACSB-accredited schools during the period 1987-94. Only journals listed in the 1996 edition of the *Accounting Literature Index* were counted. The results of this study showed that the number of articles published for tenure and promotion to associate professor at public, non-doctoral granting institutions declined from 4.81 in 1987-88 to 4.03 in 1993-94. Hasselback et al. (2000) tracked faculty based on year of graduation and classified the number of publications in the "top-40" journals that each faculty member had published. Their results suggested that 39 percent of faculty had not published any articles in the "top-40," while 17 percent had published one, 10 percent had published two, and seven percent had published three "top-40" articles. Only 26 percent had published four or more in the "top-40," further suggesting the difficulty of doing so (Hasselback et al., 2000. p. 86).

Johnson et al. (2002) found that accounting faculty generally needed 1.53 publications in "A" journals and 3.82 publications in less than "A" journals to be successfully promoted to associate professor and granted tenure. When the authors disaggregated their results by institution (e.g., doctoral, comprehensive (masters), and undergraduate only), the results were even more revealing. On average, faculty needed 2.97 (doctoral), 1.19 (comprehensive) and .815 (undergraduate) "A" publications and 3.96 (doctoral), 4.18 (comprehensive) and 2.69

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(undergraduate) publications in other non-“A” journals for promotion and tenure (Johnson et al., 2002, p. 239).

Glover et al. (2006) assessed the publication quality and quantity of faculty promoted at the top 75 research schools in the U.S. Their results (p. 209) suggest that faculty at these top-tier schools publish on average about 7 to 10 articles for promotion to associate professor after 6 years. Assistant professors at these top schools also are required to publish in the top-5 accounting journals (*TAR*, *JAR*, *AOS*, *JAE*, *CAR*)<sup>2</sup> (Glover et al., 2006). In fact, Buchheit et al. (2002) found that a very high percentage of top-tier accounting publications were written by authors affiliated with top-20 academic institutions. In sum, the findings of Glover et al. (2006) and Buchheit et al. (2002) provide further support that requiring top-5 accounting publications is appropriate for assistant professors at top doctoral programs but is likely inappropriate for such persons employed by most non-doctoral accounting schools.

Christensen et al. (2002) studied the publication rates of accounting faculty in both accounting and non-accounting journals during their first seven years of employment. Their results suggested that 1987/88 graduates published an average of 1.95 research (non-practitioner) articles during their first seven years of employment, and 1.38 articles were accounting in nature. When practitioner articles are included, faculty at doctoral granting institutions published an average of 4.16 articles during their first 7 years, while faculty at non-doctoral granting schools published three articles (Christensen et al., 2002, p. 241).

Hasselback and Reinstein (1995) updated these surveys to provide a weighted-quality for the most research-active departments. The results of Hull and Wright (1990) influenced our assigned weightings because they differentiated the responses of accredited versus non-accredited institutions. The top journal, *Journal of Accounting Research*, received a weighting of 2.43 and the tenth rated journal, *Management Science*, a weighting of 1.34. The average weighting of the top ten journals was 1.53.

Hasselback et al. (2000, p. 85) updated the weighting scheme in their previous related article, proposing a weight of 2.25 for both *TAR* and *JAR*. Chung et al. (1992) reported that the top ten percent of authors (measured by number of publications) in 14 respected accounting journals from 1968-88 accounts for nearly 40 percent of all published articles; the top 30 percent of authors account for 66.3 percent. These statistics are indicative of the difficulty in getting an article accepted by these journals and further supports greater weighting for articles published in top-quality publication outlets.

Despite the quantity of articles concerned with journal quality and rankings, there is little evidence about the application of this research to T&P decisions. We identified only two articles directly concerned with this issue. Reinstein and Calderon (2006) and Walker et al. (2010) investigated the incidence of journal lists used for T&P decisions while Walker et al. (2010) also collected information concerning the existence of accounting-specific, documented research standards for use in T&P decisions. Reinstein and Calderon (2006) and Walker et al. (2010)

found that 87% and 91%, respectively, of their respondents did not use formal journal rankings. The results of these studies support the notion that research standards are vague.

### **Linkages Between Research Productivity, Teaching, and Service Responsibilities at UW (Motivator 5)**

The American Association of University Professors (AAUP) established guidelines that universities should follow if they are to encourage optimum academic performance from professors and attract quality faculty. The AAUP's Statement on Faculty Workload With Interpretive Comments sets forth guidance on teaching workloads. It (1) defines the "maximum teaching loads for effective instruction at the undergraduate . . . level" as a "teaching load of twelve hours per week, with no more than six separate course preparations during the academic year," and "[f]or instruction partly or entirely at the graduate level, a teaching load of nine hours per week, based on an academic year of not more than 30 weeks of classes" (Simpson, 2006. p. 70).

The AAUP observes that the majority of institutions "noted for the effectiveness of their faculties in teaching and scholarship" allow adjustments for "heavier-than-normal duties in counseling, program development, administration, research, and many other activities" (Simpson, 2006. p. 70).

Faculty workload regulations of the University of Wyoming are consistent with AAUP guidelines and state that the standard teaching responsibility for full-time University of Wyoming (UW) faculty is twelve credits per semester for faculty while assigned exclusively to undergraduate teaching. Teaching workload is nine credits per semester for faculty whose responsibilities include research, creative activities, extension, service, or administration. In addition, the teaching responsibility may vary depending upon the nature and significance of the teaching, research, creative activities, service, or administration. Established annual University evaluation procedures are used to determine each faculty member's responsibilities with respect to the standard workload. These procedures include annual faculty updates and written assessments by department heads and directors as well as deans' written evaluations. All adjustments must conform to written guidelines developed and approved by the respective departments and colleges. These guidelines are subject to review and ratification by the appropriate dean and the University Workload Committee. Consistent with existing procedures and policies, department heads and program directors along with their dean have the responsibility to ensure that the allocation of responsibilities for teaching, research, creative activities, extension, and service in each faculty member's workload is consistent with this policy averaged over a two-year period. Due to relatively recent emphasis on research in the UW college of business, research-active tenure track faculty generally teach 6 semester credits a semester (12 for the academic year).

## THE AACSB'S IMPACT OF RESEARCH REPORT AND IMPLICATIONS FOR JOURNAL LISTS

In this section, we review implications of a recent report commissioned by the AACSB International that discusses ways to improve the perception of business school research inside and outside of business schools. The report contains a number of recommendations that, if adopted, could affect the incidence and content of journal lists at its member schools.

In 2008, the AACSB International released the Final Report of the *Impact of Research Task Force* (AACSB International, 2008). The AACSB International charged the Task Force with recommending ways to increase the overall value and visibility of business school research. The Task Force stated that business schools have difficulty responding to criticisms that faculty research is “disconnected” from business practice because of policies that emphasize counting articles and favoring basic research over contributions to practice and teaching.

Among the study's recommendations are for the AACSB to encourage efforts to create incentives for a greater variety of faculty intellectual contributions, recognize and publicize high-impact research by faculty, and strengthen interactions between academics and practicing managers in the production of knowledge in areas of great interest. However, as the report mentions, the incentives for business schools are to achieve *academic* legitimacy, which leads to more resources within their institutions. Business schools generally accomplish academic legitimacy by investing in prestigious academic research. As a result, the incentives dictate that faculty publish theoretically and methodologically sophisticated research in discipline-based academic journals such as those that dominate accounting journal rankings. However, publishing in these journals may not be consistent with the missions of many institutions.

In order to encourage member institutions to focus on the impacts of faculty scholarship, the Task Force recommended extension and augmentation of accreditation guidelines to require schools to institute policies for intellectual contributions consistent with their missions. This would require them to demonstrate the impact of scholarship on the audiences identified as important to each school. This recommendation suggests a “reorientation” of faculty incentives concerning scholarship to areas mentioned by the Task Force including those of broad, practical interest to the business community, interdisciplinary work (not discipline based), journal outlets that may not be peer-reviewed (such as *Harvard Business Review*), and learning and pedagogical research. The Task Force report supports this recommendation by presenting four models of scholarship emphasis for schools with different missions ranging from non-doctoral, teaching-oriented to large, doctoral, research-focused business schools.

## POLICY DEVELOPMENT PROCESS AND OUTCOMES

Our written policy appears in the Appendix. We address issues such as journal rankings and quality, weightings, and publication quantities that are often tied to teaching workload assignments. In order to make the research standards useful to a variety of institutions, we present two journal lists tailored to 1) non-doctoral accounting schools; and 2) non-elite doctoral granting schools<sup>3</sup>. Our own list is very consistent with the list in Appendix Table 1 with minor modifications.

As a precursor to developing our ranked journal list, we performed a literature review appearing in Table 1. We relied on this substantial body of literature concerned with rankings of accounting journals and adapted it to our academic environment. We based our journal list on three relatively recent studies, including Hasselback et al. (2000), Reinstein and Calderon (2006), and Glover et al. (2006). This approach was our attempt to write an objective policy based on a review of the current literature and to mitigate personal biases and political maneuvering. For example, the authors' anecdotal experience developing our department's journal list as well as experiences we have heard from colleagues at other institutions suggests that these lists may reflect only the views of the most influential members of the department. Using consensus-based lists such as those in Appendix Tables 1 and 2 may lessen this bias and increase credibility of the policy among non-accounting colleagues.

Our model in the Appendix attempts to capture realistic, relative quality differences using a weighting procedure (based on perceived publication difficulty) representing the amount of effort and reward that department chairs and administrators might attribute to publications in each category of journals. For example, if one considers the number of papers published each year in the top five journals (representing the smallest number of journals in any category), the journals' acceptance rates, the affiliations of editorial board members, etc., then the difficulty of getting an article accepted in one of these journals, versus those in subsequent categories, becomes apparent. Therefore, it may not be realistic for many institutions without doctoral programs to expect faculty to publish in these outlets. For example, the mean ranking of the categories of ranked journals in Appendix Table 2 (for doctoral granting schools) are as follows: A = 3.3; A- = 11.3; B+ = 19.9, with lower means reflecting higher rankings and publication difficulty. These numbers may represent a reasonable measure of the relative difficulty of publishing in each category of journals and useful for determining a system of points for publishing in these various categories of journals. Stated another way, it is about 3.4 times more difficult to publish in A versus A- journals (e.g., 11.3/3.3); and 1.8 times more difficult to publish in A- versus B+ journals (e.g., 19.9/11.3).

These relationships gave rise to our doctoral-granting department point awards of 4 points for publications in A journals, 2 points for A- journals, 1 point for B+ journals, and ½ point for all other publications (see Appendix Table 2). For purposes of our model exemplar in

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the Appendix, we feel justified in suggesting a top weight of 6 for “top-5” journals for faculty at non-doctoral granting schools (4 for doctoral granting schools), given the greater difficulty of publishing in these elite journals as compared with the A- category<sup>4</sup>. While the relative point awards are not exactly the same as the relative mean rankings, we were mindful of the situation where an individual could publish in a top-tier journal and essentially complete the research requirements for tenure and promotion.

We spent significant time developing the categories and point awards for our ranked journal list. Our desire was to achieve an appropriate balance that suitably rewards publications in top journals while maintaining reasonable incentives for faculty to continue active research agendas. During deliberations of the journal list and rankings by our department, some faculty members expressed concerns about the presence or absence of specific journals appearing on the list and their placement. At times the discussion was emotional. As one might expect, individuals wished the journals they publish in to be highly ranked. In addition, there were concerns about newer journals not on our list and journals outside of “mainstream” accounting.

In both cases, a series of faculty meetings served to alleviate faculty concerns and resulted in slight modifications to the list and establishment of procedures to enact future modifications. For example, we set up a sub-committee to evaluate faculty petitions to add or re-rank journals, including non-accounting journals. Two accounting department faculty are ethics researchers, so they petitioned to add and rank the *Journal of Business Ethics*. This process unfortunately became somewhat controversial because the college of business associate dean ranked the journal lower than did the department committee.

Academic Affairs was concerned about the level of detail in our policy (the use of lists and a point system) and the potential for individuals to believe that achieving the standard would guarantee tenure and/or promotion. In response, we pointed out the extensive literature supporting the rankings, the flexibility of our policy in accommodating new journals and variations in research interests, and the necessary-but-not-sufficient clause, which says that meeting the objective criteria does not guarantee promotion and/or tenure.

After considerable debate, the UW accounting department approved our policy document in 2006. Overall, members of our department have been satisfied with the policy and there have not been any serious objections since it was adopted. When we began this process in 2005, one faculty member was a first-year assistant professor and another associate professor was also in their first year. We have hired one new assistant professor since we adopted the policy. All three individuals express satisfaction with the clarity of the requirements – they know exactly what they need to do, and why, in order to satisfy the department’s criteria for research. Individuals also know how their research productivity impacts on their teaching and service responsibilities. Other individuals whom we interviewed for positions in our department, after reading the policy, expressed similar views.

## CONCLUSIONS AND RECOMMENDATIONS

In summary, we concluded that there should be five major components to an acceptable department policy for research; 1) reliance on published literature, 2) fit with mission characteristics of our department and programs, in consideration of college expectations and our position as an AACSB accredited college in a Carnegie Doctoral/Research University—Extensive institution, 3) clear linkages between research productivity and teaching and service workloads, 4) a procedure for modifying journal quality lists, 5) acceptance of our standards by college and university administrators.

Accountants in practice and in academia are fundamentally concerned with quantifying, measuring, and evaluating performance in many arenas. Consistent with this behavior, accounting academics have repeatedly studied perceptions of journal quality, as we previously reviewed. The quantity and consistency of findings in this stream of research support the legitimacy of using a journal list and suggests that this information should be useful to academic accounting units for making T&P decisions. However, anecdotal evidence suggests that most accounting departments do not have well-defined T&P standards in general, and fewer still incorporate journal rankings into their standards.

We suggest that our general approach to removing some ambiguity from the T&P process is worthy of consideration – final policy statements will vary greatly depending on specific business college environmental factors. A number of factors supported our efforts. First, documentation of research standards is encouraged by the AACSB and serves to provide objective standards and improve communication with faculty concerning the T&P process. Second, mission-specific journal lists establish incentives for faculty research that are aligned with school missions. Third, a consensus-based, explicit policy should also help accounting administrators defend their faculty research activities in debate with colleagues from other disciplines during T&P deliberations. Fourth, a documented policy for research provides a rational basis for assignment of workload distributions for teaching and service. Finally, the act of developing such a policy may help accounting departments explicitly articulate the faculty's desired research culture.

We encourage accounting departments to develop their own journal lists, perhaps using Appendix Tables 1 and 2 as a starting point. Faculty may wish to correct for specialization bias (e.g., financial, governmental, and tax) that is discussed in the recent literature (e.g., Lowensohn and Samelson, 2006; Herron and Hall, 2005).

We note areas where faculties at other institutions are likely to deviate from our exemplar. First, our assignment of points to identified categories of journals in Appendix Tables 1 and 2, as well as our assignment of points to the classification of research as “active,” “very active,” and “highly active,” though not arbitrary for our case, may not be suitable elsewhere. However, we attempted to justify these judgments based on the literature. One alternative to the

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points system is to require a certain number of journal articles in identified quality categories. Our model policy in the Appendix illustrates this, by stating that a predetermined number of articles must be from a certain quality category (A versus A-, and so on) for promotion and tenure that differs based on whether the school is doctoral granting or not. Alternatively, departments might categorize the articles according to readership such as business practitioners or educators.

We do not offer our policy exemplar and associated lists in the Appendix as a cure-all for the inherent uncertainties that exist in the T&P process. Like any set of guidelines or directives, negative outcomes may result. Some faculty may attempt to “game the system,” and thus thwart its intent. We also encourage departments to augment written policies with a formal mentoring system that encourages creativity activities consistent with department values. Teaching effectiveness and collegiality may be an important factor in T&P decisions. Therefore, from an administrative standpoint, the essential statement for inclusion in any T&P policy concerning research is that “*achievement of a research standard is a necessary but not sufficient condition to achieve the award of tenure or promotion.*”

A limitation of our model is that we consider only accounting journals in our exemplar. Christensen et al. (2002) concisely notes that many accounting faculty are now publishing in non-accounting journals, and we do not consider these journals in our ranked journal lists. However, we also note that a recent study of business journal citations shows that accounting has a significant inward focus and appears headed towards a type of institutional isolation (Biehl et al., 2006). Thus, an accounting-only journal list is not likely to present a significant problem for most departments. In our case, the ability to petition to add new journals or adjust rankings helps alleviate this concern. Finally, this study only evaluated accounting journals that are well-established. Therefore, we did not attempt to rank newer journals such as AAA section journals in the areas of the public interest, emerging technologies, international, and legal tax research. This is a task best addressed department-by-department.

If the AACSB adopts the recommendations of the Impact of Research Task Force, then we may need to conduct future research that will lead to new lists that also rank professional and trade journals and magazines and instructional and learning-oriented journals independently of those that include peer-reviewed, discipline-based journals. As part of this effort, we may need to expand formally the scope of journals for consideration beyond the domain of accounting to include other areas of business and education.

## ENDNOTES

<sup>1</sup> <http://gseacademic.harvard.edu/~coache/reports/20070917.html>

<sup>2</sup> Where TAR = *The Accounting Review*; JAR = *Journal of Accounting Research*; AOS = *Accounting, Organizations and Society*; JAE = *Journal of Accounting and Economics*; and CAR = *Contemporary Accounting Research*.

<sup>3</sup> We consider doctoral schools ranked in the top-30 as elite for our purposes.

<sup>4</sup> We feel justified suggesting a greater number of points for “top 5” publications for faculty at non-doctoral granting schools relative to faculty at doctoral-granting schools for a number of reasons. For example, faculty at doctoral granting schools often benefit from lower teaching loads and often have access to research assistants who are doctoral students.

<sup>5</sup> This standard is reasonably consistent with the findings of Glover, et al. (2006. pp. 206 and 208), but likely will need adjustment (either up or down) depending on the overall rank of the doctoral school in question. Indeed, elite doctoral programs may still limit acceptable publications to the “top-5” only, despite the hardship this causes faculty specializing in tax, systems, governmental, and international.

<sup>6</sup> These point assignments are inherently arbitrary, but represent a good faith attempt to tie to the weightings in Appendix Tables 1 and 2. We suggest no point differential for NDGS and DGS faculty in the “active” scholarship category because an 18 credit per year teaching load does not inherently warrant point differences at this level of scholarship, especially since anecdotal evidence suggests that such faculty may be targeting journals worth only ½ point. We do suggest point differences in the other two categories because we perceive likely target journal differences between NDGS and DGS at this level of scholarship productivity. One should also note that anecdotal evidence suggests that 12 credit teaching loads at NDGS are relatively rare, but are common at DGS. Also, points for “highly active” scholarship are purposefully set at an amount lower than that required for promotion and tenure. We argue this is appropriate given that most promoted faculty generally take on additional faculty mentoring roles as well as committee assignments. Finally, this scheme assumes a “traditional” scholarship mission. If a department has a mission to contribute to practice and pedagogical research instead of discipline-based research, then this scheme requires adjustment to encourage desired behaviors.

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## APPENDIX

**EXEMPLAR: DEPARTMENT OF ACCOUNTING RESEARCH PRODUCTIVITY  
POLICY FOR TENURE, PROMOTION, AND TEACHING WORKLOAD  
ASSIGNMENTS**

The American Association of University Professors (AAUP) recognizes 24 semester hours of teaching as the standard workload for a full-time, tenure-track faculty member. The university views scholarly activities as valuable and integral to the university's overall mission. As such, the university's workload policy allows for a reduction in a faculty member's teaching load to a minimum of six hours per semester for research that is highly regarded as far as quality and quantity in the faculty member's discipline.

In order to promote academic research, newly appointed faculty at the assistant professor rank will be granted a 12 credit-hour teaching load for each of their first five years and during this probationary period must achieve a total of 7 research points for non-doctoral granting schools (hereafter NDGS) and 12 research points for doctoral granting schools (hereafter DGS) in order to meet the necessary but not sufficient research standard for tenure and promotion to associate professor. Furthermore, research points must include at least one publications in a journal listed as "A-" (or higher—see Appendix Table 1) for faculty at NDGS (four for faculty at DGS—see Appendix Table 2) and no more than 2 points may be earned from paper presentations and/or proceedings publications<sup>5</sup>. Commencing in the sixth year, the teaching and service workloads will be based on progress toward meeting the goal of achieving the research standard, as determined by the Department Chair during the reappointment process. Full credit will be awarded for multiple-authored works with up to three co-authors; half-credit for co-authors in excess of three. At least one paper must be single-authored.

<b>Appendix Table 1: Suggested Ranked Journal List – Non Doctoral Granting Schools (NDGS)</b>					
Rank	Journal	R&C <sup>1</sup>	GP&W <sup>2</sup>	HR&S <sup>3</sup>	Mean
<b>Top 5 "A+" Journals (6 points Each)</b>					
1	The Accounting Review	1	2	1	1.3
2	Journal of Accounting Research	2	2	1	1.7
3	Journal of Accounting and Economics	3	2	3	2.7
4	Contemporary Accounting Research	4	5	5.5	4.8
5	Accounting, Organizations and Society	7	5	5.5	5.8
<b>"A" Journals (4 points each)</b>					
6	Journal of the American Taxation Association	5	11	5.5	7.2
7	Journal of Accounting, Auditing, and Finance	10	11	5.5	8.8
8	Auditing: A Journal of Practice and Theory	6	11	10.5	9.2
9	Review of Accounting Studies	16	5	n/a	10.5
10	Journal of Accounting and Public Policy	12	11	10.5	11.2
11	Behavioral Research in Accounting	9	11	15.5	11.8
12	National Tax Journal	15	11	10.5	12.2
13	Journal of Management Accounting Research	8	20.5	10.5	13.0
14	Accounting Horizons	13	11	19.5	14.5
15	Journal of Accounting Literature	18	11	15.5	14.8
<b>"A-" Journals (2 points each)</b>					
16	Journal of Business Finance and Accounting	25	11	10.5	15.5
17	Issues in Accounting Education	14	20.5	19.5	18.0
18	Abacus	18	20.5	15.5	18.0
19	The Journal of Accountancy	17	n/a	19.5	18.3
20	Journal of Information Systems	11	20.5	27.5	19.7
21	Journal of Accounting Education	20	20.5	19.5	20.0
22	Accounting & Business Research	27	20.5	15.5	21.0
23	International Journal of Accounting	21	n/a	23	22.0

Rank	Journal	R&C <sup>1</sup>	GP&W <sup>2</sup>	HR&S <sup>3</sup>	Mean
24	Advances in Accounting	26	20.5	23	23.2
25	Research in Governmental and Nonprofit Acct.	22	20.5	27.5	23.3
<b>“B+” Journals (1 point each)</b>					
26	Journal of Taxation	37	n/a	10.5	23.8
27	CPA Journal	23	n/a	32.5	27.8
28	International Journal of Acct. Info. Sys.	28	n/a	n/a	28.0
29	Tax Adviser	28	n/a	n/a	28.0
30	Advances in Taxation	38	20.5	27.5	28.7
31	Advances in International Accounting	31	n/a	27.5	29.3
32	Taxes, the Tax Magazine	30	n/a	n/a	30.0
33	Research in Accounting Regulation	34	n/a	27.5	30.8
34	Management Accounting (now Strategic Finance)	32	n/a	32.5	32.3
35	Accounting and Finance	n	n/a	32.5	32.5
36	Accounting Educator's Journal	33	n/a	32.5	32.8
37	Accounting, Auditing, and Accountability	48	n/a	19.5	33.8
38	Critical Perspectives on Accounting	41	n/a	27.5	34.8
39	Journal of Int. Acct., Auditing and Taxation	35	n/a	n/a	35.0
40	Journal of Accounting, Economics and Finance	36	n/a	n/a	36.0

Rank: <sup>1</sup>R&C = Reinstein & Calderon (2006); <sup>2</sup>GP&W = Glover et al. (2006); <sup>3</sup>HR&S = Hasselback et al. (2000)

Rank	Journal	R&C <sup>1</sup>	GP&W <sup>2</sup>	HR&S <sup>3</sup>	Mean
<b>Top 5 “A” Journals (4 points Each)</b>					
1	The Accounting Review	1	2	1	1.3
2	Journal of Accounting Research	2	2	1	1.7
3	Journal of Accounting and Economics	3	2	3	2.7
4	Contemporary Accounting Research	4	5	5.5	4.8
5	Accounting, Organizations and Society	7	5	5.5	5.8
<b>“A-” Journals (2 points each)</b>					
6	Journal of the American Taxation Association	5	11	5.5	7.2
7	Journal of Accounting, Auditing, and Finance	10	11	5.5	8.8
8	Auditing: A Journal of Practice and Theory	6	11	10.5	9.2
9	Review of Accounting Studies	16	5	n/a	10.5
10	Journal of Accounting and Public Policy	12	11	10.5	11.2
11	Behavioral Research in Accounting	9	11	15.5	11.8
12	National Tax Journal	15	11	10.5	12.2
13	Journal of Management Accounting Research	8	20.5	10.5	13.0
14	Accounting Horizons	13	11	19.5	14.5
15	Journal of Accounting Literature	18	11	15.5	14.8
<b>“B+” Journals (1 point each)</b>					
16	Journal of Business Finance and Accounting	25	11	10.5	15.5
17	Issues in Accounting Education	14	20.5	19.5	18.0
18	Abacus	18	20.5	15.5	18.0
19	The Journal of Accountancy	17	n/a	19.5	18.3
20	Journal of Information Systems	11	20.5	27.5	19.7
21	Journal of Accounting Education	20	20.5	19.5	20.0
22	Accounting & Business Research	27	20.5	15.5	21.0
23	International Journal of Accounting	21	n/a	23	22.0
24	Advances in Accounting	26	20.5	23	23.7
25	Research in Governmental and Nonprofit Acct.	22	20.5	27.5	23.3

Rank: <sup>1</sup>R&C = Reinstein & Calderon (2006); <sup>2</sup>GP&W = Glover et al. (2006); <sup>3</sup>HR&S = Hasselback et al. (2000)

Associate professors at NDGS must earn an additional 7 points for promotion to full professor (12 points for DGS), and research points must include at least one publication in journals listed as “A-” (or higher) for faculty

at NDGS (four for DGS faculty) and again no more than 2 points may be earned from paper presentations and/or proceedings publications.

In general, faculty appointed at the associate and full professor ranks will be assigned teaching loads on the basis of the classifications of research activity defined below. Exceptions will be granted to individuals on administrative appointments, high service assignments, or based on other extenuating circumstances as determined by the department chair.

### RESEARCH PRODUCTIVITY POLICY SUMMARY

In light of the guidelines set by the university's workload policy, the department of accounting will allow a reduction in teaching load for significant scholarly activity as follows<sup>6</sup>

- A. Active Researcher: Two research points during the most recent 5 years (for both NDGS and DGS faculty). Teaching reduced from 24 to 18 credits per academic year.
- B. Very Active Researcher: Four research points during the most recent 5 years for NDGS faculty (5 for DGS faculty). Teaching reduced from 24 to 15 credits per academic year.
- C. Highly Active Researcher: Six research points during the most recent 5 years for NDGS faculty (9 for DGS faculty). Teaching reduced from 24 to 12 credits per academic year.

Research points will be awarded as follows:

Journals rated as "A+" (for NDGS only)	6 points
Journals rated as "A"	4 points
Journals rated as "A-"	2 points
Journals rated as "B+"	1 point
All other journals	0.5 point
Paper presentations and/or proceedings publications (maximum of 2 points in a 5-year period)	0.5 point
Books, book chapters, funded research proposals, monographs, and other quality professional projects	0.5-2 points

We used four studies concerned with publication activity of promoted accounting faculty (Campbell and Morgan, 1987; Milne and Vent, 1987; Englebrecht et al., 1994; Read et al., 1998) to establish standards for the "active," "very active," and "highly active" categories. Although the number of articles published for promotion in these studies may not equate precisely to the publication activity for workload reduction outlined in this policy statement, we contend the results of these studies provide a sound basis for establishing workload reduction criteria.

For the purposes of determining quality, the department will rely on published rankings of accounting and accounting-related journals and evaluations of publication outlets from respected institutions. Three relatively recent examples of ratings are found in Hasselback et al. (2000), Reinstein and Calderon (2006), and Glover et al. (2006). This department triangulates these three lists into one comprehensive ranked list (Appendix Table 1 for NDGS and Appendix Table 2 for DGS). These lists may be augmented with top quality specialty area (e.g., tax, audit, or systems) journals as suggested by Lowensohn and Samelson (2006) and Herron and Hall (2005).

### POLICY RATIONALE

#### Background Discussion

The AACSB guideline for intellectual contributions (Section 2, no. 2) states that the mission of the school should be consistent with the mission of the institution and include the production of intellectual contributions that advance the knowledge and practice of business management. As a result, there is considerable latitude concerning

how achievement of this requirement may be satisfied. Components of intellectual contributions and examples of each are:

1. Learning and pedagogical research. These are contributions that influence the teaching-learning activities of the school, e.g. textbooks, publications in pedagogical journals, and case materials.
2. Contributions to practice. These are works that influence professional practice, such as publications in professional journals, professional presentations, and executive education courses, etc.
3. Discipline-based research. These are contributions that add to the theory or knowledge base of the field.

Examples may include publications in refereed academic journals, research monographs, paper presentations, etc.

The basis for judgment of intellectual contributions for accreditation purposes is the portfolio of the faculty's output supporting the school's mission over a five-year period. The standard does not contain any numerical guidelines for sufficiency of intellectual contributions, only that there is demonstrated consistency of output consistent with mission.

The standard adopted by the department for faculty to be classified as conducting "active research" (2 research points during the past five years) is consistent with the department's mission, indicative of faculty efforts in intellectual contribution sufficient to warrant a reduction in teaching responsibilities to 18 semester hours per year, and sufficient to support the college's accreditation. The results of cited studies of accounting faculty research productivity also support this conclusion. *It is further understood by the faculty that satisfying the minimal requirement for a teaching load reduction is not, taken alone, a guarantee of satisfying reappointment, promotion, or tenure requirements.*

The faculty research policy for the department of accounting is based on (1) the missions of the university and college of business, (2) results of studies of accounting faculty publication productivity, (3) the AACSB Accreditation Standards for intellectual contributions, and (4) criteria that reflect the department's aspirations for recognition in the educational community. We contend it is important for our long-term success to establish research standards that are consistent with prevailing workload allocations, may be reasonably achieved, support quality outcomes, and encourage intellectual contributions by all faculty members.

### **Suggested Ranked Journal Lists**

Based on a detailed review of literature concerned with journal quality and quantity standards for tenure and promotion, a list of ranked journals that might be used for evaluating faculty research performance consistent with the points system discussed earlier appears in Appendix Table 1 (for NDGS faculty) and Appendix Table 2 (for DGS faculty).

In summary, based on evidence from studies of research productivity by accounting faculty a reasonable number of total publications for promotion to associate and full professor is about 4 and 7, respectively. The research productivity expectations outlined in our workload policy for reduced teaching loads of 2 research points for "active" (18 semester hours), 4 research points for "very active" (15 semester hours) NDGS faculty (5 for DGS faculty), and 6 points for "highly active" (12 semester hours) NDGS faculty (9 for DGS faculty) over a 5-year period. These standards are reasonably consistent with the literature, AACSB accreditation guidelines, and reasonable expectations for our department considering prevailing teaching loads, desire to improve research productivity, and efforts to produce policies with motivational benefits.

