

INTEGRATING STRATEGIC PLANNING, BUDGETING, AND OUTCOMES ASSESSMENT IN CHRISTIAN BUSINESS EDUCATION

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Abstract

In this paper, we present a model for strategic planning that integrates budgeting and outcomes assessment with the strategic planning process, resulting in one coherent process that includes strategic planning, budgeting, and outcomes assessment. The paper examines the challenges and frustrations commonly associated with strategic planning, budgeting, and outcomes assessment; details a process for strategic planning and continuous quality improvement, including extensive material on budgeting and outcomes assessment; examines institutional differences that impact the strategic planning process; and suggests ways to lead organizational change that improve the linkages among strategic planning, budgeting, and outcomes assessment.

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Introduction

By necessity, virtually every institution of higher education has a budget and a budgeting process—and has for many years. Although the effectiveness of budgeting processes varies among institutions, invariably a process does exist. Most institutions of higher education also have a strategic plan and a strategic planning process. Once again, the effectiveness of the process may vary, but a process does exist.

Consistent with increasing demands for accountability in education, many educational institutions now have an outcomes assessment plan or a process for assessing the effectiveness of the institution and/or its subunits. Prior to the 1990s, both institutional and specialized accrediting bodies focused much of their attention on measuring the resources or inputs of an institution to evaluate educational quality. These inputs included such things as faculty teaching loads, faculty credentials and qualifications, and faculty deployment. In the last decade, quality measurement has shifted to a large extent from inputs to outcomes. It is not just the quality of the institution that is being examined—it is the institution's effectiveness and the effectiveness of its component parts. Most regional accrediting bodies now require institutions to have an outcomes assessment plan, to implement the plan, and to integrate outcomes assessment with the institution's planning and budgeting processes.

Because the requirement for outcomes assessment is more recent, in many cases an institution's outcomes assessment process will be in an early stage of development. Many institutions, therefore, will have budgeting, strategic planning, and outcomes assessment processes in place—but few will have them well integrated with each other. This lack of integration often causes frustrations throughout the organizations and its stakeholders. It may also result in suboptimal performance for the institution. Integrating strategic planning, budgeting, and outcomes assessment for the institution, therefore, should contribute to greater institutional effectiveness through improved performance, morale, job satisfaction, and organizational commitment.

In this paper, we present a model for strategic planning that integrates budgeting and outcomes assessment with the strategic planning process, resulting in one coherent process that includes strategic planning, budgeting, and outcomes assessment. We believe that an integrated strategic management process has the potential to increase the institution's efficiency and effectiveness; enhance cooperation, communication, collaboration, and participation in decision-making; provide clear linkages among strategic planning, budgeting, and outcomes assessment; allow for strategy-driven budgeting; and provide increased assurance of quality for stakeholders. As stated by Farmer (1998), "excellence in education does not occur accidentally—it is the result of a pursuit that requires careful planning and implementation, and it cannot grow unattended."

This paper is organized as follows. Following the introduction, the first section examines the challenges and frustrations commonly associated with strategic planning, budgeting, and outcomes assessment. The next section of the paper details a process for

strategic planning and continuous quality improvement, including extensive material on budgeting and outcomes assessment. Institutional differences that impact the strategic planning process are also examined. The next section examines how to lead organizational change in a way that improves the linkages among strategic planning, budgeting, and outcomes assessment. The final section of the paper provides suggestions for future research and a conclusion.

We have written this paper primarily for business deans at Christian colleges and universities.¹ Most of our observations, however, apply equally to other sub-units of educational institutions, as well as to the institution as a whole.

Challenges

Several categories of frustrations are commonly found in educational institutions concerning strategic planning, budgeting, outcomes assessment, and their linkages. One category of frustrations relates to the processes themselves. For example, in an empirical study, business deans and chairs rated the importance of and their perceptions of reality on a number of characteristics of excellence in business education. The largest gap between importance and reality was in regard to the statement, “The institution provides adequate resources to the business unit to accomplish its mission and broad-based goals” (Roller, Bovee, Andrews, & Walenciak, 2002, p. 9). Another large gap was in regard to the statement, “The business unit has a strategic plan that is in touch with the realities of business education and the marketplace” (Roller et al., 2002, p. 9).

¹ We recognize that the academic business unit may be considered a department, division, school, or college; and may be headed up by a chair or dean (or some other title). For simplicity, throughout this paper we will refer to any of these sub-units as a “school of business” and the leader as a “dean.”

In a study of business deans and chairs at small- and medium-sized colleges and universities, the most significant frustration (noted by over 70 percent of the respondents) was insufficiency in resources and funding (Bovee, Roller, & Andrews, 2001). This category included such items as lack of money and resources, low budget levels, inadequate budget systems, and viewing the business program as a cash cow to support other programs. Respondents also strongly agreed that the business dean had too little input in the budget process. In the same study, the fourth most important issue was the respondents' frustrations with the strategic direction of their institution or that imposed on their business program. Respondents felt that top-level administration did not have a clear direction or was fragmented in its focus, which resulted in unclear strategic directions being dictated to the business school (Bovee et al., 2001).

A second category of frustrations with strategic planning, budgeting, and outcomes assessment has to do with differences between the organizational level and the departmental/division/school level. For example, the business school may have a different perspective of the competitive environment than the rest of the institution or its leadership. Because of training and/or perspective, the business faculty may be more entrepreneurial and market-oriented than the faculty members of other departments within the institution. On the other hand, the administration may be more entrepreneurial and market-oriented than the business faculty. In either case, the lens through which the competitive environment is viewed influences the content of the strategic plan, outcomes assessment plan, and budget.

Sometimes these differences are information-related. Some institutions are more open in their approach to full disclosure of financial and operational data; others are less

apt to disclose information. Where full information is not available, significant differences in the content of the strategic plan for the school of business and that of the organization are to be expected.

A third category of frustrations with strategic planning, outcomes assessment, and budgeting has to do with the linkages between the departmental and institutional levels of an organization. For example, sometimes incongruencies between the assumptions, mission, goals, and objectives of the business school and that of the organization may exist. Any time a unit of the organization has goals that are in conflict with or not synchronized with organizational goals, goal suboptimization occurs (Wheelen & Hunger, 2004). It is natural, however, for the leaders and members of organizational subunits, such as a school of business, to establish goals and objectives that are beneficial to their segment of the institution, regardless of whether or not those goals and objectives lead to goal accomplishment for the institution. Through integrating the strategic planning, outcomes assessment, and budgeting processes of the institution with those of its subunits, goal suboptimization can be reduced.

Another example of poor linkages is when school- or departmental-level strategic plans are poorly correlated with the institution's strategic plan. At some institutions, strategic plans are prepared both for the organization and its subunits, but there is no intentional correlation among them. In others, the results of departmental assessments do not feed back into the organization's strategic plan. For example, one study found a sizeable gap in regard to the linkages between outcomes assessment plans and strategic plans (Roller, Bovee, Andrews, and Walenciak, 2003). Or there may be little relationship between departmental and institutional assessments. For example, the organization will

collect assessment data, yet have no way to break it down by department. The data, therefore, is of little use to the department's decision making—yet may influence decisions that will affect the department. In other cases, department-level assessment results are not integrated into institutional assessment and planning, resulting in sub-optimal planning.

Another frustrating issue regarding strategic planning, outcomes assessment, and budgeting has to do with conflicting planning, assessment, and budgeting cycles for an institution. For example, assessment results may not be available until it is too late to use them in the budget development process. This tends to create sizeable lag times between when a need is identified through the outcomes assessment process and when funds are allocated in the budget development process to address the needs and priorities identified through assessment results.

Given the above issues and frustrations, what many educational institutions need is a process for strategic planning, outcomes assessment, and budgeting that is integrated, both within itself and among subunits of the organization. In the next section of the paper, we present such a model.

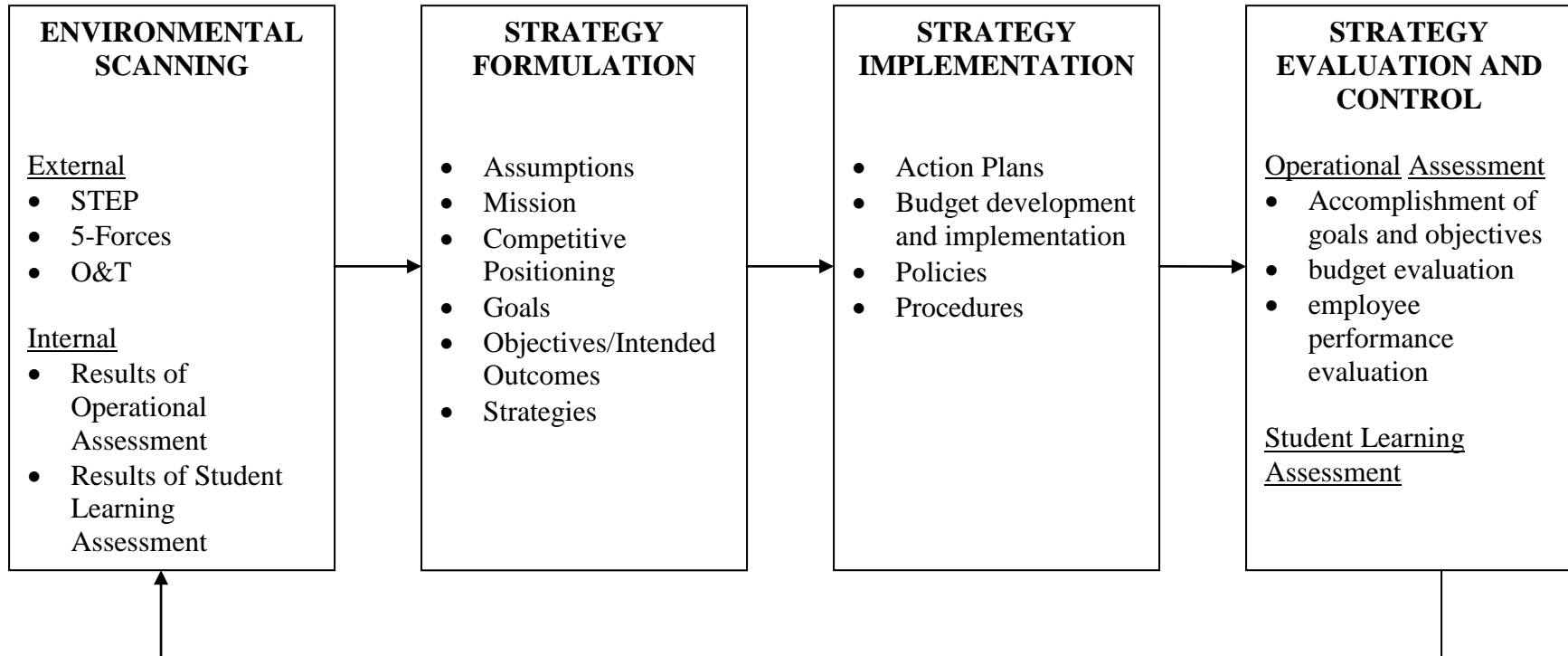
An Integrative Strategic Management Model

As mentioned earlier, one of the reasons for poor linkages among strategic planning, outcomes assessment, and budgeting is that each process is often perceived as, and implemented as, separate processes in organizations. Educational institutions and/or their departments may have strategic plans, outcomes assessment plans, and budgets that are totally separate documents with little integration. What is needed is a planning process that includes and integrates strategic planning, outcomes assessment, and

budgeting that results in one comprehensive planning document. A model for such a process is shown in Figure 1.

This model, which is similar to many of those used in Strategic Management textbooks (e.g., Wheelen & Hunger, 2004; Grant, 2002), highlights the four major phases of the strategic management process. The first phase is that of environmental scanning, which includes both an analysis of the institution's external environment and its internal environment. The second phase is the strategy formulation stage, the third is the strategy implementation phase, and the last is the strategy evaluation/control phase. The model demonstrates the process of strategic planning; when the process is followed and the results are put into written form, a strategic plan is developed. In the following sections, each of the four phases of the integrated strategic management model is explained.

Figure 1. An Integrative Strategic Management Model for Educational Institutions



Environmental Scanning

The starting point for strategic planning is scanning of the institution's external environment to recognize important opportunities and threats, and scanning the institution's internal environment to identify strengths, weaknesses, and sources or potential sources of competitive advantage. This scanning process should take place in each department, as well as for the organization as a whole.

External Environmental Scanning. Two types of analysis are conducted to scan the organization's external environment. The first involves scanning the organization's societal environment. Often this is accomplished using a STEP analysis, which involves analyzing the organization's sociological, technological, economic, and political environments. This process involves research into the key factors affecting the organization's external environment.

The second type of analysis used in external environmental scanning involves determining the nature of competition in the organization's competitive market. One useful tool for this analysis is Porter's model of forces affecting industry competition (Porter, 1988). In this model, five forces that affect industry competition are analyzed:

- The threat of new entrants into the industry(s) in which the organization competes
- The bargaining power of the industry's supplier groups
- The bargaining power of the industry's customer groups
- The threat of substitute products and/or services
- The intensity of rivalry within the industry

When the overall level of threat is high, as assessed using these five forces, then the level of competition in the industry is high, and substandard economic results can be expected,

on average, within the industry. Conversely, when the overall level of threat is low, above-average economic performance in the industry can be expected.²

Scanning the external environment using a STEP analysis and Porter's model of forces affecting industry competition results in a list of significant opportunities and threats facing the organization. These opportunities and threats become key inputs into the strategy formulation phase of the integrative strategic management model, particularly when examined in light of internal strengths and weaknesses.

Internal Environmental Scanning. The goal of internal environmental scanning is two-fold: to develop a list of the key internal strengths and weaknesses of the organization, and to assess the organization's sources of competitive advantage. Strengths and weaknesses are determined by analyzing each of the operational units of the organization. In educational institutions, this normally involves analyzing each department of the organization to determine strengths and weaknesses. It also involves examining the linkages among departments to determine to what extent goals that require interdepartmental cooperation are being accomplished.

The results of student outcomes assessment also should be key inputs into the internal environmental scanning process. Assessment of student learning focuses on assessing the degree to which educational objectives have or have not been met, and thus discovers key strengths and weaknesses related to student learning. Student outcomes assessment will be examined in more detail in the "Strategy Evaluation and Control" section of this paper.

² Note that this is an industry-level analysis. The performance of individual organizations may be either better or worse than the industry average. Individual organizations can take actions that insulate them, to some degree, from these threats, and thus perform better than the industry average.

Determining an organization's sources (or potential sources) of competitive advantage is another essential part of the internal environmental scanning process. An excellent tool for analyzing sources of competitive advantage is a VRIO analysis (Barney, 2002). The analysis starts with listing all of the key resources or competencies of the organization. Each resource or competency is then subjected to four tests; all four tests must be passed if the resource or competency is to be considered a source of competitive advantage. The four tests are in the form of questions:

- The **V**alue Question: is this resource or competency valuable to the organization?
- The **R**areness Question: is this resource or competency relatively rare among competing organizations?
- The **I**mitability Question: is this resource or competency difficult or expensive to imitate?
- The **O**rganization Question: is this resource or competency exploited by the organization?

If a resource or competency is determined, through this analysis, to be valuable, rare, difficult or costly to imitate, and exploited by the organization, then that resource or competency is a source of competitive advantage for that organization. An understanding of the organization's sources of competitive advantage becomes a critical input in the strategy formulation process.

Strategy Formulation

The second phase of the model is the strategy formulation phase. Strategy formulation attempts to position the organization within its competitive environment, and thus builds on the results of the environmental scanning phase. In this phase, appropriate

strategies to accomplish organizational goals are determined. There are several steps in this process.

Assumptions

The first step is to determine any assumptions that affect the strategic management process. For example, is the process dependent on any particular set of economic or political events? Or is it dependent on certain key individuals remaining with the institution? Some of these assumptions will have been identified through the analysis done in the environmental scanning phase of the process.

Mission

The second step is to determine or update the mission of the institution. According to the Middle States Commission on Higher Education (2003), “An institution’s mission, at both broad and special levels, serves as the context within which to assess student learning....it is important for the mission to serve as a backdrop for shaping: (1) the goals for student learning, and (2) the assessment efforts at the institution, department, and program levels.” An institution’s mission is typically developed by the faculty and administration and approved by the governing board. In contrast, the missions of an institution’s departments are typically prepared by the departments and approved by the administration. Each department’s mission should be congruent with the institution’s mission, and, collectively, should equate with the institution’s mission.

Many organizations have developed excellent mission statements that remain timely and appropriate. Others, however, do not have good mission statements—but do

need them. Everything that follows in the strategic plan must be based on and be consistent with the mission of the organization, therefore it is crucial to have a well-thought-out, timely, and relevant mission statement.

Goals

Following the mission statement, the organization's broad-based goals should be determined and listed. We are using the term "goal" here to indicate a general statement of the aspirations of the institution or its subunits (e.g., our goal is to have a "top ten" school of business; or, our goal is to have students who excel in oral and written communication). It is not necessary for a goal to be specific or measurable, since a goal is only a general statement. It is essential, however, for the goals to be consistent with and contribute to the agreed-upon mission of the organization and its departments.

For educational institutions, two major categories of goals should be developed: operational goals and student learning goals. Student learning goals focus specifically on factors directly related to student learning, while operational goals focus on factors not directly related to student learning, such as food service, housing, or university advancement.

Developing meaningful student learning goals is the foundation of assessing student learning for a department. In Figure 2, an example of the relationship between institutional and program goals is shown. In this example, general education has educational goals that relate to five institutional goals. The general education curriculum in the example is shown as a program. The chemistry program in the example demonstrates that not all programs have program goals that are related with other institutional goals.

Figure 2. Examples of Relationships between Institutional and Program Goals

Institutional-Level Educational Goals	General Education Program Goals	Business Program Goals	History Program Goals	Chemistry Program Goals
Leadership	Function effectively as a team member to produce a scholarly product	Develop leadership potential and political leadership	Analyze historical perspectives on individual and political leadership	
Global Citizens	Recognize and appreciate artistic and literary contributions of diverse cultures Exhibit engaged citizenry and value community service	Value and exhibit comfort with cultural differences in businesses practices Function effectively as a team member to run or manage a business	Recognize and value culturally-diverse historical perspectives	Demonstrate an ability to work as a team with a diverse group of students
Technologically Sophisticated Individuals	Use technology effectively to communicate and analyze information	Use technology effectively to communicate an analyze information related to business	Use technology effectively to communicate and analyze information related to history	Use technology effectively to collect, analyze and display data.
Effective Communicators	Write and speak proficiently	Communicate effectively, orally, and in writing about business programs	Communicate effectively, orally, and in writing about historical topics	Cogently present research data and analyses in written, visual and oral formats
Critical Thinkers	Distinguish critical from non-critical information	Use critical thinking to analyze business case studies	Critically analyze historical events and trends using scholarly techniques	Apply critical thinking skills to design an experiment that tests a hypothesis Collect, analyze, and interpret data relevant to testing a hypothesis

Source: Middle States Commission on Higher Education (2003)

Objectives

Each operational or student learning goal should then be represented by one or more objectives or intended outcomes. In contrast with goals, objectives must be specific and measurable. For example, an operational goal might be, “within the next fiscal year, the school of business will raise \$50,000 for scholarships for business students.” A student learning objective might be, “each year our senior business majors will score, as a group, at the 60th percentile or higher on the ETS Major Field Exam in Business.” This objective is specific, measurable, and has a time frame attached. A second example of a student learning goal might be for alumni to have a composite score of 80 percent on an alumni survey measuring satisfaction with their learning experience. A third example might cover the general education program of the institution (during the freshmen and sophomore years) where the intended outcome is for students to score in the 75th percentile on exams in the areas of (1) writing skills, (2) oral communication skills, (3) critical thinking skills, (4) quantitative analysis skills, (5) problem-solving skills, (6) information technology skills, and (7) value awareness.

Figure 3 shows an example of the relationship between program goals and course objectives. Usually, an academic department has a comprehensive list of course learning objectives in the course syllabi.

Objectives also should be formulated in the area of basic skills development (in other words, remedial development of basic skills such as reading, writing, and math) and personal student development. The content of the personal development program covers such activities as a student’s self-awareness, self-reliance, values awareness, interpersonal relations, and leadership qualities.

Figure 3. Relationships between Program Goals and Course Objectives

Program	Program Goals	Course	Course Objectives³
General Education Program	Recognize and appreciate artistic and literary contributions of diverse cultures	World Art History	Identify and analyze major works representing several different cultures.
		Caribbean Literature	Demonstrate familiarity with themes and genres of classic and contemporary Caribbean literature
Business Administration Program	Function effectively as a team member to run or manage a business	Introduction to Marketing	Develop a feasible marketing plan for a small business
		Capstone in Business Administration	Work with a team of students to develop, plan, manage and market a small business.
History Program	Communicate orally and in writing about historical topics	Modern American History	Present a cogent oral analysis of one long-term effect on the Cold War
		Medieval History	Present a cogently written, critical analysis of gender and class roles in Medieval England.
Chemistry Program	Collect, analyze, and interpret data relevant to testing a hypothesis	Introductory Chemistry Laboratory	Replicate chemical reactions using appropriate laboratory techniques
		Introductory Biochemistry	Collect, analyze, and interpret data relevant to a hypothesis supplied by the instructor.

Source: Middle States Commission on Higher Education (2003)

³ Course objectives are also found in course syllabi

Strategies

For each objective, there must be one or more strategies which explain how the objective will be reached. For example, the business curriculum may be structured in such a way that solid coverage of the material covered on the ETS Major Field Exam is provided. Or a program might be developed to ensure the personal development of students, beginning with freshman orientation and culminating in a senior-year experience.

Strategy Implementation

In the strategy implementation phase of the model, the steps necessary to make each strategy work are examined. A strategy may require one or more new programs, policies, or procedures. These are detailed in action plans for each strategy. Included in the action plans are the steps necessary to implement the strategy, the person(s) responsible for implementation, the time schedule for implementation, and the budgetary ramifications. An example of this is given below in the section on strategic budgeting.

Strategic Budgeting

Perhaps one of the most critical determinants of the successful implementation of a strategic plan is the extent to which it is linked to and supported by the budget and budgeting processes. In a survey of Christian business faculty and administrators, provision of adequate resources to the business unit to accomplish its mission and broad-based goals was identified as the eighth (out of 37) most important characteristic of excellence in business education, with a mean response of 4.8, with 5 being highly important (Roller et al., 2002). Interestingly, this same characteristic was ranked near

the bottom in terms of perceived accomplishment, with a mean of 3.1 and a ranking of 34th out of 37, producing the largest identified gap between perceived importance and actual accomplishment. These results clearly indicate there is room for improvement in linking resource allocation and budgeting processing with strategic planning.

Not surprisingly then, resource support for strategic planning and implementation also serves as a significant source of frustration for business deans. Bovee et al. (2001) found that business deans at small colleges and universities identified insufficiency in resources and funding as the most significant frustration they face. Resource frustrations centered on resource allocation (inadequate funding and management of the business programs as cash cows) and inadequate budget systems/processes. The second most noted frustration involved the difficulty in attracting and retaining faculty due to inadequate salaries, also a budgetary issue. Similarly, when asked to rank internal challenges they perceived, including such issues as resource limitations, loading, change management, structure, culture, faculty evaluation, and internal competition, eight of the top eleven challenges identified by deans were resource related. These included adequate staffing, funding, faculty compensation, and research support; reasonable program reinvestment; appropriate technology investment; and influence on budgeting processes.

It is clear then that while resource support for strategic planning and execution is perceived as a critical success factor, it is also presents a leadership challenge for deans. For academic budgeting to effectively support the strategic planning and execution process, it should be fully integrated into the strategic planning processes at both the unit and institutional levels. As such, an effective budgeting process:

1. Fully identifies the cost of proposed action plans;
2. Is supported by data from the planning process;

3. Is informed by clear departmental strategic priorities and rationale;
4. Is informed by full disclosure of relevant institutional priorities, constraints, and data; and
5. Generates results that are assessed and inform future planning efforts.

One useful technique for ensuring that the costs of proposed action plans are appropriately linked to the budgeting process is to include all relevant costs within the action plans associated with each objective. Figure 4 provides an example of how a specific action plan might be constructed to include the specific steps to be taken, persons accountable for each step, the associated deadlines and the anticipated costs. These cost estimates can then be incorporated into the budget development process. A key advantage to imbedding the budgetary implications within the strategic planning process is that it enables requests for additional funding to be supported by the results of assessment and environmental scanning processes and the resulting strategic priorities of the unit and institution. Reviewing the unit strategic plan with the administration helps inform institutional planning, budgeting, and priority setting; allows the unit plan to be informed by relevant institutional priorities, constraints, and data; and provides a degree of administrative commitment to the plan.

Figure 4. Action Plan Example

GOAL M: Position the Organizational Management (OM) degree as the “Degree of Choice” for adult learners in this region.

Objective M1: Promote awareness of the OM Program to community colleges and other feeder programs and to key decision makers (HR, community advocate groups, etc.) within the local community.				
Action Plan	Person with Primary Responsibility	Required Support/ Approval	Deadline	Relevant Costs
1. Successfully execute articulation agreements with regional institutions	Director of Marketing & Recruitment	OM Director	Ongoing	\$1000 Annually - OM Travel Budget
2. Encourage networking with key decision-makers by identifying opportunities, facilitating contacts, and sponsoring events	All, coordinating with Program Director and Director of Marketing & Recruitment	Division Chair	Ongoing	\$2700 Annually - OM Marketing/PR Budget
3. Increase organizational memberships	Director of Marketing & Recruitment and OM Director	Division Chair	Ongoing	\$1500 Annually – OM Marketing/Memberships Budget
4. Produce materials targeted to key decision makers (employer brochure).	Director of Marketing & Recruitment	V.P. for Admissions & Marketing	10/01/05	\$6000 in 2005, then every 3 years – OM Marketing (\$2000), Duplicating/Printing (\$3500), and Postage (\$500) Budgets

Strategy Evaluation and Control

In the strategy evaluation and control phase of the process, the focus is on ensuring, to the degree possible, that the objectives or intended outcomes set forth in the strategic plan are achieved. This depends, in turn, on accurately assessing the extent to which the intended outcomes are accomplished. In an academic setting, there are two major parts to strategy evaluation and control. The first is an operational assessment, which examines to what extent each of the operational objectives has been reached. This may also include such items as a budget evaluation and employee performance evaluations.

The second major part of strategy evaluation and control for educational institutions is the assessment of student learning outcomes (often referred to as “student outcomes assessment”). Outcomes assessment will be explored in more detail below.

The results of the operational and student learning outcomes assessments then feed back into the environmental scanning phase of the integrated strategic management model. This highlights the fact that strategic management is an ongoing process, not a one-time-use plan.

Measuring Student Learning Outcomes

The purpose of measuring student-learning outcomes is twofold: (1) to find out if the students learn what they were supposed to learn, and (2) to find out if the intended outcomes were realized. The intended student learning outcomes are specified in the strategy formulation phase of the integrated strategic management process. In the

strategy evaluation and control phase, the methods used to assess student learning must be established and set forth in an outcomes assessment plan.

One way to begin the development of an outcomes assessment plan is to first take an inventory of the assessment activities taking place in the institution and its departments. Where assessment activities already exist (e.g., alumni survey, student satisfaction survey, etc.), it is important to learn from those who are participating in the assessments which of these appear to be valuable. Such an inventory of assessment activities and results can serve as a baseline for developing the outcomes assessment plan.

Student learning may be assessed using direct and indirect measures of student learning. A variety of direct and indirect measures of student learning can be used.

Direct Measures. Direct measures of student learning provide evidence that actual learning has taken place, such as whether a student has command of a specific subject or content area, can perform a certain task, exhibits a particular skill, demonstrates a certain quality in his or her work (e.g., creativity, analysis, synthesis, or objectivity), or holds a particular value.

At the course level, examinations, regardless of format, are designed to be direct evaluations of student learning. Similarly, evaluations of writing samples, presentations, artistic performances, and exhibits provide direct evidence of student learning, as do evaluations of student performance in internships, research projects, field work, or service learning settings. In addition, grading linked to clear learning objectives is a valid and useful form of direct measurement of student learning.

At the program level, examinations may also be used as direct measures of student learning. Such examinations are more comprehensive than those embedded within a course, and are designed to evaluate cumulative, aggregate, or holistic learning at or near the conclusion of a program.

Although a locally-created test may not have the same statistical validity and reliability as a standardized instrument, its relevance to the specific learning goals in question may make it a more appropriate and effective instrument. A test blueprint (an outline that matches test items with the learning outcomes they are intended to assess) can be used to construct a test or instrument or to evaluate how well an existing homegrown instrument assesses key learning outcomes.

Indirect Measures. Indirect measures of student learning involve data that are related to the process of learning. Indirect measures reveal characteristics associated with learning, but cannot demonstrate that actual learning has occurred—they can only imply that learning has taken place. Examples of indirect measures include students' perception of learning, graduation rates, questionnaires, interviews, overall GPA, student retention, job placement rates, and alumni achievements. Frequently-used indirect measures include semester-end course and teacher evaluations.

To provide an accurate assessment of student learning, normally at least two direct and two indirect measures of student learning should be used.⁴ Figure 5 provides a listing of commonly-used direct and indirect measures of student learning.

⁴ Not all regional or specialized accrediting associations require two direct measures. Two direct measures of student learning, however, are required by the International Assembly for Collegiate Business Education (IACBE) when developing and implementing an outcomes assessment plan.

Figure 5. Direct and Indirect Measures of Student Learning

Direct Measures

1. Comprehensive examinations for seniors and graduate students in their major field of study. Either standardized national exams or locally developed exams may be used.
2. Pre-test and post-test of course knowledge and attitude.
3. Capstone course experience to evaluate subject matter competency in a particular program of study.
4. Portfolio assessment, which tracks a student's learning experience in a particular major field of study.
5. Assessment of capstone projects, theses or dissertations.
6. Professional exams (e.g., C.P.A.), licensure or certification.
7. Internships (supervisor ratings of students' performance)
8. Grades that are based on explicit criteria related to clear learning objectives
9. Others, such as oral examinations, juried reviews, and term papers.

Indirect Measures

1. Alumni surveys and their perception of their learning experience
2. Employer surveys and their perception of graduates
3. Student satisfaction surveys (perception of learning experience)
4. Exit interviews and focus groups
5. Job placement data (graduation follow-up studies)
6. Student retention studies
7. Student success in subsequent institutional settings
8. Service learning

Evaluating Techniques and the Use of Rubrics

When measurement instruments of student learning such as examinations and questionnaires are used, the assessment results need to be evaluated. Rubrics are frequently used for this purpose. A rubric uses a set of criteria for evaluating student work. A rubric helps make explicit, objective, and consistent the criteria for performance that otherwise would be implicit, subjective, and inconsistent if a single letter grade were used as an indicator of performance. Rubrics delineate what knowledge, content, skills, and behaviors are indicative of various levels of learning or mastery. Figure 6 provides a description of the characteristics and components of rubrics.

There are four basic types of rubrics (Middle States Commission on Higher Education, 2003):

Simple checklists. This form of rubric can be used to record whether the relevant or important components of an assignment are addressed in a student's work. A checklist of this sort is categorical, that is, it records whether or not a required aspect of an assignment is present, but it does not record quantitative information about the level of competence a student has achieved or the relative skill level he or she has demonstrated

Simple rating scales. This form of rubric records the level of student work or categorizes it hierarchically. An example is shown in Figure 7, which is an excerpt from an employee rating scale.

Figure 6. Characteristics and Components of Rubrics

What is a rubric? A rubric is a criterion-based rating scale that can be used to evaluate student performance in almost any area. A rubric contains *a priori* criteria for various levels of mastery of an assignment.

How is a rubric used? The person evaluating student performance uses a rubric as the basis for judging performance. Ideally, rubrics are available to students prior to their completions of the assignment so that they have clear expectations about the components of the evaluation and what constitute exemplary performance.

What are some of the criteria that may be used within a rubric to evaluate student work? Criteria can include sophistication, organization, grammar and style, competence, accuracy, synthesis, analysis, and expressiveness, among others.

What are the components of a rubric? Huba and Freed (2000) describe the following elements of rubrics:

- Levels of mastery (e.g., unacceptable through exemplary)
- Dimensions of quality (see criteria above)
- Organizational groupings (macro categories for criteria)
- Commentaries (the junctures between levels of mastery and dimensions of quality; e.g., a description of the characteristics of an exemplary organization)
- Descriptions of consequences (components of commentaries that relate to real-life settings and situations).

Where can I see examples of rubrics and learn more? Walvoord and Anderson (1998) and Huba and Freed (2000) are both excellent sources of information about the characteristics of rubrics and how to develop them. They also provide examples of various forms of rubrics.

Source: Middle States Commission on Higher Education (2003)

Figure 7. Example of a Simple Rating Scale

Rubric for Performance Evaluation by Employer

Employer's Rating of: _____

The College of Business requires its graduates to be well educated and read in order to perform in the job market. Accordingly, business curricula contain measurable and attainable learning objectives. Graduates are expected to perform successfully in the areas of knowledge, skills, and attitudes set forth below.

Please rate your intern or employee's performance in the areas that apply to his/her job.

Note: The rating scale is: 5=Excellent; 4=Good; 3=Satisfactory; 2=Fair; 1=Poor; N/A=Not Applicable.

	5	4	3	2	1	N/A
Written, Spoken, Graphic, and Electronic Communication						
1. Write coherent business reports, proposals, and letter						
2. Make coherent presentations						
3. Develop graphic, spreadsheet, and financial analysis to support a particular position						
4. Utilize appropriate visual aids						
5. Use correct grammar, and spelling						
6. Resolve interpersonal conflicts						
7. Negotiate effectively						
Critical, Creative, and Integrative Thinking						
8. Use effective problem-solving techniques						
9. Use of critical thinking to produce comprehensive and supportable conclusions						
10. Use of creative thinking to generate ideas						
11. Develop several workable strategies						
12. Demonstrate ability to learn new procedures and processes						
Technology						
13. Ability to interpret an information system						
14. Ability to interpret an operating system						
15. Understanding the use and capability of computers						
Ethics and Values						
16. Displays ethical behavior						
17. Understands values						
18. Exercises leadership						

Source: Adapted from Middle States Commission on Higher Education (2003)

Detailed rating scale. This form of rubric describes explicitly what constitutes deficient, adequate, or exemplary performance on criteria. Detailed rating scales are useful to present to students when an assignment is given because students receive a clear description of what they are expected to learn and criteria upon which their learning will be judged (see Figure 8)

Holistic rating scale. This form of rubric defines deficient, adequate, or exemplary student work as an aggregate, by assigning a single score to a constellation of characteristics that have been fulfilled to a substantial degree rather than rating each criterion separately (see Figure 9)

Figure 8. Example of a Detailed Rating Scale. This scale is adapted from one used to evaluate a “book journal and review” for a cognitive psychology class.

	Unacceptable	Fair	Proficient	Exemplary
Use of grammar and style to communicate ideas effectively	Grammar and style that interfere with a reader’s ability to understand the ideas presented	Grammar and style adequate for the reader to grasp the main concepts presented	Grammar and style allow the reader to understand easily the concepts presented	Grammar and style enhance the reader’s ability to understand the concepts presented, including nuances of thought; may provide a pleasurable reading experience
Engagement with the author’s ideas	Author’s ideas are simply repeated, indicating that engagement was at or below a surface level	Occasional discussion of the author’s ideas, suggesting ability to engage	Frequent discussion and analysis of the author’s ideas, including expression of well-supported opinions about those ideas, suggesting almost constant engagement	Rich, mature grasp of the author’s ideas, coupled with analysis and synthesis with own ideas and ideas of other writers and scholars, suggesting constant and sophisticated engagement
Connections between the course and the book	Very few connections with other experiences	Sporadic but meaningful connections with course material	Regular and meaningful connections to course material	Continual connections to course material and sophisticated discussion of those connections
Connections between other experiences and the book	Very few connections with other experiences	Sporadic but meaningful connections with other experiences	Regular and meaningful connections with other experiences	Continual connections to other experiences and sophisticated discussion of those connections

Source: Middle States Commission on Higher Education (2003)

Figure 9. Example of a Holistic Scoring Guide (for Critical Thinking)

- | | |
|--|---|
| <p>4 Consistently does all or almost all of the following:</p> <ul style="list-style-type: none"><input type="checkbox"/> Accurately interprets evidence, statements, graphics, questions, etc.<input type="checkbox"/> Identifies the salient arguments (reasons and claims) pro and con<input type="checkbox"/> Thoughtfully analyzes and evaluates major alternative points of view<input type="checkbox"/> Draws warranted, judicious, non-fallacious conclusions<input type="checkbox"/> Justifies key results and procedures, explains assumptions<input type="checkbox"/> Fair-mindedly follows where evidence and reasons lead | <p>2 Does most or many of the following:</p> <ul style="list-style-type: none"><input type="checkbox"/> Misinterprets evidence, statements, graphics, questions, etc.<input type="checkbox"/> Fails to identify relevant counter-arguments<input type="checkbox"/> Ignores or superficially evaluates obvious alternative points of view<input type="checkbox"/> Draws unwarranted or fallacious conclusions<input type="checkbox"/> Justifies few results or procedures, seldom explains reasons<input type="checkbox"/> Regardless of the evidence or reasons, maintains or defends views based on self-interest or preconceptions |
| <p>3 Does most or many of the following:</p> <ul style="list-style-type: none"><input type="checkbox"/> Accurately interprets evidence, statements, graphics, questions, etc.<input type="checkbox"/> Identifies relevant arguments (reasons and claims) pro and con<input type="checkbox"/> Offers analyses and evaluations of obvious alternative points of view<input type="checkbox"/> Draws warranted, non-fallacious conclusions<input type="checkbox"/> Justifies some results or procedures, explains reasons<input type="checkbox"/> Fair-mindedly follows where evidence and reasons lead | <p>1 Consistently does all or almost all of the following:</p> <ul style="list-style-type: none"><input type="checkbox"/> Offers biased interpretations of evidence, statements, graphics, questions, information, or the points of view of others<input type="checkbox"/> Fails to identify or hastily dismisses strong, relevant counter-arguments<input type="checkbox"/> Ignores or superficially evaluates obvious alternative points of view<input type="checkbox"/> Argues using fallacious or irrelevant reasons, and unwarranted claims<input type="checkbox"/> Regardless of the evidence or reasons, maintains or defends views based on self-interest or preconceptions<input type="checkbox"/> Exhibits closed-mindedness or hostility to reason |

Source: Peter A. Facione, Noreen C. Facione, and *The California Academic Press* (1994).

Linking the Unit with the Organization

The Integrative Strategic Management Model presented in this paper does not distinguish between the organizational and department levels of the organization, since the process is identical for the department and the organization. The major difference between strategic management at the department level and strategic management for the organization lies in the challenges of integrating the two levels. There are multiple perspectives on how this should be done. One perspective argues that the organization's strategic plan should be developed in a bottom-up fashion. In other words, the institution's strategic plan should be a compilation of the strategic plans of each of its departments. The challenge with this approach is in determining what to do about conflicting intra-departmental objectives. For example, if three different areas on campus want to develop their own major in leadership, is that a good thing for the organization? A process must be in place to make decisions regarding potentially-conflicting intra-departmental initiatives.

Another perspective is that the strategic plan should be developed in a top-down fashion, which involves setting the institutional mission, goals, and objectives, and then requiring each department to develop strategic plans that are consistent with the institution's mission and goals. The latter process may be preferred by most faith-based institutions, since it is important for their specific missions and goals to be reflected throughout the organization.

One challenge in regard to top-down strategic planning is obtaining a clear understanding of the organization's mission. Henninger (1998) contends that lack of

clarity with regard to institutional mission and goals is a significant contributor toward role ambiguity for deans. Birnbaum (1988) argues that

As colleges and universities become more diverse, fragmented, specialized, and connected with other social systems, institutional missions do not become clearer; rather, they multiply and become sources of stress and conflict rather than integration (p. 11).

In a study examining role conflict and ambiguity on academic deans, Wolverton,

Wolverton, and Gmelch (1999) assert that:

Universities need to figure out who they are, what they are about, what they want to be, whom they want to serve, and be clear about it. This is particularly pertinent for comprehensive universities, because they live a kind of schizophrenic existence—mandated to be regional institutions that offer undergraduate and master’s level education, aspiring, and sometimes being pressured, to raise to the rarified arena of research universities (p. 102).

Thus, for a top-down approach to work, it is necessary for an institution to have a clear understanding of its mission and goals and its priorities, so that the departments have a solid foundation upon which to base their strategic management processes.

If the organization’s strategic plan adopts certain goals, departments may be asked to develop compatible goals. For example, if the institution has a goal of developing critical thinking, then each department could have a similar goal, if appropriate for that department (Middle States Commission on Higher Education, 2003). For example, the general education program might determine that students be able to distinguish critical from non-critical information; the business school might determine that business students will be able to use critical thinking to analyze business case studies; the history program might decide that students should be able to critically analyze historical events and trends using scholarly techniques, and the chemistry program might ask students to apply

critical thinking skills to design an experiment that tests a hypothesis, then collect, analyze, and interpret data to test a hypothesis (Middle States, 2003).

Leading Organizational Change

The impact of an integrative strategic management model in institutions of higher education is determined in part by the effectiveness of strategic management process execution at the unit and institutional levels and by the degree of integration that exists between these processes. The dean of the business school is uniquely positioned to influence unit-level planning and institutional planning, as well as the linkages between these processes.

In discussing the challenges facing deans, Bovee et al. (2001) noted:

Deans have been described as “doves of peace intervening among warring factions, dragons holding internal and external threats at bay, and diplomats guiding and encouraging people who live and work in the college” (Wolverton, Wolverton, & Gmelch, 1999, p. 82; Tucker & Bryan, 1988). Deans are frequently looked to as visionaries and change agents, yet in the process of implementing change, they must carefully negotiate the tensions between faculty, administration, and other stakeholders (who often hold conflicting priorities with regard to the outcome), while remaining focused on the mission and goals of the institution (Montez & Wolverton, 2000; Austin, Ahearn, & English, 1997). Furthermore, because of the role of faculty in academic decision-making, effective leadership as a dean requires persuasion, collaboration, and consensus building, rather than reliance on rank, power, and formal authority (Shenkir, 1997; Stevens, 2000). Heninger (1998) affirms that deans serve as critical levers in facilitating change by involving and coordinating faculty in the decision-making process and signaling academic priorities. Birnbaum (1992) described the leadership paradox faced by deans as shepherding higher education into the 21st century while attempting to survive in a culture unsupportive of change (Montez & Wolverton, 2000, p. 4).

There are a number of ways that a dean can directly influence the effectiveness of strategic management efforts (planning, budgeting, and assessment), including:

- Leading school-level planning and assessment efforts;
- Meaningfully involving faculty and staff in the strategic management process;
- Ensuring that the school's strategic plan is appropriately informed by operational and student learning assessment results and environmental scanning;
- Clearly defining a relevant mission and goals for the school that support the institutional mission and goals;
- Clarifying the strategic priorities of the school and ensuring that these priorities are in alignment with those of the institution;
- Communicating the school's strategic priorities and budgeting implications to the administration (in the context of presenting the strategic plan for review and approval);
- Implementing school-level performance evaluations that are tied to strategic goals and priorities; and
- Ensuring that annual operating and capital budget requests flow from and are supported by the strategic plan.

Each of these tactics provides an opportunity for the dean not only to directly influence the effectiveness of strategic planning efforts, but also provides the dean an opportunity to lead by example and to gain credibility and influence within the broader institution. This will be particularly true when unit-level processes visibly contribute toward broader institutional goals and priorities. A number of strategy-critical processes including resource allocation, organizational structure, faculty evaluation and development, and organizational culture, are typically governed at the institutional level,

but may have significant unit-level implications. Interestingly, Roller et al. (2002) found that these factors experience the greatest gaps between perceived importance to excellence in business education and perceived level of accomplishment. It is reasonable to conclude that these factors are strategically significant for many business programs and, therefore, warrant creative strategies for strategic influence.

In addition to the strategies that have already been mentioned, a number of other techniques might increase the strategic influence of the dean or chair. These include:

- **Collaboration and Consensus:** Identify goals and concerns shared by other deans and chairs or by the administration and offer to help initiate collaborative recommendations and/or solutions.
- **Incremental Wins:** Identify incremental steps that can be taken toward a longer-term strategic solution that would not otherwise be feasible in the short-run and celebrate resulting improvements.
- **Managing Upward:** Initiate regular dialogue with the academic administration, including solicitation of input into and review and approval of the unit-level strategic plan, periodic review of progress toward goals (at least annually), and discussion of how the dean or chair and the academic unit can better contribute to institutional priorities.
- **Asking Questions:** As a dean or chair gains credibility and respect by his/her peers (and achieves tenure), he/she can help shape the discussion and priorities by asking some hard strategic questions of the administration, such as:
 - What are the institutional priorities?

- In what ways does the institutional budget support the strategic goals, objectives, and priorities of the institution?
- How does the budgeting process incorporate unit-level strategic planning?
- How are unit-level and institutional planning and assessments efforts aligned?
- **Professional Accreditation:** One advantage of pursuing specialized accreditation, particularly through the International Assembly of Collegiate Business Education (IACBE), is that it provides a degree of accountability (and support) for the business school in effectively implementing an integrative strategic management model, as well as external leverage to address strategic program quality issues that require institutional support.
- **Information Sharing:** Volunteer to share information, data, processes, best practices, etc. with other deans and administrators, modeling a willingness to share information and ideas.

It is important to note that some of the strategies suggested may not immediately endear the dean to the administration or even be perceived as helpful, but results have a way of beginning to shape or re-shape opinion, perceptions, and priorities. The ability to maintain a long-term perspective and to remain optimistic and hopeful in the interim is often an important ingredient to leadership success in higher education.

Organizational Culture

An important factor in leading organizational change is the culture of the institution. This is particularly true when proposing changes in the assessment process. An institution's culture is usually an important ingredient in having an effective and

successful outcomes assessment process. The following seven questions should be answered as institutions embark on new or changed assessment activities (Middle States Commission, 2003):

1. What is the quality of communication on campus? Can it be improved before implementing an assessment plan?
2. How is decision-making handled on campus, both formally, and informally?
3. What is the level of trust on campus? If trust is a problem, how can it be earned?
4. What person or persons on campus are perceived to hold unofficial power? How can those persons be convinced of the benefits of assessment? How can they serve as sources of support for assessment initiatives?
5. What is the system of apportioning resources on campus? If there are concerns about equity of resource distribution (or perceived concerns), can they be addressed before implementing an assessment plan?
6. What is the process by which curricula and programs are approved and revised? Does the process present any impediments to assessment, and can it be improved or streamlined?
7. Are there collective bargaining agreements, union-wide or local, which could either support or impede assessment practices? For example, are union funds available to support faculty development that could be used for assessment? Do union rules restrict “official” work during the summer?

Answers to these questions should be considered when devising strategies for leading organizational changes regarding assessment activities. Otherwise, the change efforts will probably not be as successful as hoped.

Conclusions

In this paper, we have presented an integrative strategic management process for use by educational institutions and their departments that integrates strategic planning, budgeting, and outcomes assessment. The process is cyclical and ongoing, requiring the development of a plan, its implementation, and then using the results to feed back into the process, resulting in a continuous quality improvement process.

We believe that an integrated strategic management process has the potential to increase the institution's efficiency and effectiveness; enhance cooperation, communication, collaboration, and participation in decision-making across departments; provide clear linkages among strategic planning, budgeting, and outcomes assessment; allow for strategy-driven budgeting; and provide increased assurance of quality for stakeholders.⁵

The transition to an integrative strategic management process, at either the unit or institutional level, is likely to occur on an incremental basis at most institutions. Organizational culture will significantly influence the pace and the process of this change. We have offered some practical suggestions for unit-level leaders to positively influence this process.

⁵ If an organization uses this approach, we should note that it would still be possible to derive budget and outcomes assessment documents from the integrative strategic plan, should a need for stand-alone documents occur.

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