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The Impact of Generational Perceptions of Interactional Justice on Workplace Citizenship Behavior

Arlene Ramkissoon, Ohio Dominican University
Ronald M. Johnson, University of Pittsburgh

Abstract: This study is rooted in the concepts of social exchange theory and psychological contracts. It seeks to determine: (i) the effect of interactional justice on organizational citizenship behavior and (ii) if there is a generational impact on the effect of interactional justice on the dimensions of organizational citizenship behavior. The results show that interactional justice influences organizational behavior for the dimensions of altruism, conscientiousness, courtesy and civic virtue. There was also support for a generational relationship. Contrary to the hypothesized relationship, it was found that the connection between interactional justice and organizational citizenship behavior was stronger for members of Gen X, as compared to the Millennial generation.

INTRODUCTION

This research concerns members of the workforce who belong to different generational cohorts. The generational theorist Mannheim (1952) purported that a generation consists of a cohort of a populace who shared the experience of similar noteworthy events during their early years, within a particular period of time. The workforce in the United States is comprised of employees who belong to four different generations. Namely, the Silent Generation whose members were born between 1925 to 1945, the Baby Boomers who were born between 1946 and 1964, Generation X who were born between 1965 and 1981, and Millennials also known as GenMe, Gen Y, nGen and iGen who were born between 1982 and 1999 (Twenge, Campbell, Hoffman, & Lance, 2010). According to the U.S. Department of Labor Bureau of Labor Statistics (BLS), Millennials, followed by Gen X, are now the largest pool of people in the job market today. This, coupled with the expected surge of Baby Boomer retirees, justifies the importance of attracting and retaining Gen X and Millennial employees. For the purpose of this research, two generations will be examined; Generation X (Gen X) and Millennials.

It has been documented that generational differences exist with respect to personality, work attitudes and work behavior (Twenge & Campbell, 2008). Therefore, it is logical to ask, do members of the different generations have different cognitive assessments of whether they are treated fairly in the workplace? Also, does their perception of fair treatment result in their performance of extra role behaviors in the workplace? The unique life experiences of being born in the different generations have lent a hand in shaping the beliefs and behaviors of many employees in the workforce.

For example, employees who belong to Gen X experienced their formative years when economic instability was high, ethical violations created scandals in prominent organizations and the world was faced with the advent of AIDS. Many of these employees were the children of parents who were faced with job loss and job insecurity and therefore they adapted by learning to be independent, confident and prefer autonomy. Members of Gen X often display low organizational loyalty while simultaneously remaining loyal to their job and coworkers hence they often switch organizations without feelings of guilt (Neil, 2010).

Millennials were born into a society in which technology and globalization were at the forefront (Shragay & Tziner, 2011). They grew up in an age of instant news, social media, and being virtually connected at all times. Their parents showered them with a lot of attention and opportunity which they themselves did not enjoy as children. Millennial children were encouraged to work hard, achieve and to take advantage of
opportunities. Millennial employees are people oriented and tend to be very comfortable with working in groups. They value opportunities for professional development and continued learning (Gong, Greenwood, Hoyte, Ramkissoo, & He, 2016). Millennial employees desire structure, mentoring, feedback, and managerial support from their superiors (Shragay & Tziner, 2011). They are technologically inclined, creative, and prone to volunteering at work (Leyden, Teixeira, & Greenberg, 2007).

Companies are aware of the need to understand what motivates their employees; especially those who belong to the Gen X and Millennial cohorts since they are the future of the organizations. The perpetual need for increased performance at a low cost to the organization has prompted organizations to look for ways in which their employees can be motivated or encouraged to perform beyond the confines of their formal job responsibilities in order to increase efficiency and productivity. This study looks at the potential use of social interactions in the form of interactional justice as a way of encouraging helping behaviors in the form of organizational citizenship behavior (OCB). If social interactions are found to be good predictors of OCB in either or both Gen X and Millennial cohorts, managers can use this knowledge as an advantage. Increased interactional justice can be used to boost work relations as well as work performance at an individual and by extension, an organizational level, at minimal or no cost to the organization.

INTERACTIONAL JUSTICE AND OCB

Interactional justice is the facet of organizational justice which deals with the “the nature of the interpersonal treatment received from others, especially key organizational authorities” (Greenberg, & Colquitt, 2005, p.5). There are two main components of interactional justice: interpersonal and informational justice. Interpersonal justice is characterized by the extent of respect and courtesy displayed by supervisors or coworkers who implement procedures. In other words it deals with the fairness of social interactions in the workplace. Informational justice is focused on the reasons behind the allocation of particular outcomes or why policies or procedures were executed in a particular fashion (Lind & Tyler, 1988).

It stands to reason that employees who perceive high quality interactions in the workplace would be more apt to reciprocate by performing acts which go above and beyond that which is written in the formal job contract (Ramkissoon, 2016). These behaviors are referred to as organizational citizenship behavior (OCB). OCB refers to “individual behavior that is discretionary, not directly or explicitly recognized by the formal reward system, and in the aggregate promotes the efficient and effective functioning of the organization” (Organ, Podsakoff, & Mac Kenzie, 2006, p.3). The helping behaviors of OCB can be categorized into 5 dimensions: altruism, conscientiousness, courtesy, civic virtue and sportsmanship (Organ, 1988). It has been documented that “organizational citizenship behavior varies positively with the extent to which a person believes that fairness has been obtained in his or her relationship with the organization” (Organ, 1988, p. 61). While the effect of fairness in the forms of distributive justice and procedural justice has been well documented, the same cannot be said for the influence of interactional justice on OCB (Abu Elanain, 2010; Cohen-Charash & Spector, 2001).

The relationship between interactional justice and organizational citizenship behavior may be explained by social exchange theory (Blau, 1964). The premise of social exchange theory is that employees who perceive that they are the recipients of valuable outcomes by their manager or organization will reciprocate this gesture at some point in the future. They do this in order to sustain the relationship which benefits both themselves and their manager or organization. These exchanges can be either economic or social. Social exchanges, encourage reciprocated behavior which is based on a psychological contract, with reciprocation being left up to the discretion of the employees (Niehoff & Moorman, 1993).
The nature of social exchanges allows them to be excluded from a formal contract and therefore leaves room for employees to use their discretion to reciprocate in an extra-role manner. If employees view their supervisor-employee interactions with their supervisor as one of a social contract they may be moved to perform certain behaviors based on whether they feel that their communication or interaction with their managers is of a high quality. Thus, it can be hypothesized that there is a positive relationship between interactional justice and OCB.

**H1: Interactional justice is positively related to the dimensions of OCB.**

If this argument is taken further with Gen X employees who are known to be low in organizational loyalty, while being loyal to coworkers, (Neil, 2010) it makes sense to think that if they perceive their supervisor-employee interaction as one of high quality they may be prone to exhibiting OCBs. On the other hand, Millennials who are known for wanting opportunities for advancement, feedback, and guidance from their managers may have a high appreciation for the quality of interaction they have with their supervisors and may be highly prone to reciprocate with acts of OCB. Since Millennial employees are less concerned about monetary compensation (Twenge et al., 2010), are more social, are more comfortable with teamwork, and tend to place value on doing a job that they love, they might also be more motivated to help others at work cite. Therefore, it can be hypothesized that interactional justice is positively related to the dimensions of OCB such that it is stronger for Millennial employees than for Gen X employees.

**H2: Interactional justice is positively related to OCB such that the relationship is stronger for Millennial employees than for Gen X employees.**

**METHOD**

A sample population of 250 full-time adult employees was sourced using an online crowd sourcing website. Data were collected when participants voluntarily completed a self-administered survey. In order to promote the likelihood that that the target population will participate in the survey, each participant was required to respond to a question which asked if he or she was a full-time, English speaking worker, above the age of 18, and currently employed in the United States. Only participants who responded in the affirmative were permitted to complete the survey.

**MEASURES**

The independent variable was the justice dimension of interactional justice while the dependent variables were the OCB dimensions of: altruism, courtesy, conscientiousness, civic virtue, and sportsmanship (Organ, 1988). Each participant was subjected to Interactional Justice and OCB surveys. Data were collected and measured at the individual unit of analysis.

The demographic data collected included: gender, age, ethnicity, highest level of education attained, current job tenure and job position. Items twelve through eighteen of the eighteen item Organizational Justice Scale developed by Niehoff and Moorman (1993) was used to assess the participants’ perception of the degree of interactional justice present in their workplace. Items one through eleven were not used since items one through five measure perceptions of distributive justice, while items six through eleven measure perceptions of procedural justice. The items are measured on a five-point scale which ranges from strongly disagree to strongly agree. The Cronbach’s alpha for the interactional justice dimension was found to be .91 (Zhao, Peng, & Chen, 2014). An example from this scale is “My supervisor explains clearly any decision if it is related to my job.”
OCB was assessed using the 24 item Organizational Citizenship Behavior Scale developed by Podsakoff, MacKenzie, Moorman & Fetter (1990). This scale measures the five dimensions of OCB which are: altruism, courtesy, conscientiousness, civic virtue, and sportsmanship (Organ, 1988). The measurement ranges from “strongly disagree” to “strongly agree”. Examples of scale items are: “I help others who have heavy workloads” and “I try to avoid creating problems for coworkers”. Cronbach’s alpha for this scale was found to be 0.97 (Erkutlu, 2011).

RESULTS

The data consisted of 250 usable responses. Descriptive statistical analyses were first performed on the data to ascertain medians, means, modes, and frequencies of the demographic factors. Demographic measures included the survey were: gender, birth year, ethnicity, level of education received, tenure at the present organization, and job position. The sample population consisted of 41.2% females \( (n = 103) \) and 58.8% males \( (n = 147) \). The sample population had a mean age of 35 and a median age of 32 years. Most of the respondents were White Caucasians (73.6%). Ninety percent of the respondents worked at their present organization for less than 4 years while 30.8% had an organizational tenure of 5 to 9 years. Most of the respondents (60.4%) held non-managerial positions in their organizations.

The data was analyzed using a two-step approach. Step one involved conducting a linear regression analysis to test hypothesis 1. Step two involved conducting a Mann-Whitney U test for the dimensions of OCB to determine if there is a difference in the medians between Gen X and Millennials to test hypothesis 2.

Hypothesis 1

First, linear regression was performed in IBM SPSS Statistics 22 to determine if there is a significant relationship between interactional justice and the five dimensions of OCB as postulated in hypothesis 1. Linear regression was used to produce correlations between interactional justice and the five OCB dimensions of altruism, conscientiousness, courtesy, civic virtue and sportsmanship. As depicted in Table 1, the correlation coefficients between the predictor variable of interactional justice and the dependent variables of OCB dimensions showed that interactional justice had positive significant correlation coefficients of .36, .27, .33 and .45 with OCB altruism, OCB conscientiousness, OCB courtesy, and OCB civic virtue respectively at \( p < .01 \). Simple linear regression showed that 12.6% of the variance in OCB altruism, 7.3% of the variance in conscientiousness, 10.7% of the variance in OCB courtesy, 20.2% of the variance in OCB civic virtue, and .10% of the variance in OCB sportsmanship can be explained by interactional justice.

Since interactional justice did not have a significant correlation with OCB sportsmanship; this OCB dimension was excluded from further analysis in this study.

Hypothesis 1 was therefore supported for the OCB dimensions of altruism, conscientiousness, courtesy and civic virtue.

Hypothesis 2

Recall that H2 hypothesized that interactional justice is positively related to OCB such that the relationship is stronger for Millennials than for Gen X employees. A priori, the data is assumed to be non-normally distributed, thus a Mann-Whitney U test was performed using IBM SPSS Statistics 22 for the dimensions of OCB to test for a difference in the medians between Gen X and Millennials. The Mann-Whitney U test uses medians, rather than means, to test for these differences and is appropriate when the data are non-normal (Pallant, 2007).
### TABLE 1
**MEANS, STANDARD DEVIATIONS, AND INTERCORRELATIONS AMONG VARIABLES**

<table>
<thead>
<tr>
<th></th>
<th>Mean</th>
<th>Std. Deviation</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Interactional Justice</td>
<td>3.635</td>
<td>.825</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. OCB Altruism</td>
<td>5.341</td>
<td>1.102</td>
<td>.355**</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. OCB Conscientiousness</td>
<td>5.357</td>
<td>.997</td>
<td>.270**</td>
<td>.629*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. OCB Courtesy</td>
<td>5.605</td>
<td>.930</td>
<td>.326**</td>
<td>.709**</td>
<td>.684**</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. OCB Civic Virtue</td>
<td>4.830</td>
<td>1.206</td>
<td>.450**</td>
<td>.653**</td>
<td>.493**</td>
<td>.539**</td>
<td></td>
</tr>
<tr>
<td>6. OCB Sportsmanship</td>
<td>5.097</td>
<td>1.258</td>
<td>.038</td>
<td>.152**</td>
<td>.242**</td>
<td>.351**</td>
<td>.096</td>
</tr>
</tbody>
</table>

*p < .05, two-tailed. **p < .01, two-tailed.

The Mann-Whitney tests revealed that there was a significant difference between Gen X and Millennials on all the OCB dimensions; Altruism (Md = 5.6, n = 67) for Gen X; (Md = 5.4, n = 154) for Millennials; Conscientiousness (Md = 5.6, n = 67) for Gen X; (Md = 5.2, n = 154) for Millennials; Civic Virtue, (Md = 5.0, n = 67) for Gen X and (Md = 4.75, n = 154) for Millennials; and, Courtesy (Md = 5.8, n = 67) for Gen X and (Md = 5.8, n = 154) for Millennials. While the effect size was small, using Cohen’s (1988) criteria, Hypothesis 2 was not supported. The effect sizes were: OCBAltr = .07; OCBCons = .17; OCBCourt = .12; and OCB CivVi = .03. Mann-Whitney U values were: OCBAltr = 4706.000; OCBCons = 4060.000; OCBCourt = 4380.500, and OCB CivVi = 4963.500.

The direction of the difference is also important, as Gen X respondents displayed higher statistically significant differences than Millennials on the dimensions of OCB in all cases. The medians for the dimensions of OCB are shown in Table 2. The results show that while interactional justice is positively related to OCB, the relationship is stronger for Gen X employees than for Millennial employees which is contrary to H2.

### TABLE 2

<table>
<thead>
<tr>
<th></th>
<th>Gen X Md</th>
<th>n 154</th>
<th>Millennial Md</th>
<th>n 67</th>
<th>Effect Sizes</th>
<th>U Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Altruism</td>
<td>5.6000</td>
<td>5.4000</td>
<td>.07</td>
<td>4706.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conscientiousness</td>
<td>5.6000</td>
<td>5.2000</td>
<td>.17</td>
<td>4060.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Courtesy</td>
<td>5.8000</td>
<td>5.8000</td>
<td>.12</td>
<td>4380.500</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Civic Virtue</td>
<td>5.0000</td>
<td>4.7500</td>
<td>.03</td>
<td>4963.500</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### DISCUSSION

This research tested the relationship between interactional justice and the dimensions of OCB. This relationship was tested to the extent of determining that not only does interactional justice influence the OCB dimensions of altruism, conscientiousness, courtesy and civic virtue for both Millennials and Gen X’ers, but also that this relationship is stronger for the Gen X segment of the workforce than for
Millennials. Managerial implications based on the results are offered in this section as well as limitations and recommendations for future research.

The results offer a unique perspective of managing workforce generations. Managers can use the insight gained from this study to tailor the way they interact with their employees based on the generation to which they belong. For example, Millennial employees have a different view of the world than their counterparts in preceding generations, therefore organizations should capitalize on this generation’s unique perspective through social interactions. As this study shows, social exchange, in the form of the quality of social interactions between managers and their subordinates, can act as an effective tool which can motivate employees to act in the best interest of the organization. Managers can ensure that their interactions are of a high quality by giving frequent feedback, facilitating employee participation, and matching their Millennial employees with mentors. Working in teams is also encouraged for members of this generation. Since managerial support is important for this generation, praise and feedback should be given when due.

Social exchange can also be used as a tool to motivate Gen X employees who had a stronger relationship than Millennials between the constructs of interactional justice and the OCB dimensions of altruism, conscientiousness, courtesy and civic virtue. Managers can use social interaction to foster a sense of comradery for these employees since they are usually loyal to their co-workers and their managers. Also, maintaining the bridge of communication between Gen X’ers and their co-workers is important especially since they prefer to work autonomously.

The limitations of this study include the sample number which was large enough to be statistically significant but was not large enough to represent the general populace of Millennial and Gen X employees. Also, these data were self-reported and interpretations of constructs such as interactional fairness were subjective.

Future research should replicate this study in a known organization or firm since this study sourced employees from different industries across the United States. In addition, this study should also be replicated to include all generations of the workforce for a more comprehensive understanding of how different generations respond to perceptions of social interaction. Last, a larger sample should be used which will be more representative of the general population of the United States.

CONCLUSION

It can be concluded that interactional justice is related to the OCB dimensions of altruism, conscientiousness, courtesy and civic virtue and that this relationship is stronger for employees of the Gen X generation than those of the Millennial generation.

REFERENCES


Building Consumer Competence and Trust: HRD Professionals as Champions of Change

Rubina F. Malik, Morehouse College
Gouri Gupte, Cambridge Health Alliance
Brandy Edmondson, New York University
Vickie Cox Edmondson, Morehouse College

Abstract: Despite allocating significant institutional resources to establishing consumer trust, organizations often unintentionally fail to ensure that the social contract between the organization and its customers is upheld and that trust is the center of every transaction. This paper seeks to answer the questions of what role, if any, do organizations play in improving consumer competence and trust, and what substantive role can human resource development professionals play in that effort? Five consumer learning strategies using adult learning principles are set forth along with a decision-making framework that can support an organizational change in the power relationship between vulnerable consumers and organizations. The proposed decision-making framework is intended to serve as a starting point for human resource development professionals and organizations as they examine their strategies to determine how they may be changed to meet the needs of less powerful consumers and build trust.

Keywords: Consumer competence development, Formal and informal learning, Human resource development.

Organizations, despite great effort, often fail to ensure that the social contract with their customers is upheld and that trust is at the center of every transaction. Consumer competence has increasingly become more important (Berg, 2007) given the challenges organizations face in ensuring the strategies they use are perceived to be ethical and in the best interest of consumers. To confront this challenge, organizations are adjusting by educating the consumer about the benefits of their products or services as well as making sure that the information that is provided is easy to understand and enable them to engage the consumer for the long term (White House Legal Aid Interagency Roundtable, 2015). Although consumers may try to make wise, rational choices in their own self-interest, a lack of complete information on the market will likely leave them vulnerable at some point in their lives (Mansfield & Pinto, 2008; Sassen, 2014; Tellis & Gaeth, 1990). This may be a result of strategies that have been employed with the goal of creating profits and revenue streams, without regard for the effect of their decisions on consumers’ learning and well-being (Arli, Thiele & Lasmono, 2015).

HRD professionals are notable for their ability to work in a wide range of industries to help organizations leverage intellectual capital for better performance (Kang & Snell, 2009). This includes the development of sound, ethical, trust building strategies, and an organizational culture that demonstrates an understanding of vulnerable consumers and the needs and values that factor into their decision-making process. While HRD professionals and senior executives are making these decisions, it is not always easy to categorize a given strategic behavior as clearly ethical or unethical. However, senior executives with strong ethical convictions are generally proactive in linking strategic actions and ethics. Ethical practices should be concerned with the behaviors and practices that ensure organizations behave fairly toward their consumers and are good corporate citizens.

While much of the early focus on ethics concentrated on the marketing of low-quality goods to consumers, more recent attention has been placed on marketing to vulnerable consumers (Harrison & Gray, 2010; Hill, 2002; Jones & Middleton, 2007; McDaniel, Kinney & Chalip, 2004; Wallendorf, 2001; Williams, & Aitken, 2011). Much of the debate centers on the use of exploitative strategies without regard for what is advantageous for the consumer and whether leadership has a responsibility to groups
that are considered vulnerable (Bevan, 2012; Cui & Choudhury, 2003; Karpatkin, 1999; Laczniaik, 1999; Murphy, 2010). Although ethical decision-making is desirable, Wheelen and Hunger (2012) argue that because no worldwide standard of conduct for business people exists, people who are involved in unethical decision-making may not be aware of their ethical lapses and their effect on others. Nonetheless, there are some generally accepted rules of ethical conduct - to do no harm and level the playing field in regards to vulnerable consumers.

We offer a decision-making model along with learning strategies that HRD professionals can use to address the imbalance of power between vulnerable consumers and organizations. The model can be used to build consumer trust in the way that vulnerable consumers are treated regardless of industry. We begin by defining key concepts that will be discussed throughout this paper. Then, we identify three types of consumers based on power relationships, followed by a discussion of formal and informal learning strategies. Next, we discuss the ethical issues and the ethical responsibility to vulnerable consumers. Thereafter, we discuss how consumer learning strategies can help develop consumer competence, and ultimately, trust. Finally, we present the model and strategies.

KEY CONCEPTS AND DEFINITIONS

To aid in our discussion, we define key concepts that can help HRD professionals and providers in their efforts to meet the needs of vulnerable consumers. We begin by defining consumers as learners. We view consumers as learners with varying levels of knowledge and firms as educational instruments or dispensers of knowledge. As Jubas (2011) proposed, the buying experience is an opportunity for consumers to learn how products and services benefit them and society as a whole.

Consumer expertise has been defined as the ability to perform product-related tasks successfully (Mallalieu & Palan, 2006). According to Mallalieu and Palan (2006), these tasks include information searches, interactions with salespeople, choice and decision-making, and the various tasks involved in making a purchase, e.g., handling money, dealing with credit terms, and understanding warranty and return policies.

Consumer competence means the buyer is informed about products and services, and also familiar with how markets function (Berg, 2007). While all consumers may not have the expertise, competence can be attained. Competent individuals have a sense of self-confidence in their abilities to obtain valued outcomes and exercise self-control and self-regulation.

Consumer vulnerability has been defined in various ways, but one of the most constructive definitions describes it as a state of powerlessness arising “from the interaction of individual states, individual characteristics and external conditions within a context where consumption goals may be hindered and the experience affects personal and social perceptions of self” (Baker, Gentry & Rittenburg, 2005, p. 134). Although consumers may be competent in one buying experience, they may be vulnerable in other buying experiences.

We look to the relationship marketing literature for clarity regarding trust and confidence. Sirgy and Lee (2008) argued that relationship marketing is grounded in a stakeholder theory of business ethics and, while stakeholder theory serves society better than transaction marketing, relationship marketing focuses on the development and maintenance of quality relationships between exchange partners for mutual benefit. This theory posits that a company’s relationship with its customers has a direct effect on their willingness to buy from the company, and trust is a key factor in building customer relationships (Morgan & Hunt, 1994).

We consult the human resources literature for operational conceptions of trust and confidence. Robinson (1996) defines trust as "one's expectations, assumptions or beliefs about the likelihood that another's
future actions will be beneficial, favorable, or at least not detrimental to one's interests" (p. 576). Evidence of trust is the willingness of a party to be vulnerable to the actions of another party (Mayer, Davis, & Schoorman, 1995). In terms of consumers, trust has been defined as "the expectations held by the consumer that the firm is dependable and can be relied on to deliver on its promises" (Sirdeshmukh, Singh, & Sabol, 2002, p. 17).

Another key component of relationship marketing is confidence (Berry, 1995; Hennig-Thurau, Gwinner, & Gremler, 2002; Kinard & Capella, 2006). We define confidence as the perception that another party has the ability to perform as expected. We argue that someone can have confidence in another party, but not trust them. For example, consumers may turn to shady lenders because they have been turned down by or do not trust traditional banks. They may not trust the lenders to be ethical either, but they have confidence that the lenders can help them achieve their goals.

Three Types of Consumers Based on Power Relationships

Although consumerism aims to promote equality (Jubas, 2011), differences in vulnerability across various consumer segments have been well acknowledged and a variety of theories have been developed to explain why certain groups are considered more challenging than others (Shultz & Holbrook, 2009). Carroll and Buchholtz (2006) asserted that the foundation of corporate social responsibility lies in the institutions’ power/responsibility relationship with its stakeholders. They argued that power cannot be viewed in isolation from responsibility and when power becomes imbalanced, organizations must exercise greater responsibility. Griffin and Prakash (2014) included consumers in the range of stakeholders that firms have a responsibility to consider when ethically managing responsibility. Giving, responding and exhibiting strong communication is critical (Cox Edmondson & Malik, 2013). Moreover, Baker, Gentry, and Rittenburg (2005) have shown that imbalances in the interactions between an organization and its consumers results in a higher level of consumer vulnerability.

Thus, we maintain that consumer vulnerability is based on the power that an individual or groups of individuals with similar concerns have in a customer relationship (Lee & Soberon-Ferrer, 1997). Moreover, to engage and educate consumers, organizations need to be cognizant of consumers’ varying levels of vulnerability. For the purposes of this study, we conceive of three types of consumers: 1) the powerful; 2) the average; 3) the less powerful.

**Powerful consumers** are well equipped to make good buying decisions that benefit them over the long term. This group would be the educated consumers, who do research and inform themselves before buying a product. Their buying decision may actually put the marketer at a disadvantage because of the extent to which they are able to make well-informed decisions.

The **average consumer** is one who is capable of entering into a relationship with the organization on an equal footing. This is the ideal situation because both the consumer and the institution understand how procuring services works, along with their benefits and drawbacks.

The third type of consumer, **the less powerful**, includes consumers that are often referred to as disadvantaged consumers (Andreasen, 1993) because they are not informed well enough to understand if they are being taken advantage of by the organizations that supply products and services to them (Rucker, Galinsky & Dubois, 2012). Moreover, the literature suggests that three types of less powerful consumers exist: 1) the satisficers, 2) the disadvantaged, and 3) the vulnerable (Rucker et al., 2012; Lammers, Stoker & Stapel, 2009).

Satisficers voluntarily give up their power. They are willing to settle for less than the optimal product or service (Simon, 1956; Schwartz, 2004). Some might argue that such consumers are not, in fact, problematic because they are poised to make a better decision, but choose not to do so. However, from a
relational perspective, there is a greater probability of dissatisfaction with the firm should the satisficers later determine that their choice was unwise.

**TABLE 1: THREE TYPES OF CONSUMERS BASED ON POWER RELATIONSHIPS**

<table>
<thead>
<tr>
<th>CONSUMERS</th>
<th>RESEARCHER(S)</th>
<th>DEFINITION/DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Powerful</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educated</td>
<td>Thorelli (1971)</td>
<td>Product informed elite</td>
</tr>
<tr>
<td></td>
<td>Persaud and Irfan (2012)</td>
<td>Savvy, value information, embrace marketing, more positive attitude to innovative products</td>
</tr>
<tr>
<td>Average</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Normal or Ordinary</td>
<td>Brenkert (1998)</td>
<td>The standard by which consumers are compared</td>
</tr>
<tr>
<td>Less Powerful</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Satisficers</td>
<td>Simons (1956)</td>
<td>Settle for services and products that are 'good enough’</td>
</tr>
<tr>
<td></td>
<td>Swartz (2006)</td>
<td></td>
</tr>
<tr>
<td>Disadvantaged</td>
<td>Andreasen (1993)</td>
<td>Someone capable of being affected</td>
</tr>
<tr>
<td>Susceptible</td>
<td>Morgan and Riordan (1983)</td>
<td>Someone who has idiosyncratic reactions to products that are otherwise harmless to most people. Small minority of the market.</td>
</tr>
<tr>
<td>Unusually Susceptible</td>
<td>Morgan, Schueler, and Stoltman (1995)</td>
<td>Groups or persons who are particularly prone to being harmed by products.</td>
</tr>
<tr>
<td>Vulnerable</td>
<td>Brenkert (1998)</td>
<td>Someone capable of being harmed</td>
</tr>
</tbody>
</table>

Rather than referring to less powerful consumers as the disadvantaged, George and Lennard (2007) argued that the term “at a disadvantage” described vulnerable consumers better. They argued that “at a disadvantage” covered people who, “through individual circumstances, are likely to be economically and/or socially excluded, and everyone who is actively placed at a disadvantage as a result of the policies and practices of organizations providing services and goods” (p. 61). We assert that such attributes place
consumers at a disadvantage only if the firm chooses to deceive buyers willfully based on the perception that such factors are exploitable.

Consumers are considered to be vulnerable if they are particularly susceptible to harm when the qualitatively different experiences and conditions that characterize them (and on account of which they may be harmed) derive from factors (largely) beyond their control (Brenkert, 1998). It has been noted that minority youths and lower class (less powerful) citizens tend to remain disadvantaged (Jubas, 2011). According to Jones and Middleton (2007), attributes that are frequently considered when investigating consumer’s vulnerability include: age, gender, race/ethnicity, education, and socioeconomic status. While gender and race/ethnicity of a consumer are unchanging, and education and socioeconomic status may be enhanced over time, research shows that decision-making capacity eventually diminishes with age, thus presenting a challenge for aging consumers attempting to make informed decisions regarding their well-being (Griffiths & Harmon, 2011). Additionally, given the presence of immigrant consumers in the U.S. economy, Penaloza (1995) also stressed the language barrier that affects many immigrant consumers. We define vulnerable consumers as those less powerful consumers who lack the ability to process how best to make a decision or who do not have enough information to make a sound buying decision. Table 1 provides a compilation of the types of consumers as defined by various researchers in the literature.

The Need for Formal and Informal Consumer Learning

Although adult learners are amenable to new ideas over time, they are usually resistant in the beginning. A part of the resistance is the challenge of showing the value of change before the consumer has experienced it, particularly if they are encountering an “unfamiliar/beyond comfortable” experience (Drago-Severson & Blum-DeStefano, 2014). We assert that change in the behavior of HRD professionals and senior executives is needed to equalize the balance of power between organizations and vulnerable consumers. Two ways to address the imbalance is through consumer learning and education. Although a consumer is always engaged in learning, whether formally or informally, we suggest that consumer learning is informal and consumer education happens through formal learning.

Historically, the facilitation of formal learning programs and activities in organizations has been the role of HRD. HRD has been defined to provide “training activities” (Bierema & Eraut, 2004, p. 53). The formal learning programs were “to build the capacity of individuals, teams, and organization with a systematic approach with a long-term focus” (p. 54). Marsick and Watkins (1990) state that “typically, formal learning is institutionally sponsored, classroom-based, and highly structured” (p. 12).

On the other hand, informal learning as discussed by Marsick and Watkins (1990) “includes incidental learning, may occur in institutions, but it is not typically classroom-based or highly structured, and control of learning rests primarily in the hands of the learner” (p. 12). Characteristics of informal learning include activities that are “intentional but not highly structured” (Marsick & Watkins, 2001, p. 25) and take place during daily activities. Informal learning usually happens “…when people face challenges, problems, or unanticipated needs” (Marsick, Volpe & Watkins, 1999, p. 4).

Marsick, Volpe and Watkins (1999) characterized informal learning as “(a) integrated with work and daily routines, (b) triggered by an internal or external jolt, (c) not highly conscious, (d) haphazard and happens by chance, (e) an inductive process of reflection and action, and (f) linked to learning of others” (p. 90). Gola (2009) and Cseh (1998) have found that context is a significant factor in informal learning, as “informal learning is often experiential learning which occurs in a particular context” (Gola 2009, p. 344). Marsick and Watkins (2001) concurred, stating that informal learning “takes place without much external facilitation or structure” (p. 30). To enhance informal learning, three conditions are proposed by Marsick and Watkins (2001): critical reflection on surface tacit knowledge and beliefs, stimulation of
proactivity on the part of the learner to actively identify options and to learn new skills to implement those options or solutions, and creativity to encourage a wider range of options.

There are advantages to informal learning. A combination of the right environment and context can support and impact a learning environment (Malcolm, Hodkinson, & Colley, 2003; Cofer, 2000). Through focused reflection and action, informal learning can support the organization in various ways when creating learning strategies to work with vulnerable consumers. Most significantly, organizations can use informal learning to shift old behaviors and negative mindsets that may have held them back and resulted in adverse consequences in their marketing practices (Malik, 2015).

Experience is an essential part of what, when, and why adults learn, as explained by andragogy, which is the art and science of facilitating adult learning (Knowles, Holton & Swanson, 1998; Merriam & Caffarella, 1999). Although Avon Products (1985) suggested that learning opportunities at the ‘teachable moment’ are especially scarce, we propose that organizations can purposefully create these opportunities with consumers. As such, our discussion will focus on learning strategies in which an organization utilizes informal learning techniques with vulnerable consumers.

**FIGURE 1. CONSUMER LEARNING ADAPTIVE STRATEGY PROCESS FOR POWER ALIGNMENT**

A FRAMEWORK FOR LEARNING STRATEGIES TO DEVELOP CONSUMER COMPETENCE

The benefits of utilizing learning strategies have long been recognized in strategic planning (Mintzberg, 1973). We define a learning strategy as a dynamic approach to address the changing needs of the marketplace, the organization, or its stakeholders. Devising a learning strategy begins with the firm examining consumer data of a potential market to determine if there is an imbalance of power that could marginalize vulnerable consumers. If there is not a potential for harm, there would be no need for the firm
to develop a learning strategy and thus, a typical strategy could be implemented. However, if the examination reveals an imbalance of power, the firm would then identify the incompatibilities between the firm and the consumer. Essential to any eventual change in behavior is the firm’s willingness to accept accountability for the imbalance of power. The process concludes with the development of strategies that increase the competence and expertise of vulnerable consumers and as a result, do no harm. This process will lead to an organizational change in the routines of the organization, and over time, a better alignment between the organization competence and consumer competence will be realized.

Consider Figure 1. The inside of the figure depicts a consumer learning strategy process based on the power relationship.

Following are five learning strategies, developed from adult learning theory, which can be utilized by HRD professionals to help organizations to build the competence and trust of vulnerable consumers:

1. HRD professionals can accentuate the need for organizations to set aside and publicize times and/or days when less powerful consumers can receive special attention and access to information, informally through conversation and direct access to organizational representatives, rather than simply handing out informational brochures in a less personal manner. For example, representatives from an organization go to senior citizen communities to provide informal learning opportunities about their products and services. Feedback from these sessions would be shared with the organization to address any concerns and potential vulnerabilities that the consumers might express. This effort can be combined with other efforts to attract the targeted vulnerable market (senior discount days, other discount programs, etc.).

2. HRD professionals can emphasize the importance of focused training and performance evaluations within their organization. They should address any predispositions in the providers to ensure that their biases do not negatively affect the consumer experience. For example, when representatives that work directly with vulnerable considers, they should be made aware of their positionalities when it comes to consumers’ age, race, appearance, dress, speech, etc. Moreover, they should establish written guidelines based on local research to ensure that those vulnerable groups and individuals in their community receive equal treatment that is accessible and appropriate to their circumstances.

3. HRD professionals can urge organizations to focus more on educating and less on selling. Once consumers have been educated, formally or informally, selling well-being approaches and medication must be done judiciously. The opportunity to serve vulnerable consumers should involve much more than making a sale, but should also ensure long-term repeat business based on trust built through education.

4. HRD professionals can highlight the need for organizations to support vulnerable consumers to be proactive and identify additional ways to gain information. One example would be to have an informed, trusted agent accompany them when visiting a location to purchase goods or services. These agents can assist the organization in understanding the needs of the consumer as well as ask pertinent questions and translate for both the organization and the consumer to ensure that the services satisfy the consumer’s learning needs.

5. HRD professionals can encourage organizations to address conflicts of interest and create transparency. Reassuring the consumer formally and informally by explaining and demonstrating the utilization of non-biased resources such as technological products and services offered by companies that have a vested interest in an industry. In addition to communicate and disclose any
relationship or vested interest they have in the industry, particularly in dynamic industries where technology can quickly render medical products obsolete and or can harm the consumer.

SUMMARY AND CONCLUSION

Organizational change that creates ethical strategies brings authenticity, legitimacy, and ultimately trust to customer relationships. Consumer learning strategies that are geared toward vulnerable consumers play a key role in establishing this landscape of organizational trust. We acknowledge Andreasen’s (1993) argument that there are always merchants who will take advantage of consumers and willingly deceive them. We propose that in today’s society, organizations hold an ethical responsibility to do more to level the playing field for vulnerable consumers. As Andreasen (1993) argued, when consumers have problems in the marketplace, they turn most often to the seller, presenting organizations with an opportunity to educate vulnerable consumers so that those consumers can make informed decisions. Organizations help vulnerable customers become qualified consumers, or help vulnerable customers in ways compatible with their limited abilities and characteristics (Brenkert, 1998).

We asserted that HRD professionals and organizational leaders have an ethical responsibility to less powerful individuals and groups. Although it will likely be challenging to know the competencies of those who seek services, it is important that they work with managers and the ethics/compliance office to understand their obligations and consider how their actions impact others (Trevino, 2007). For decades, organizational strategies and competitive marketing practices were implemented to create and retain customers at any cost, with little regard for whether they left these customers less well-off (Leonidou, Leonidou & Kvasova, 2013). As a result, institutions often failed to ensure that the social contract between the organization and its customers was upheld. At present, industries are utilizing sophisticated research methods to profile consumers, including those who might be considered financially and socially vulnerable. However, policy frameworks are insufficiently developed to determine how to protect vulnerable groups (Harrison & Gray, 2010).

Like others (Jones & Middleton, 2007; Murphy, 2010), we are not suggesting that organizational leaders abandon the target marketing concept, but rather implement consumer learning strategies using adult learning principles that address consumer vulnerability. In this paper, we argue that once a market has been examined and labeled as ‘vulnerable,’ organizations should hold themselves accountable to those consumers through consumer learning and marketing strategies that ensure not only that the market is unharmed, but that the consumers’ competence and expertise in the buying process are improved as a result of their marketing practices. As noted throughout this paper, our belief is that a consumer market (whether vulnerable or not) is only at a disadvantage if the organization puts it at a disadvantage. While we agree that consumers with less power are likely to be at a disadvantage when the buying process begins, we take exception to the notion that vulnerable stakeholders are inherently at a disadvantage. Instead, we propose that they can have an advantage in certain circumstances. For example, some HRD professionals can advocate for their companies implementing learning strategies to serve these consumers that may not be available to all of their customers. Thus, they may actually gain an advantage over ordinary consumers.

Furthermore, as evidenced by the framework presented in this paper, we are not advocating that HRD professionals and organizational leaders attempt to change consumer values. Instead, we argue that organizations should craft and implement strategies that hold themselves accountable and demonstrate an understanding of those values by addressing consumer competence and expertise.

From the organizational leaders’ perspectives, the positive publicity that could be gained from helping less powerful, vulnerable consumers are worth the effort. These consumers may come to embrace a more positive image of the company, resulting in repeat business as they gain power as consumers over each
transaction. Thus, the company can develop stronger customer relationships with each of the three types of consumers (powerful, average, and less powerful). Moreover, if socially conscious HRD professionals and organizations are able to empower the less powerful consumers, fewer firms will be able to continue to take advantage and deceive them in buying interactions.

REFERENCES


HAVE YOU VISITED THE NORTH AMERICAN MANAGEMENT SOCIETY WEBSITE? YOU CAN DO SO BY USING THE FOLLOWING URL: HTTP://MBAA-NAMS.NET/
Managing Human Resources in a 21st Century Knowledge-Based, Global Economy

Gyongyi Konyu-Fogel, Walsh College of Accountancy and Business Administration

Abstract: Globalization created many challenges for human resource managers in the 21st century. In today’s competitive, knowledge-based economy, organizations must develop, utilize, and leverage resources, people, and technology across cultures and countries. Success is greatly influenced by human talent and capacity for organizational learning and responsiveness. By taking a pro-active, strategic role, human resource managers can develop organizational capabilities that can help improve performance and build a sustainable competitive advantage. The paper examines strategy and structure and the role of human resources in developing organizational culture, capabilities, and composition of people. Recommendations are made for workforce alignment, knowledge management, and developing 21st century competencies.

Keywords: knowledge-based economy, human resource management, 21st century skills and competencies, workforce alignment, global workforce practices

INTRODUCTION

The global economy requires firms to transform themselves into companies that are able to compete with anybody, anywhere, anytime. This imperative means that companies must excel in a number of dimensions that create a new level of competitive advantages. Countries are competing with each other for a scarce and valuable human resource in much the same way they have previously competed for gold or oil. The decreasing number of people in developed countries between the ages of thirty-five and forty-five will not only create greater competition for viable workers, but will also increase the difficulty of succession planning (Global Talent Report 2011). These changes present several challenges for managers and HR professionals.

For most companies, their international success is largely determined by how well their human resource issues are handled. Human resource management must, therefore, redefine its role to become a more strategic of a factor in the organization.

In an economy that is changing fast and constantly, organizations are required to reduce costs, improve quality, and increase productivity. Identifying, recruiting, developing, and retaining talent in a knowledge-based economy is crucial for success. To accomplish these objectives, organizations need human resource management practices that are pro-active, challenging, rewarding, and engaging for employees in order to motivate them to contribute and assure a high level of performance.

LITERATURE

In our 21st century knowledge-based economy, it is critical to develop competitive capabilities to succeed in a global economy. This requires leaders to be able to make decisions from multiple points of views, utilizing collaboration, cross-cultural teamwork, and inputs from diverse stakeholders (Konyu-Fogel, 2014). Studies show that to be successful in a knowledge-based, global economy, human resource management should not be reactive but must be pro-active in developing the firm’s competitive strategy and organizational structure (Hansen, 2009). In managing human resources effectively, it is critical to develop management controls and coordination systems to assure a corporate culture that unites employees in the company’s goals, values, and priorities. Human resource management must be proactive to help the organization achieve an optimal competitive strategy with an appropriate organizational
structure. The ability to collaborate with cross-cultural teams can help leaders accomplish tasks and energize the organization for high performance (Osland & Bird, 2006). By collaborating, leaders can develop mutually beneficial relationships, form strategic alliances/partnerships, and facilitate networks with business and government organizations (Goldsmith, et al. 2003).

The strategic role of human resource management on organizational performance can impact a firm’s competitive position and human resource management practices. A well-defined company strategy must assure that the organization has the resources and capabilities (physical and material inputs, talented, motivated people, up-to-date job skills, equipment, technology, knowledge sharing networks, communications, and finances) that equip the company to compete successfully in the global marketplace (Vance & Paik, 2015).

There is a strong relationship between organizational strategy and structure. Company strategy determines how the organization plans to achieve its strategic objectives. To determine the strategy, it is necessary to first identify the organization’s core values and align these with the company policies. A firm may have a well-articulated strategy but may fail if its human resource policies do not help the organization implement the strategy effectively.

Organizational structures may vary based on the type of the organization, the priorities of management, industry characteristics, and the required tasks to be performed. The organizational structure of small firms usually is less formal and more decentralized than that of large firms. In large organizations, on the other hand, there is generally a more formal structure requiring employees to participate in meetings and following specific procedures to report work related problems. A centralized structure enforces certain controls from the main office headquarters which limits autonomy and decision-making at the foreign locations. A decentralized structure allows local managers to make local decisions, which generally helps the company become more effective in meeting local needs, managing the local workforce effectively, and adjusting to the differences in employment practices of the foreign country (Chen, 2007).

Strategic control is critical in all types of organizations as this ensures that the firm’s operations, employment practices, and management processes help accomplish the mission, goals and HR policy objectives. Management must develop a systematic and consistent strategic control system that is aligned to the firm’s overall strategy. In the 21st century global economy, it becomes necessary for leaders to help organizations maintain effective strategic controls over their operations. Human resource policies must be aligned to both the firm’s profit-maximizing strategy and the employment practices. Global companies need to adjust their human resource policies to meet differences in socio-economic, political, legal, and cultural environments of the various work units and locations in the foreign countries where firms have operations (Lepak & Gowan, 2016).

STRUCTURING FOR OPTIMAL PERFORMANCE

Organizational structure is an important strategic capability that is necessary for the firm to accomplish its goals and mission. Structure provides a system that regulates decision-making, authority, communication flows, and information processing within the organization (Garwin, 2000). The organizational structure outlines the relationship between senior and middle-managers, functional divisions, cross-functional areas, operational and administrative units, and employees and supervisors, indicating reporting requirements and lines of communication and decision-making. For achieving success in the 21st century, firms can choose among various types of organizational structures. One of the main considerations for an appropriate organizational structure should be how the structure may influence organizational performance. It is critical to choose the right type of organizational structure that fits the company objectives to develop a competitive strategy.
Recent trends indicate an emergence of networks with horizontal decision making such as the global transnational structure where local subsidiaries report to both area and product managers. However, in a transnational structure manager may face some challenges including conflicts or confusion that may result from reporting to two or more supervisors which could undermine the authority of one unit over the other unit. In the transnational structure, it is important to maintain frequent communication and coordination between product and area divisions to ensure close alignment to organizational objectives because if the goals of the two divisions are not aligned sufficiently, the organization can fall short of its optimal performance (Mierau, 2007).

THREE CS OF ORGANIZATIONAL COMPETITIVENESS

Barney (2002) noted that in order to gain and sustain competitive advantage in today’s global markets, it is necessary to develop core competencies that are difficult to replicate by competitors and can provide a sustainable advantage through product and process differentiation in the industry. Firms must take an inventory of their organizational culture, capabilities, and composition (3 Cs):

Culture: Organizational Values, Norms, Behaviors

Organizational culture is the pattern of shared values, behavioral norms, systems, policies, and procedures that employees learn and adopt. Culture influences workplace behavior greatly. New employees are often asked to participate in a company orientation program to assure that they learn the organization’s standards for acceptable behavior and employment practice. Organizational culture reflects the managerial thinking and priorities that are manifested in company strategy, management style, employee policy and practice. Effective organizations share open communication, sharing knowledge and information, develop problem solving capabilities through organizational learning, encouraging innovation, risk taking, and creativity, promote collaboration, cross-functional teamwork, and strategic alignment of performance standards, employee policies, and procedures with transparent leadership and management practices. Vance & Paik (2015) hold that cultures where employees share similar values and exhibit the same styles and preferences for behavior are strong, "tight" or homogeneous cultures whereas organizations with decentralized structure have "loose" cultures or several subcultures.

Research shows that firms that regularly make adjustments in their internal environments to match environmental changes are likely to outperform those whose culture is rigid and unresponsive to external factors (Cavusgil, Knight, & Risenberger, 2012).

Organizational culture is embedded in the collective mindset of its employees and it may be difficult to change. To change an organizational culture, organizational strategy and human resource management must be closely aligned through the redesign of an appropriate company reward system. Local and national cultures often influence company culture. Corporate culture greatly influences organizational behavior and workforce performance. As a strategic business partner, human resource managers need to measure the effectiveness of human resource policies and practices. As human capital is a necessary and critical component of the success of all organizations, assessing the value of human resources should demonstrate implementing effective human resource practices to maintain a high-quality, engaged workforce.

Capabilities: People as a Strategic Resource

The success of organizations increasingly depends on people-embodied know-how—the knowledge, skills, and abilities (KSAs) of an organization’s members. The KSAs are the foundation of an organization’s core competencies that can distinguish the firm from its competitors and deliver value to
customers. As a result, many firms are seeing the value of tailoring the training for their employees and helping them to develop personalized career paths.

**Composition: The Human Capital Asset**

The composition of the firm’s workforce is the result of the firm’s decisions about whom to employ externally and internally and how to manage different types of employees. Employees may occupy different segments in the firm’s organizational structure and employment matrix.

Strategic knowledge workers, such as R&D scientists and engineers, are employees linked directly to the firm’s strategy. Firms should make a long-term commitment to these people. Core employees constitute people with valuable skills but skills that are not particularly unique (salespeople). Usually, managers invest less training in these people and tend to focus more on short-term commitments with them. Supporting labor include employees who have skills that are less strategic in value to firms and are generally available to all firms (clerical workers). These workers are often hired from employment agencies. The scope of their duties is generally limited, and most firms invest less in these workers in training and development. Finally, alliance partners (attorneys or consultants) have skills that are unique but not necessarily related to a company’s core strategy. Companies tend to form long-term alliances with these partners.

**RESEARCH METHODS**

The purpose of this study was to identify human resource management practices that are critical for building competitive advantage in the 21st century. A mixed-research method was used to collect data through an online survey developed by the researcher. A random sample of business executives and human resource managers were invited for voluntary participation. The population consisted of professional network lists of Fortune 500 and Forbes’ Global 2000 firms. Respondents were able to withdraw from the study or refuse to respond to any questions of the survey without any penalty. Confidentiality of the participants was assured by direct, anonymous access to the host site via a limited access hyperlink. The hyperlink was sent to participants in an initial email, with follow-up email reminders sent after the first two weeks, and every three weeks for two months to maximize the number of responses. A total of 102 responses were received and analyzed.

**ANALYSIS AND RESULTS**

Analysis of quantitative data consisted of descriptive statistics of demographics and frequency distributions of the responses rated on a 1-5 Likert scale calculating means, mode, percentages, and standard deviation. The responses to open-ended questions, qualitative data, were transcribed and coded in NVivo 10 software program. First, the respondents’ statements were evaluated to identify patterns and similarities in content to develop main themes based on the frequencies of the responses (open coding). Second, the main themes were compared to the quantitative measures of leadership behavior (axial coding). Third, the results of the qualitative inquiry were evaluated against the quantitative findings for cross-validation.

**RESULTS**

Results of the mixed-research study are presented in three Tables. Table 1 shows a comparison of the quantitative and qualitative findings. According to the quantitative findings, HRM practices ranked the highest on the 1-5 Likert scale, where 1 = Never and 5 = Always, included: Planning, Coordinating, Leading, Motivating, Communicating, and Collaborating.
### TABLE 1
**HRM BEST PRACTICES FOR BUILDING COMPETITIVE ADVANTAGE IN THE 21ST CENTURY**

<table>
<thead>
<tr>
<th>Quantitative Findings</th>
<th>Qualitative Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Planning</strong></td>
<td></td>
</tr>
<tr>
<td>Assess opportunities, challenges, risks and competition in your business.</td>
<td>Develop long-term strategy by aligning organizational objectives with core competencies.</td>
</tr>
<tr>
<td>Analyze economic, political, social, and cultural factors that impact your business.</td>
<td>Understand political, economic, and cultural differences. Attention to detail &amp; organization. Willingness to understand varied points of views.</td>
</tr>
<tr>
<td>Solicit information from business units outside your home country.</td>
<td></td>
</tr>
<tr>
<td><strong>Coordinating</strong></td>
<td></td>
</tr>
<tr>
<td>Evaluate multiple points of view to resolve business issues.</td>
<td>Listen to multiple points of views.</td>
</tr>
<tr>
<td>Use production, marketing, or distribution systems outside your home country.</td>
<td>Develop products that fit the needs of different countries. Understand the political, economic, cultural practices of the countries in which business is intended to be conducted. Assess marketing programs by cultural differences.</td>
</tr>
<tr>
<td>Integrate supplier networks across different countries.</td>
<td></td>
</tr>
<tr>
<td>Share information and decision-making with executives in different parts of the world.</td>
<td></td>
</tr>
<tr>
<td><strong>Leading</strong></td>
<td></td>
</tr>
<tr>
<td>Develop organizational values that represent diverse perspectives among cultures and countries.</td>
<td>Human resource management must assure that the management and staff meet once a year face to face at different locations.</td>
</tr>
<tr>
<td>Delegate authority &amp; assign tasks across cultures and countries.</td>
<td>Adapt to changing situations. Think outside your geographic location and remember that you are just one small part of a bigger picture. Forward thinking.</td>
</tr>
<tr>
<td>Select and promote people from a global talent pool.</td>
<td></td>
</tr>
<tr>
<td>Engage in cross-cultural training and international staff development.</td>
<td></td>
</tr>
<tr>
<td><strong>Motivating</strong></td>
<td></td>
</tr>
<tr>
<td>Respect, appreciate, and praise the accomplishments of employees of different cultures and countries.</td>
<td>Build trust. Understand that everyone has something to contribute. Recognize that persons from different cultures need to be motivated, mentored, and rewarded very differently. Recognize that being different does not make something “right” or “wrong.” Use flexibility. Respect others’ views.</td>
</tr>
<tr>
<td>Use rewards and incentives that reflect the values, goals, and aspirations of employees from different countries and cultures.</td>
<td></td>
</tr>
<tr>
<td>Encourage, coach, and mentor people from different countries and cultures to work together to achieve goals and objectives.</td>
<td></td>
</tr>
<tr>
<td><strong>Communicating</strong></td>
<td></td>
</tr>
<tr>
<td>Seek the views of stakeholders from different countries and cultures.</td>
<td>Communication across cultures needs to be developed and executed with the highest priority. Openness. Respect for individuals, cultures, religions, and business practices. Appreciate diversity, inclusion, listen intently to understand meanings.</td>
</tr>
<tr>
<td>Respond to differences in business practices, cultures or country environments.</td>
<td></td>
</tr>
<tr>
<td>Participate in cross-cultural meetings, brainstorming, and other global information sharing activities.</td>
<td></td>
</tr>
<tr>
<td><strong>Collaborating</strong></td>
<td></td>
</tr>
<tr>
<td>Work with representatives of political, social, cultural or civic institutions in other countries.</td>
<td>Know your flock, understand your customers, employees, and factors that influence their choices.</td>
</tr>
<tr>
<td>Use networks across countries and cultures to achieve business objectives.</td>
<td>Understand that our infrastructure in the US is totally different than every place else so we must seek to understand. Listen first, speak later.</td>
</tr>
<tr>
<td>Develop partnership, alliances or ventures with companies in other countries.</td>
<td></td>
</tr>
</tbody>
</table>
Responses to the open-ended questions indicated similar findings to the quantitative measures. Comments made by participants included developing long-term strategy by aligning organizational objectives with core competencies. Other comments on human resource practices included: embrace diversity, respect traditions, understand differences in business environments, and show respect for traditions, cultural differences. These relate to the subscales of Motivating, Leading, and Communicating of the Leadership Behavior instrument. Developing learning communities and recognizing complimentary skills relate to Collaboration and Coordination, and understanding what motivates people across cultures, being flexible, exercising patience and sensitivity are important aspects of Motivating. Behaviors of deep listening, willingness to learn about differences, listen intently to understand meanings, exercise clarity and good communication among cultures/languages are also components of the Communicating subscale.

Table 2 presents the main themes on the most important HRM practices for building competitive advantage in the 21st century. Results of the qualitative inquiry seem to complement the quantitative findings indicating that, to function effectively in the 21st century, organizations need to develop strategies that incorporate planning, coordination, and collaboration among many constituents. The findings indicate that human resource professionals need to be able to manage diversity through understanding and adjusting to differences; use flexibility and sensitivity in the workplace; motivate and respect people; encourage frequent and open communication; and develop cross-functional teams and processes that are aligned to the strategic goals of the organization. Human resource professionals should be able to meet the needs of diverse stakeholders and be able to respond to multiple points of views effectively.

**TABLE 2**

MOST IMPORTANT HRM PRACTICES FOR BUILDING COMPETITIVE ADVANTAGE IN THE 21ST CENTURY

<table>
<thead>
<tr>
<th>Most Important HRM Practices Noted by Participants</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop long-term strategy</td>
<td>15</td>
<td>14.7</td>
</tr>
<tr>
<td>Align objectives with organizational core competencies</td>
<td>14</td>
<td>13.7</td>
</tr>
<tr>
<td>Understand differences in business environments</td>
<td>14</td>
<td>13.7</td>
</tr>
<tr>
<td>Be sensitive and flexible/show respect for traditions</td>
<td>13</td>
<td>12.7</td>
</tr>
<tr>
<td>Embrace diversity and appreciate differences</td>
<td>11</td>
<td>10.8</td>
</tr>
<tr>
<td>Open-minded, curiosity, willingness to learn</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recognize complimentary skills/build a global Learning community</td>
<td>10</td>
<td>9.7</td>
</tr>
<tr>
<td>Good communication across cultures/languages</td>
<td>8</td>
<td>7.8</td>
</tr>
<tr>
<td>Patience/deep listening/clarify goals and expectations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Understand what motivates people in different countries/cultures</td>
<td>7</td>
<td>6.9</td>
</tr>
<tr>
<td>Understand the disadvantages of ethnocentrism</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Be inclusive, participate in social and cultural events</td>
<td>5</td>
<td>5.0</td>
</tr>
<tr>
<td>Build a customer-centric organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Listen intently to understand meanings</td>
<td>3</td>
<td>3.0</td>
</tr>
<tr>
<td>Show integrity and don’t be arrogant</td>
<td>2</td>
<td>2.0</td>
</tr>
<tr>
<td>Total</td>
<td>102</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Table 3 presents examples of additional comments on best practices of leadership for 21st century management. This indicates a need for diversity and building learning communities.
**TABLE 3**

**ADDITIONAL COMMENTS ON BEST HRM PRACTICES IN THE 21ST CENTURY**

<table>
<thead>
<tr>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>I believe that all managers should attend training programs and seminars. In order to conduct business in the world today, employees need have continuous learning.</td>
</tr>
<tr>
<td>The next generation of executives must think strategically, understand differences and be able to integrate multiple points of views.</td>
</tr>
<tr>
<td>21st century HRM should focus on building a learning community.</td>
</tr>
<tr>
<td>HRM practices need to include motivating people, developing trust and respect for others.</td>
</tr>
<tr>
<td>Organizational development must be executed top-down. This should be a significant focus in the 21st century economy.</td>
</tr>
<tr>
<td>Human resource managers need to provide open communication at all levels, must show respect to people despite of differences and stay professional always.</td>
</tr>
<tr>
<td>From my experience, the key is and appreciating and accepting people and employees.</td>
</tr>
<tr>
<td>Open yourself to learning and understanding.</td>
</tr>
<tr>
<td>Do not be afraid to admit that you need to learn more, and if a mistake is made, admit it rather than covering it.</td>
</tr>
<tr>
<td>Positive attitude requires to stay open; Observe and listen to what others have to say.</td>
</tr>
<tr>
<td>Be patient when necessary, do not use quarterly thoughts.</td>
</tr>
</tbody>
</table>

In summary, the study found that human resource professionals need to develop open communication and organizational culture that accepts differences and shows a willingness to learn. The results suggest that training is important in developing core competencies. Also, having a positive, open-minded attitude is critical for success. In the 21st century, employees often work in complex environments. Organizations need HRM practices that can build core competencies in planning, coordinating, communicating, motivating, leading, and collaborating to build competitive advantage in today’s fast changing, complex environment.

**IMPLICATIONS TO HUMAN RESOURCE MANAGEMENT**

The recent downsizing in manufacturing employment have caused concerns for employee turn-over and retention, labor productivity, and company profitability (Kaufman & Miller, 2011). Employee morale may change drastically due to downsizing employees or withholding pay increases, freezing employee hiring, or the lack of promotion (David, 2011). Human resource professionals should consider the possible effects of changes on employee rights, work and family responsibilities, employee attitudes, and privacy issues.

When organizational structure and decision-making mechanisms are centralized, the ability to respond to change can be less effective solving problems or managing knowledge capabilities (Robbins & Coulter, 2007). Transferring knowledge is a critical factor in developing competitive capabilities. Human resource managers should facilitate the transfer of management and technical knowledge and expertise across the organization. This can allow firms to be responsive to changing needs and market conditions. Explicit knowledge is often shared among employees through company memos, documents, manuals, data, procedures, or company core values and principles. At the same time, tacit knowledge, could be difficult to express by words or specific statements, thus it may not be as easy to communicate. The "know-how" that derives from personal experience, “learning—by—doing,” usually encompasses specific experiences and skills of individuals that may not be explained specifically in written forms. However, it is critically important that organizations develop a capacity to transfer tacit knowledge by sharing experiences and encourage knowledge sharing at all levels.

Furthermore, to determine capabilities for building a competitive advantage, four specific criteria should be used: valuable, rare, difficult to imitate, and organized. People can be a source of competitive
advantage when they improve efficiency or effectiveness of the company. Value is increased when employees find ways to decrease costs, provide something unique to customers, or achieve some combination of these. To build a competitive advantage, human resource managers need to develop skills, knowledge, and abilities that are not available to competitors and cannot be copied by others. Organization of skills and knowledge requires integrated data platforms and HR practices that help identify talent deployment and utilization.

DEVELOPING KNOWLEDGE-BASED, GLOBAL COMPETENCIES

In the 21st century, employees must be able to understand the global complexities of business operations. It is necessary to be able to identify and analyze complex situations, solve problems, provide solutions to unforeseen situations, think creatively, and understand differences in work environments. Managers need to leverage people and resources, meet quality product standards, and respond quickly and effectively to changes in industry, customer needs, and often conflicting interests of multiple stakeholders. The 21st century work environment requires employees to learn skills in relationship management, communication, cross-functional team work, risk taking, and innovation. Human resource managers need to adhere to fair and ethical human resource management practices. To achieve effective relationship management, managers should provide appropriate incentives and rewards that are motivating and meet employee needs.

CONCLUSIONS

Human resource professionals should assist organizations develop people, resources, and capabilities to build competitive advantage in the global marketplace. Through strategic leadership, organizations should create organizational cultures and structures that develop human resources with 21st century competencies, fostering creativity, teamwork, and communication.

Furthermore, knowledge sharing in the 21st century must be facilitated by open communication, learning and transferring core competencies within the organization, and reward systems that acknowledge and promote employee contributions. Managers must encourage employees to share best practices by giving incentives, rewards, and direct compensations for employee contributions. Cross-functional teamwork and information sharing should be an important part of performance evaluations. When employees are not rewarded for disseminating knowledge at the organization, they do not have an incentive to contribute their expertise and skills to assist others at the workplace. To encourage knowledge transfer and best practices, management must develop an effective organizational structure and strong company culture that promote employee contributions, active engagement, and the sharing of best practices.

References


A Theoretical Model on the Effects of Voluntary Turnover on Organizational Performance

Lee L. Hisey, University of Louisiana at Lafayette
Jude Bumgardner, Louisiana State University

Abstract: This paper presents a two-fold theoretical model to explain the effects of voluntary turnover on organizational performance. First, we use the Phase Component to determine whether an organization is over or understaffed, or whether an organization utilizes its human resources optimally. Next, we use the Performance Component to describe how antecedents, organizational performance, and organizational phase affect an organization’s ability to compete in the market place.

PURPOSE OF THE STUDY

The purpose of this paper is to create a theoretical model to examine the effects of voluntary turnover on organizational performance. Voluntary turnover continues to be a difficulty for businesses in the 2000’s, as demonstrated by Morrow and McElroy. In their 2007 study, Morrow and McElroy investigated voluntary turnover as opposed to other forms of turnover, because voluntary turnover had the most dysfunctional effect on organizational performance. Therefore, this study attempts to describe through the use of a theoretical model how voluntary turnover affects an organization’s ability to operate.

The Resource Based View (RBV) offers one theory to describe the effects on an organization of losing an asset (Barney, 1991). The RBV describes not only the effects of asset loss on the organization’s performance, but also the effects of asset loss on relationships among assets. In addition, the RBV explains the temporal effects of voluntary turnover on organizational performance. Importantly, resources and their interrelations are time-specific.

Thus, this study also highlights the effect of losing a human resource (HR) within the context of the RBV. Burt (1992), Hitt et al. (2003), and Penrose (1959) maintain that HR and the relationships between the organization’s resources are inimitable and valuable. Further, scant research on voluntary turnover has led researchers to call for more studies on the effects of turnover on organizational performance (Hutchinson, Villalobos, & Beruvides, 1997; Staw, 1980).

The dual-component structure of this study operates as follows: (1) The Phase Component describes the relationship between an organization’s performance and the duration and/or frequency of voluntary turnover. (2) The Performance Component describes the effect that voluntary turnover has on that organization’s capacity to acquire resources, depending upon which phase the organization is in.

PHASE COMPONENT

The Phase Component (Figure 1) depicts potential organizational phases, depending upon how voluntary turnover impacts the organization. This component incorporates earlier work performed by Abelson and Baysinger (1984) on the effects of turnover on an organization’s performance (p. 334). The Phase Component used in this study, however, differs from the Abelson and Baysinger (1984) model in that it targets voluntary turnover. Voluntary turnover, or resignation, is distinct from other measures of labor instability in that the employer has little control over voluntary turnover. Abelson and Baysinger (1984) maintain that future research on turnover should focus not on the optimum rate of turnover, but rather on statistically significant deviations from turnover. Since the data on turnover indicates that voluntary turnover is a deviation from the optimum rate of turnover, the study of voluntary turnover is consistent...
with the call for further research. Therefore, the Phase Component draws from earlier work on the effects of voluntary turnover on organizational performance.

In addition, the Phase Component plots organizational performance relative to voluntary turnover. Adding to the earlier work performed by Abelson and Baysinger (1984), the frequency and length of voluntary turnover is charted against organizational performance. Figure 1 below shows that, in each of the four phases displayed, there is variation in the level of performance exhibited when met with an increase of voluntary turnover. Phase II indicates that a small increase in the performance of the organization will occur with an increase in voluntary turnover. Phase I indicates that a small decrease in organizational performance may be expected with an increase in voluntary turnover. Phase IV indicates that a large decrease in performance will occur with an increase in voluntary turnover. Finally, Phase III indicates that a large increase in performance will occur with an increase in voluntary turnover.

An organization in either Phases I or II, is near equilibrium in respect to resources and the demands placed on the resources. Thus, an organization in either phase I or II is under little stress indicating that few if any adaptations are required when an employee resigns.

Conversely, an organization in Phase IV will be adversely affected by the loss of the employee. This result is depicted by the reduction in organizational performance coupled with an increase in voluntary turnover. Theoretically, an organization in Phase IV must replace the resource (i.e., hire part time help, hire temporary help, or hire a full-time replacement), or employ new or additional technology (i.e., machinery or automation) to replace the lost employee to avert adverse effects on organizational performance. In Phase IV, loss of the employee is detrimental to the performance of the organization.

Finally, Phase III indicates that an organization may experience an improvement in performance due to the voluntary turnover of an employee. An organization in Phase III should reexamine hiring policies to determine why the loss of an employee improved organizational performance. Such an examination may reveal that the organization was over-staffed or top-heavy, perhaps causing a bottle-neck in communication.

**PERFORMANCE COMPONENT**

Voluntary turnover may lead to a reduction in performance due to the loss of personnel. However, the effect will not be the same for all employers. The antecedents and performance factors that affect the organization will combine to mediate or moderate the effect that voluntary turnover has on organizational performance.

Figure 2 depicts the Performance Component. This component reflects organizational, employee, and environmental factors that affect the organization. These factors are antecedents that exist prior to voluntary turnover of the employee. Examples of antecedents are the employees’ position in the organization and how easily the employee may be replaced.

In addition, environmental factors such as the frequency and length of the turnover may affect how a firm responds to the loss of HR. Further, the market in which the employer competes may affect the adaptive response of the employer. A firm that competes in markets where there is a high demand for employees with specialized talents, such as technical skills and managerial talent are potentially the most adversely affected by voluntary turnover.
The Performance Component (Figure 2) consists of three parts. First, Antecedents affect the organization’s capacity to adapt to the loss of an employee, which is determined by the value of the employee, whether the organization can replace the employee, and how adaptable the organization is. Second, is the Organizational Performance section of the component which describes the phase of the organization. Third, the component culminates in the Resource Based View of the firm.

**ANTECEDENTS**

1. **Internal environment** – Internal environment refers to the social setting in an organization that affects employee morale. Extant literature proposes that there is a positive association between employee morale and organizational performance (Hom, Katerberg, Hulin, 1979; Kopelman, Brief, & Guzzo, 1990; Rosen, Levy, & Hall, 2006).

2. **Employee’s Position in the Organization** – The employee’s position in the organization pertains to social and human capital. For example, position in the organization might involve the employee’s effect on communications within the organization. In other words, is the employee a gatekeeper for an executive officer within the organization? In addition, does the employee have technical knowledge that no one else in the organization has? Does the employee have a relationship with a customer or customer base that cannot be replaced by another individual? Finally, does the employee have specific skills that are not easily replicated by the organization (i.e., pilot, surgeon, special licenses, or mechanical abilities)?
3. External Environment—External environment refers to the effects of the labor market on the firm during a voluntary turnover event. If the market in which the organization competes is depressed, then the loss of an employee might be beneficial to the firm by reducing the cost of labor. Conversely, if the firm is experiencing an up market, then losing employees could be deleterious to the firm’s performance.

ORGANIZATIONAL PERFORMANCE

The section of the Performance Component that follows the Antecedents is the Organizational Performance section, which describes the effects of voluntary turnover on the organization’s performance. Further, the Organizational Performance section of the Performance Component delineates which phase the employer will fall into relative to the effect that voluntary turnover has on the organization’s performance.

Literature supporting the moderating effect of voluntary turnover on the organizations ability to compete includes: Burt, 1992; Carmeli, 2004; Conner and Prahalad, 1996; Glebbeck and Bax, 2004; Morrow & McElroy, 2007; Penrose, 1959; Steers and Rhodes, 1978. In addition, product quality can be adversely affected by voluntary turnover (Anderson et al, 2004; Cantarello, Filippini, & Nosella, 2012; Hisey, 2012; Hisey, 2016; Mittal, Anderson, Sayrak, & Tadikamalla, 2005; Lapre and Tsikriktsis, 2006; Rust and Chung, 2006). Adaptations to augment product quality may include training of replacement employees, business development policies, and the use of teams to maintain customer satisfaction. Additionally, engineering procedures may be used to improve quality by automating processes that are affected by the loss of an employee.

In addition, voluntary turnover may affect employee morale, which in turn affects organizational performance (Hosmer and Kiewetz, 2005). Further, the organization’s financial position may also be compromised by voluntary turnover (Anderson et al, 2004; Gruca and Rego, 2005; Mittal et al, 2005; Morrow & McElroy, 2007; Rust and Chung, 2006). Finally, loss of employee assets may have a deleterious effect on the organization’s output (Bhavani and Tendulkar, 2001; Hutchinson, et al., 1997; Koys, 2001; Morrow & McElroy, 2007) and information sharing within the organization (Abelson and Baysinger, 1984; Clarke and Herrmann, 2004). Thus, instances where turnover has the greatest effect on the firm’s performance (Figure 1) falls in to either Phase III, mediating effect on organizational performance or Phase IV, moderating effect.

RESOURCE BASED VIEW

The Antecedents and Organizational Performance effects on the organization culminate with the Resource Based View (RBV) of the firm. The RBV of the firm states that for a resource to have value, it must be rare, inimitable, and irreplaceable (Barney 1991). Extant literature indicates that HR meet all of Barney’s requirements. Thus, voluntary turnover may either moderate or mediate the organization’s performance depending upon the phase that the organization is in.

CONCLUSION

The Phase Component and the Performance Component collectively comprise the Theoretical Model, which highlights the effects of voluntary turnover on the organization. In describing the turnover phenomenon, the suitability of the model is derived from the use of several studies that measured the effects of resource acquisition on organizational performance and the incorporation of previous research on voluntary turnover. Finally, the effects of voluntary turnover on organizational performance rests upon (a) how valuable the employee is to the organization, (b) the environment in which the organization
operates, (c) how replaceable the employee is, (d) whether alternative assets can replace the employee, and (e) the internal dynamics of the organization.

**SIGNIFICANCE OF THE THEORETICAL MODEL**

The Theoretical Model may assist in establishing policies to prevent the adverse effects of voluntary turnover on organizational performance. In addition, antecedents in the model may enable practitioners to correlate specific strategies to a pre-turnover level of organizational performance, thus providing management with a tool to reduce organizational downtime due to the loss of the employee.

Moreover, government officials may use the model to target employers who are most adversely affected by voluntary turnover. Finally, the model should enable practitioners to pinpoint specific areas within the organization that are most susceptible to the adverse effects of voluntary turnover or areas in the organization that are chronically overstaffed.

**FUTURE STUDIES**

Based on the call for additional studies in voluntary turnover, future studies should concentrate on describing employers by headcount, market served, strategy employed to adapt to employee-loss, and the length of time required to bring the organization’s performance back to a pre-turnover level of performance. In addition, future studies should describe the perceived effects of voluntary turnover on changes in customer satisfaction, employee behavior, and changes in product or service output. Finally, future studies should determine if a relationship exists between organizational type and the strategy used by the organization to adapt to voluntary turnover, and should determine if a relationship exists between time required to bring the organization’s performance back to its pre-turnover level of performance and the strategy(s) used by the organization to adapt to the loss of the employee.
REFERENCES


Motivational Theories Exemplified in *School of Rock*

Mary Kovach, Miami University

Abstract: The primary purpose of this manuscript is to identify four contemporary motivational theories and demonstrate how each of these theories can be applied in current everyday situations. The intention of connecting these theories to relatable scenarios is based on a case study developed specifically for undergraduate business students. The majority of these students have not previously been exposed to these theories. The four motivational theories - including 1) Abraham Maslow’s Hierarchy of Needs, 2) David McClelland’s Needs Theories, 3) J. Stacy Adam’s Equity Theory and 4) Victor Vroom’s Expectancy Theory (Bolman & Deal, 2008, and Jones & George, 2015) - are discussed at a high level to demonstrate how they can be applied in this scenario. This alternative approach to deliver a case study in this manner increases students’ attention and showcases how theories can be applied in situations that would not otherwise be recognized by many undergraduate students.

By selecting a relatable, contemporary movie (*School of Rock*), students were responsible for identifying components of each of the motivational theories and explaining how these theories were demonstrated throughout the movie. This manuscript, however, intentionally does not provide the details of the case study. It includes the identification, definition, and discussion of motivational theories and exemplifies how various scenes, situations and character development can exhibit these select motivational theories.

**Keywords** – Motivation theories, Maslow’s Hierarchy of Needs, McClelland’s Need Theories, Adam’s Equity Theory, Vroom’s Expectancy Theory, leadership, management, case study

INTRODUCTION

The article “Transcending the power of hierarchy to facilitate shared leadership” (Barnes et al., 2012) published in the *Leadership & Organization Development Journal* inspired the research and conception of this manuscript. It discusses leadership theories and applies them to the Grateful Dead’s Jerry Garcia. This manuscript demonstrates how various motivational theories can be applied to the 2003 movie, *School of Rock* (Rudin 2003). The premise of the movie is that a musician (Dewey Finn) has been kicked out of a band he founded. Through a series of random events, Dewey becomes a substitute teacher at a very prestigious elementary school. The class that he is assigned to instruct exhibits strong musical talent, from which he hopes to capitalize through a popular annual band competition. The character of Dewey Finn evolves from a sluggish, unemployed mooch to a relatable, encouraging and motivating leader.

For undergraduate business students who are learning about motivational theories for the first time, the movie *School of Rock* is used to demonstrate various theories in everyday life, more applicable to students. A case study was developed as a learning assignment to aid in students’ ability to recognize such theories, evaluate scenarios, compose intelligent responses, analyze perspectives and illustrate subject understanding.

MOTIVATIONAL THEORIES

**Maslow’s Hierarchy of Needs**

In the 1943, psychologist Abraham Maslow hypothesized that every person, regardless of demographic, inherently exists a hierarchy of five needs (Robins & Judge, 2009). Known as Maslow’s Hierarchy of Needs, this theory suggests that once the initial need is satisfied, each of the four subsequent needs follow; after a need is partially or fully satisfied, the subsequent need becomes dominant. If a need is satisfied, it is no longer motivating, and the subsequent need becomes the motivator (Nickels, McHugh,
McHugh, 2009). However, some “research does not support (his) contention that there is a need hierarchy or his notion that only one level of needs is motivational at a time” (Jones & George, 2015, p. 305). The first two needs are more basic and identified as “lower-order needs” while the remaining three needs are considered “higher-order needs” (Robbins & Judge, 2009).

The first identified need level is the psychological need category. The needs within this level account for basic human survival, including food, water, shelter and other bodily requirements. Once this need is (partially) satisfied, one develops a desire for the second level in Maslow’s need hierarchy. The second level is identified as the need for safety. This not only includes a craving for a safe environment (both at home and in the workplace), a sense of security as well as financial, familial, professional and medical stability (Jones & George, 2015). Moreover, “security” encompasses the absence of physical, emotional and spiritual harm could be categorized within this level (Robbins & Judge, 2009).

Within the higher-order needs, social or belonging is the lowest level, which is the longing to be accepted within a given peer group, interpersonal relationships, affection and love (Robbins & Judge, 2015). The subsequent need is identified as esteem, which is the need “to feel good about oneself and one’s capabilities, to be respected by others, and to receive recognition and appreciation” (Jones & George, 2009, p. 306). The highest need within the hierarchy is self-actualization. Desire to fill this need incorporates one’s drive to reach his/her fullest potential, subject to that individual’s definition of success.

In the movie School of Rock, this section of the manuscript examines the process in which Dewey Finn progresses through Maslow’s hierarchy of needs. Initially, Dewey obtains a substitute teacher position as a result of an overarching need to pay his rent and meet his basic human needs. During the first class, Dewey asks the students to share any food they have. As time progresses and Dewey is earning a steady pay, he begins to feel a sense of job security, financial security and safety. At this point, his lower-order needs are met, and he begins to feel a desire for belonging. Dewey begins to bond with several of his students. For example, he shares personal experiences regarding his weight with Tamika, who is a self-conscious adolescent; he makes it his mission to ensure that Freddie is not being harmed and pulls him away from his new-found friends in a van; he shares lessons about standing up and not getting pushed around to help Zack share his musical passion with his father, and is later praised by Zack for the lesson. Dewey’s relationship with Ned, his roommate, further develops as he shares his passion and drive with him. As this level is satisfied, Dewey is then motivated by his desire for esteem. He begins to serve as a role model for his students, recognizing each of their talents and creating positions within his newly-found class band to encourage their strengths, demonstrating teamwork and providing praise. Dewey not only achieves self-actualization by his class being selected to participate in the annual band competition, but the class is called out for an encore performance, in which Dewey dives into the audience for his ultimate crowd-surfing experience.

**McClelland’s Theory of Needs**

Psychologist David McClelland developed a theory that focused on three needs: the need for achievement, the need for power, and the need for affiliation (Robbins & Judge, 2009). He believed these three needs helped explain the root of motivation. The need for achievement is one’s inherent desire to exceed expectations, to be successful when encountering challenging tasks. In general, high achievers prefer planned environments in which they have a 50/50 success rate (181). McClelland’s need for power uncovers the idea that someone can construct an atmosphere where others behave in a manner in which they would not normally have conducted themselves (180). Studies have found U.S. presidents with a high need for power are effective as they serve their terms (Jones & George, 2015). Lastly, the need for affiliation is the draw to be likeable and to maintain strong interpersonal relationships with little or no conflict. Those in authoritative positions may have difficulty executing projects if there is a degree of conflict within their team if they possess a high need for affiliation.
In *School of Rock*, Dewey’s initial need for achievement was relatively high as it related to his music career, at the sacrifice of his life’s basic necessities. As the movie progressed, the character developed. Through the hard work of the students, excitement and improved musical talent, the end goal of winning the battle of the bands became much more realistic. Roles were assigned, practice times and band uniforms became a high priority. Dewey’s need for achievement began to grow in parallel with the students’ expectations.

Dewey maintained a high need for power. With the initial band he created, he designated himself as the leader. In his role as the substitute teacher, he was naturally the leader by his position within the organizational hierarchy. Additionally, Dewey was the dominant personality in his friendship with his roommate Ned. When Ned’s girlfriend came into his life, Ned’s tolerance of Dewey’s mischievous behavior diminished as his girlfriend’s opinion of Dewey grew unfavorably stronger. Moreover, this dissension between the two was amplified.

Dewey also had a relatively high need for affiliation, as it appeared as though his happiness fluctuated as this need was or was not fulfilled. He was visibly hurt throughout the movie when experiencing negative feedback regarding his early habits as a musician, whether by his peers, roommate or complete strangers. To satisfy his need for affiliation, he developed strengths and became more self-aware. When creating the band with his students, he capitalized on their talents, developed personal relationships with each of them and assigned tasks that both were good for the band and allowed each student to feel valued.

**Adam’s Equity Theory**

In the late 1960s, behavioral psychologist J. Stacy Adams developed a theory that said one’s motivation was dependent on perceptions of fairness that the inputs are relative to the outputs (Jones & George, 2015), meaning, there is a direct correlation between input and the expected outcome. Therefore, if one puts forth a high degree of effort, the outcome (or reward) will be relatively high - the old idea that hard work pays off.

Dewey knew competition would be difficult not only to get selected to participate in the battle of the bands but also within the competition itself. He developed a daily regimen for each of his students to be successful, including practicing songs and providing examples for students to review, listen to or apply. The competition would consist of bands that have played together significantly longer together and overall, had much more experience. Dewey felt as though it was his responsibility to provide the students with as much background, practice time and mentoring to provide the best outcome for the students.

**Vroom’s Expectancy Theory**

Victor Vroom developed a motivational theory that articulates why one is motivated based on outcome alone. His theory states that the expected outcome will dictate the amount of effort one puts forth, as it relates to a given task or goal (Nickels, et al., 2009). Vroom believes that if someone believes that they can accomplish the task and they believe the reward (or expected outcome) is worth the effort, they will be motivated to complete the task. However, if someone does not feel they can accomplish the task or that the reward is worth the effort, they will not be motivated to complete the task. The assumption made is that the person is capable of completing the task based on “ability, rationality, intelligence and task understanding” (Mangi, et al., 2015, p. 55). Moreover, the theory exemplifies one’s concern not only for his/her own reward, but what others receive, in comparison to their own output (Ehiobuche, 2012).

Because the students collectively felt winning the competition was achievable and believed winning the competition would be congruent with their goals in getting into top schools, they experienced a successful outcome. While they did not win first place in the competition, they did however, earn an encore
performance and crowd favorability. Each of the students felt he or she could be successful in their individual roles and demonstrated high motivation to win the competition.

PEDAGOGICAL BENEFIT

In Yazan’s (2015) comparison among three case study approaches, she identifies Robert Starke’s definition of a qualitative case study, which states that it “is a ‘study of the particularity and complexity of a single case, coming to understand its activity within important circumstances’ (p. xi)” (Yazan, 2015, p. 148). Motivational theories when initially introduced can be relatable to students but also overwhelming when trying to identify, understand and apply each theory accordingly. This delivery creates a more dynamic environment and encourages participation. One of the factors for the creation of this type of case study was student intimidation, based on an observed behaviors. For classes where scholarly case studies were presented to students at a regional college campus, some students did not participate in the assignment. After further discussion, the idea of reading a scholarly article and/or case study was so intimidating - that students self-selected out of the assignment rather than participating and making an effort.

The intention is to introduce early students to case studies with the idea of an alternative delivery method that leads to the same outcome as a case study that is traditionally delivered. Business courses should provide students with the opportunity to develop multiple skills that can be translated into various disciplines. Many “college students have no sense of reality of the business world and lack an understanding of what it means to be ready to enter the work world” (Ingerson & Bruce, 2015, p. 3). Upon college coursework completion, students need to be able to apply theories learned in the classroom to real-life scenarios, even as first-time employees. This delivery allows for such an outcome. Nearly unanimously, student feedback is overwhelmingly positive, demonstrating enthusiasm about the assignment as well as comprehension of the material.

CONCLUSION

The intention of the development of this case study is for students to be able to take scholarly theories and understand how they are applicable in their lives today. As managers in the marketplace, students will need to understand how to motivate their employees, provide methods in which to motivate employees, and recognize how their actions may be perceived by their employees, peers and other organizational leaders. Regardless of the disciplines students select to study or the industry they choose to work, these theories remain applicable and useful. Industry experience indicates “behavioral scientists such as Abraham Maslow… have shown that virtually every person has a hierarchy of emotional needs, from basic safety, shelter, and sustenance to the desire for respect, satisfaction, and a sense of accomplishment. Slowly these values have appeared as the centerpiece of progressive company policies, always with remarkable results” (Waterman, 1994, p. 92), according to the Federal Express Manager’s Guide for employees (Bolman & Deal, 2008). This methodology can walk students through these emotions as they learn an alternative manner in how to learn (Angelo & Cross, 1993).

While Motivational theories were popularized in the mid-twentieth century, they are still very applicable and relevant today. While the Approach-Avoidance Motivational theory was not included in this case study, it was exemplified. This theory suggests that when one intentionally holds others’ self-interests in priority as compared to individual self-interests, motivation inherently increases (Impett, et al., 2014). As the movie progressed, Dewey’s character went from a man concerned only for himself to a man who genuinely cared for the well-being of his students, their success and their growth. A limitation to this manuscript is the depth in which each of the motivational theories are discussed. The intention is to provide another avenue by which to recognize, illustrate and demonstrate motivational theories in the classroom.
REFERENCES


Differences in Learning Outcomes Attributable to Face-to-Face Versus Online Delivery: Controlling for Instructor, Course Content, and Learning Objectives

Kevin G. Love, Central Michigan University
Katherine Kearns, University of Tennessee – Chattanooga
Bailee Mamayek, Central Michigan University

Abstract: Significant research exists which attempts to differentiate learning outcomes based on a face-to-face (FTF) versus an online course delivery yet do not control for course content, learning objectives, or instructor differences. Controlled for these and other variables within a management undergraduate course, FTF students reported significantly higher instructor favorableness, instructor effectiveness, gains in understanding, positive attitude development, satisfaction with the course, and course grades than online students. Online students reported significantly higher value for the course. Conclusions focus on the richness of the instructor-student relationship within the FTF learning context.

INTRODUCTION

In the last decade technological advancements have driven the development and delivery of higher education. Currently, total online, face-to-face (FTF), and hybrid (i.e., a blend of online and FTF) classes define the class delivery options in higher education (Duckworth, 2011; Mansour & Mupinga, 2007; Naghneh, 2012).

In 2002 there were an estimated 1.6 million students taking at least one online course (Allen and Seaman, 2007). While predictions were made that online courses offered by universities would eventually level off (Kaya, 2010), a decade later the number of students taking an online course had tripled to about 7.1 million (Kolowich, 2014; University of the Potomac, 2016). Colleges and universities continue to report that their highest enrollment increases occur in online courses and degree programs (Kaya, 2010). Given the economic efficiencies of online course delivery (e.g., lower administrative, facility, and instructor costs) colleges and universities are seeing greater profits with this delivery modality (Smith & Mitry, 2008). Coupled with this profitability, however, is a growing debate on whether the quality of online learning is comparable to that of FTF courses.

ADVANTAGES AND DISADVANTAGES OF DELIVERY MODALITIES

Advantages of online learning.

Both instructors and students report positive perceptions of course effectiveness of online learning (Seok, DeCosta & Tung, 2010). To understand the advantages of online learning, however, one must understand why it is needed and its growth in popularity over the past decade. Online courses have served as a convenience for students who are unable to make it to class because “life happens” (Milliron, 2010). The online platform allows for flexibility and easy access to information for the students, as well as asynchronous learning as they can do their work at a time and place that fits their schedule (Poston, 2014). According to The Chronicle of Higher Education Forum (2010), being able to work at one’s own pace allows people to learn at different rates and customize their learning by focusing on the information they feel they need more time with and less on a subject the teacher might think needs more special attention. Online courses also give students less chances to “fake” completing their assignments because
they are asked to submit original ideas and really think through questions posted by the instructor and/or fellow students (2010). In addition, simulations are often used to enhance lesson plans and reinforce knowledge to the students, in a new and innovative way, in some cases increasing the application and transfer of knowledge to the job (Hansen, 2008).

Poston (2014) states that the intimacy online learning offers motivates students to think at a deeper level, in a learning style suited to them, with less focus on tedious note taking, and giving more time allotted for actual learning. People who take online courses tend to be able to finish in a quicker amount of time than of those who take classes FTF because of the ability to do the course at their own speed (Milliron, 2010). Moreover, the performance levels for online learning tend to be higher than for that associated with the traditional classroom since the student gets to choose the time and place of when they want to study, know exactly what in the curriculum will be covered, and how long it will take to complete (Milliron, 2010).

**Disadvantages of online learning**

With each higher educational platform advantage there are also disadvantages. Since online learning takes place using internet-based technology, a significant amount of advanced technological knowledge is required in order for students to get through the course with few problems and/or complications (Poston, 2014). For example, with the use of technology it is very important for students to have an appropriate level of Internet speed (Milliron, 2010).

Specifically, common issues revolve around the little to no teacher or peer interactions inherent in online delivery. For example, it is easy for students to be “out of sight, out of mind” as to the due dates from the syllabus (Naghneh, 2012). Students frequently misunderstand course requirements, such as exams, quizzes, assignments, etc., which can lower grades and add frustration (Duckworth, 2011). Due to these and other common issues online courses have a higher dropout rate then FTF classes (Poston, 2014).

Other reported problems with online learning include: a lack of social interactions with professor-to-student and student-to-student relationships (Mansour and Mupinga, 2007); the accreditation of online classes and online degrees, that is, are they equal in value to FTF classes and degrees (Naghneh, 2012); the legal issue of copyrighted information through limitation as to the types of information instructors can and cannot show to their students through papers, PowerPoint, etc. (Mansour and Mupinga, 2007); and a limited range of courses, subjects, and degrees offered online (Poston, 2014).

**Advantages of FTF learning**

The traditional method of learning was and still is to many the “gold standard” of learning. One of the most prominent and superior aspects of FTF learning is its reliance upon personal social interactions between teachers, students, and the community (Mansour and Mupinga, 2007). Some researchers argue that it is superior for all types of learners: Visual, Auditory, Tactile, and Kinesthetic (Poston, 2014). Naghneh (2012) argues that since there is a physical connection, there is a better understanding of material, the class has more of a mental impact, and the students have a higher sense of accomplishment and satisfaction. Accordingly, with the ability to observe the professors body language, volume/tone, and the infliction for parts he/she deems important, the success of the average student increases (Poston, 2014).

Online students are held accountable for course completion and mastery of the information. For example, within a FTF course should a student forget or misinterpret deadlines and due dates they receive the information numerous times through visual and auditory means. In an online course, however, the student must bear sole responsibility to comprehend such information as transmitted electronically (Naghneh, 2012).
Disadvantages of FTF learning.

Although traditional FTF learning is the oldest learning platform it is not without its flaws. Within the tradition of FTF courses those are rules. For example, FTF classes are synchronous, thus more stringent on attendance at a certain time, in a certain place (Milliron, 2010). Students in FTF formats have less thoughtful answers and ask fewer questions, which may demonstrate their lack of enthusiasm for higher education (Naghneh, 2012). More time is spent on lectures and activities than meaningful group discussions and assignments (Milliron, 2010). FTF students demonstrate less self-discipline and less motivation towards their course work than online or hybrid students (Naghneh, 2012). And, obviously, taking courses FTF does not allow for student’s to: work at their own pace; focus on the topics for which they need extra time; or let them choose the best way for completing an assignment based on their learning style (Poston, 2014).

Advantages of hybrid learning.

Since hybrid learning is the blend between online and FTF learning it is able to use the advantages of both learning modalities while at the same time trying to alleviate the disadvantages of both. For example, it removes the component of isolation that occurs in online courses and allows for extended discussions outside of the physical classroom (Jeffrey et al, 2014). The extensive network inside a classroom and through online connections gives the students more access to each other as peers and for the instructor as well (Naghneh, 2012). Hybrid learning also allows for a complete and successful format for collaborative interaction amongst the students for questions and group projects. The course material can be directed at different types of learners and provides a variety that keeps students intrigued and active in learning the information (Mansour and Mupinga, 2007). Hybrid courses allow for students to thrive in their courses and obtain the most clarity, socialization, and consistency within the methods being taught (Poston, 2014). Naghneh (2012) concluded that the level of improved brainstorming, critical thinking, problem solving, and exchanging of ideas were highly contributed factors to why the hybrid classes out-performed those who took purely traditional or purely online classes.

Disadvantages of hybrid learning.

Even with the blend of FTF and online courses there are components that are not effective. For example, the development, design, and creation of a hybrid course takes a lot more time than a typical online or face-to-face class (Jeffrey et al, 2014). Hybrid courses lose some of the FTF interaction that students in a traditional classroom receive (Naghneh, 2012). With less face-to-face interaction, there is less opportunity for students to find and make study groups (Mansour and Mupinga, 2007). There is also less time for students to network and build relationships with other students and teachers because they lose the physical time in the face-to-face environment (Poston, 2014). The level of knowledge and skill each student needs to have as to how to use online resources and technology, while attending some class sessions and demonstrating active participation is a difficult balance (Naghneh, 2012). Other complications include: academic honesty, with online work it is quite simple for students to paraphrase other work and pass it off as their own (Milliron, 2010) and laws and regulations which keep hybrid classes from implementing innovations by limiting the resources they are allowed to share with the students in a virtual format due to copyright infringement (Mansour and Mupinga, 2007).

HYPOTHESES

Those who favor traditional face-to-face courses over online courses contend that there are many benefits in traditional FTF courses that cannot be obtained from online classes. Some argue that the delivery method should fit the content of the course (Savage & Bergstrand, 2013). Many of the benefits that students receive from FTF instruction revolve around the potential for richer and higher levels of
communication. For example, students are more easily able to ask the instructor questions, as well as listen to other student’s relevant questions. According to Hernandez, Gorjup, and Cascon (2010) there is greater potential for communication through the instructor’s body language as well as other opportunities to pick up on the instructor’s feelings that cannot be obtained through online course delivery.

Those who favor FTF courses claim that there are potential downfalls in taking online classes. Some of these disadvantages include an increased likelihood to fall behind in class material, and negative exam preparation behaviors such as cramming (Bergstrand & Savage, 2013). It has also been found that individuals enrolled in online courses often have incorrect perceptions of their performance when compared to FTF student performance perceptions. These beliefs were confirmed by Wilkinson and Crews (2009) where online and FTF students showed a difference in their perceptions of overall course performance. Their results also indicated, however, that exam scores were significantly lower for online students than for in-class students.

Other studies have found significant differences between the perception of the course itself, differentiating between online and FTF students. One study examining student perceptions found that students’ beliefs of how much they learned, instructor effectiveness, and overall course effectiveness were much lower in online courses than in FTF courses (Bergstrand & Savage, 2013). They also found that FTF students believed they were treated with more respect compared to online students (Bergstrand & Savage, 2013). Fortune, Shifflett and Sibley (2006) found that the amount of perceived learning in a FTF business communications course was significantly higher than the equivalent online course. Based on the aforementioned research, the following hypotheses were developed:

**Hypothesis 1**: The FTF course group median student ratings will be significantly higher than the online course group median for perceived instructor effectiveness.

**Hypothesis 2**: The FTF course group median student ratings will be significantly higher than the online course group median for perceived learning development.

Proponents of online courses argue that there are many advantages. Some of these benefits include increased autonomy, increased time management skills, and providing those who have work or family responsibilities the opportunity to obtain a degree (Bergstrand & Savage, 2013). Previous research supports a range of benefits associated with online courses.

Yet the majority of prior research conducted for the purpose of identifying differences in student outcomes between FTF and online courses found no significant differences in learning outcomes (Daymont & Blau, 2008). For example, a recent study conducted by Sussman and Dutter (2010) investigated online and FTF class performance outcomes and found no statistical differences in examination scores between the groups. Similarly Prater and Rhee (2003) found that there were no differences in overall performance between FTF student work groups and electronic collaborative student work groups. These studies support the following hypothesis:

**Hypothesis 3**: There will be no statistically significant differences in mean overall course performance between FTF and online students.

In order to gain a better understanding of the differences in perceived learning and actual course performance the present study was divided into two phases of analysis. The first phase addressed Hypotheses 1 and 2 by examining learning development and instructor effectiveness ratings. The second phase examined Hypothesis 3 by comparing the academic performance of FTF versus online students.
METHOD

Participants

The study used 145 undergraduate students from a large Midwestern public four-year university between the ages of 21-46 ($\bar{X}_{\text{age}} = 22$ years old). All of the individuals had completed an undergraduate course in organizational behavior. Both FTF and online sections of the course were taught by the same instructor, designed to meet the same course objectives, and used the same quizzes, examinations, and assignments. An end-of-course online survey of course-related student perceptions yielded samples of FTF students $n = 71$ and online students $n = 74$. Final course grades yielded samples of FTF students $n = 42$ and online students $n = 90$.

Instrumentation and Procedure

An online survey was used to assess student perceptions of instructor effectiveness and student learning development. The survey consisted of 40 items measuring a variety of student perceptions related course outcomes. Sample survey items include:

(a) *As a result of your work in this class, what GAINS DID YOU MAKE in your UNDERSTANDING of each of the following? – How knowledge of this subject area helps people address real world issues, etc.*

(b) *As a result of your work in this class, what GAINS DID YOU MAKE in the following SKILLS? – Developing a logical argument, etc.*

(c) *As a result of your work in this class, what GAINS DID YOU MAKE in the following? – Interest in taking or planning to take additional classes in the subject, etc.*

The response scale for (a) – (c) was *No Gains; A Little Gain; Moderate Gain; Good Gain; Great Gain; N/A.*

(d) *How much did the following aspects of the class HELP YOUR LEARNING? – Your peers in your class; Lectures or online modules; Opportunities for review; Online notes or presentations posted by the instructor; Explanation of why the class focused on the topics presented; Interacting with the instructor during class; etc.*

The response scale for (d) was *No Help; A Little Help; Moderate Help; Much Help; Great Help; N/A.*

(e) *Please indicate the level of AGREEMENT or DISAGREEMENT you have with each of the following statements. – There was a commitment to academic excellence in the course, etc.*

The response scale for (e) was *Strongly Disagree; Disagree; Neither Agree or Disagree; Agree; Strongly Agree; N/A.*

Perceived instructor effectiveness was measured by asking students to rate the professor’s “overall effectiveness.” The item used a five point rating scale with $1=$Very Poor to $5=$Very Good. Perceived Learning Development was measured using the mean five-point scale ratings across a series of items. These items asked for ratings regarding course content, learning integration, attitude development, and skill development. Academic performance was measured through the final course grade, as indicated on a traditional “A (Excellent)” to “F (Fail)” scale.
The instructor for both the online and FTF sections of the Organizational Behavior course was experienced in both delivery modalities, having 38 years as a tenured professor of management in a large public university located in the Midwest of the U.S. The instructor had experience in designing online courses and had completed the online teaching certification process offered through the university. The instructor had received both university and College of Business Administration awards for excellence in teaching.

RESULTS

Hypotheses-Related Findings

The purpose of these analyses was to determine whether or not the sample means/medians were equivalent. Given that the Instructor Effectiveness data was negatively skewed, a Mann-Whitney U test was conducted to evaluate Hypothesis 1, that the FTF students would rate Instructor Effectiveness higher than online students. The results supported Hypothesis 1, \( z = -3.251, p < .05 \). The mean \( z \)-score of Instructor Effectiveness for the FTF students was 84.45, while online students had a mean \( z \)-score of 62.01.

A Learning Development composite was created by taking the mean of four survey question responses which measured course content, learning integration, attitude development, and skill development. A \( t \)-test for unequal variances was conducted to evaluate Hypothesis 2 that FTF students would perceive higher levels of learning development than those of online students. The results were significant, \( t (137.47) = 2.114, p < .05 \), indicating that students in the FTF course (\( \bar{X}_{ftf} = 4.089, SD = 0.678 \)) rated their learning development significantly higher than those in the online course sections (\( \bar{X}_{online} = 3.816, SD = 0.867 \)). Thus, Hypothesis 2 was supported.

Overall academic performance was measured using the mean computed from three examinations, ten quizzes, and a graded written case project completed throughout the respective course term. Based upon a weighted course average, letter grades were assigned using a traditional scale, “A (Excellent)” through “F (Fail).”

There were significant differences in academic performance between FTF and online students, \( t (130) = 13.243, p < .05 \). Thus, Hypothesis 3 was not supported. The mean performance of the FTF students (\( \bar{X}_{ftf} = 90.36, SD = 6.76 \)) was significantly higher than that of the online students (\( \bar{X}_{online} = 70.71, SD = 8.42 \)). Given these findings a regression analysis was conducted in order to determine whether or not the delivery modality of the course was related to overall academic performance. The results of the linear regression analysis was significant (\( R = .758; p < .01 \)) indicating that the delivery modality of the course accounted for approximately 54.7% of the variance of student academic performance.

Post-Hoc Findings

In order to further explore the differences in attitudinal, behavioral, and academic learning outcomes between FTF and online students a series of additional statistical analyses were performed. While not falling within the context of specific study hypotheses, these analyses were able to describe in detail differences in measures due in whole or part to the course delivery modality.

**FTF versus online course differences: Attitude factors.**

Each section of the online survey was designed as a specific content grouping or attitude factor. Each factor was subjected to ANOVA where FTF or online delivery served as the independent variable. The dependent variable was a composite of survey responses within that factor. ANOVA is appropriate for
determining significant differences between two conditions, in the present study online and FTF course delivery. Within each factor groupings there were significant intercorrelations among the contributing survey items. This indicated that respondents provided similar responses within each category, such as “gains made in understanding.” Therefore, all survey responses for items within a factor grouping were combined into a single composite. The ANOVA analyses were performed using the composite factor data. In order to provide more detail as to the study findings, significant ANOVA findings using the item composite were followed by one-way ANOVAs for each of the survey items which were combined into that composite. The following presents a summary of these findings:

1. FTF students reported significantly higher positive agreement with favorable statements regarding instructor behavior \[ F(1,144) = 12.87, \ p < .01 \]. The specific sub-items which contributed to this difference are shown in Table 1.

### TABLE 1

<table>
<thead>
<tr>
<th>Perception</th>
<th>FTF Mean</th>
<th>Online Mean</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Posed questions</td>
<td>3.77</td>
<td>3.10</td>
<td>.01</td>
</tr>
<tr>
<td>Encouraged cooperation</td>
<td>3.64</td>
<td>2.90</td>
<td>.01</td>
</tr>
<tr>
<td>Encouraged deep thinking</td>
<td>4.38</td>
<td>4.04</td>
<td>.05</td>
</tr>
<tr>
<td>Fairly evaluated work</td>
<td>4.70</td>
<td>3.90</td>
<td>.01</td>
</tr>
<tr>
<td>Chose relevant assessment of knowledge</td>
<td>4.70</td>
<td>4.28</td>
<td>.01</td>
</tr>
<tr>
<td>Provided feedback</td>
<td>4.16</td>
<td>3.45</td>
<td>.01</td>
</tr>
</tbody>
</table>

Item Scale: 1=Strongly Disagree; 2=Disagree; 3=Neither Agree/Disagree; 4=Agree; 5=Strongly Agree

2. Online students rated the value of course components leading to completion of learning objectives significantly higher than FTF students \[ F(1,144) = 3.90, \ p < .05 \]. The specific sub-items which contributed to this difference are shown in Table 2.

### TABLE 2

<table>
<thead>
<tr>
<th>Perception</th>
<th>FTF Mean</th>
<th>Online Mean</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required materials</td>
<td>2.82</td>
<td>4.11</td>
<td>.01</td>
</tr>
<tr>
<td>Supplemental materials</td>
<td>2.54</td>
<td>2.92</td>
<td>.05</td>
</tr>
<tr>
<td>Papers and projects</td>
<td>3.53</td>
<td>4.03</td>
<td>.01</td>
</tr>
<tr>
<td>Group work</td>
<td>3.30</td>
<td>1.86</td>
<td>.01</td>
</tr>
</tbody>
</table>

Item Scale: 1=Did Not Have/Use; 2=Low or No Value; 3=Moderate Value; 4=High Value; 5=Very High Value

3. FTF students perceived greater positive aspects of instructor behavior, including perceptions of overall instructor effectiveness, than online students. (These survey items were taken from a questionnaire called the Student Opinion Survey which is published by the university and used for collecting performance data regarding faculty effectiveness and subsequently used in faculty
personnel decisions regarding retention, promotion, and tenure.) \(F(1,144) = 22.70, p < .01\]. The specific sub-items which contributed to this difference are shown in Table 3.

<table>
<thead>
<tr>
<th>Perception</th>
<th>FTF Mean</th>
<th>Online Mean</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Teaching helped me learn</td>
<td>4.58</td>
<td>3.62</td>
<td>.01</td>
</tr>
<tr>
<td>b. Treated students with respect</td>
<td>4.84</td>
<td>4.05</td>
<td>.01</td>
</tr>
<tr>
<td>c. Presented course material well</td>
<td>4.68</td>
<td>4.23</td>
<td>.01</td>
</tr>
<tr>
<td>d. Seemed well prepared</td>
<td>4.91</td>
<td>4.38</td>
<td>.01</td>
</tr>
<tr>
<td>e. Was enthusiastic about subject</td>
<td>4.96</td>
<td>4.24</td>
<td>.01</td>
</tr>
<tr>
<td>f. Overall effectiveness</td>
<td>4.80</td>
<td>4.28</td>
<td>.01</td>
</tr>
</tbody>
</table>

Item Scale - a - e: 1=Strongly Disagree; 2=Disagree; 3=Neither Agree/Disagree; 4=Agree; 5=Strongly Agree

Item Scale - f: 1=Very Poor; 2=Poor; 3=Adequate; 4=Good

4. FTF students reported significantly higher gains in understanding (i.e., thought processes) associated with the class content \(F(1,144) = 16.10, p < .01\]. The specific sub-items which contributed to this difference are shown in Table 4.

<table>
<thead>
<tr>
<th>Perception</th>
<th>FTF Mean</th>
<th>Online Mean</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand the main concepts</td>
<td>4.54</td>
<td>3.69</td>
<td>.01</td>
</tr>
<tr>
<td>Relate class to ideas encountered outside of the subject area</td>
<td>4.40</td>
<td>3.80</td>
<td>.01</td>
</tr>
</tbody>
</table>

Item Scale: 1=No Gains; 2=A Little Gain; 3=Moderate Gain; 4=Good Gain; 5=Great Gain

5. As stated above, significantly greater gains in attitude development (i.e., gains made in the class) were reported by FTF students as a result of their work in the class \(F(1,144) = 5.43, p < .05\]. The specific sub-items which contributed to this difference are shown in Table 5.
TABLE 5
GAINS MADE IN . . .

<table>
<thead>
<tr>
<th>Perception</th>
<th>FTF Mean</th>
<th>Online Mean</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enthusiasm for the subject</td>
<td>4.21</td>
<td>3.71</td>
<td>.01</td>
</tr>
<tr>
<td>Confidence that you understand the material</td>
<td>4.36</td>
<td>3.99</td>
<td>.01</td>
</tr>
<tr>
<td>Confidence you can do this subject area</td>
<td>4.36</td>
<td>4.01</td>
<td>.01</td>
</tr>
</tbody>
</table>

Item Scale: 1=No Gains; 2=A Little Gain; 3=Moderate Gain; 4=Good Gain; 5=Great Gain

6. FTF students reported that the graded assessments within the class significantly helped their learning, more so than online students \([F(1,144) = 12.06, p < .01]\). The specific sub-items which contributed to this difference are shown in Table 6.

TABLE 6
HOW MUCH DID THE FOLLOWING HELP LEARNING?

<table>
<thead>
<tr>
<th>Perception</th>
<th>FTF Mean</th>
<th>Online Mean</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunities for review</td>
<td>3.75</td>
<td>2.47</td>
<td>.01</td>
</tr>
<tr>
<td>Number and spacing of tests</td>
<td>4.09</td>
<td>3.53</td>
<td>.01</td>
</tr>
<tr>
<td>Fit between class lectures and tests</td>
<td>4.05</td>
<td>3.56</td>
<td>.01</td>
</tr>
<tr>
<td>Feedback on my work</td>
<td>3.65</td>
<td>2.82</td>
<td>.01</td>
</tr>
</tbody>
</table>

Item Scale: 1=No Help; 2=A Little Help; 3=Moderate Help; 4=Much Help; 5=Great Help

7. FTF students indicated that information sharing aspects of the class helped their learning significantly more than online students \([F(1,144) = 17.48, p < .01]\). The specific sub-items which contributed to this difference are shown in Table 7.

TABLE 7
HOW MUCH DID THE FOLLOWING HELP LEARNING?

<table>
<thead>
<tr>
<th>Perception</th>
<th>FTF Mean</th>
<th>Online Mean</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explanation why the class focused on certain topics</td>
<td>4.12</td>
<td>3.25</td>
<td>.01</td>
</tr>
</tbody>
</table>

Item Scale: 1=No Help; 2=A Little Help; 3=Moderate Help; 4=Much Help; 5=Great Help

8. When asked how much various aspects of the class helped their learning, FTF students reported significantly greater positive affect \([F(1,144) = 10.45, p < .01]\). The specific sub-items which contributed to this difference are shown in Table 8.
### TABLE 8
**HOW MUCH DID THE FOLLOWING HELP LEARNING?**

<table>
<thead>
<tr>
<th>Perception</th>
<th>FTF Mean</th>
<th>Online Mean</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interacting with the instructor during the class</td>
<td>3.68</td>
<td>1.33</td>
<td>.01</td>
</tr>
<tr>
<td>Interacting with the instructor (overall)</td>
<td>3.59</td>
<td>1.86</td>
<td>.01</td>
</tr>
<tr>
<td>Working with peers during the class</td>
<td>2.84</td>
<td>1.47</td>
<td>.01</td>
</tr>
</tbody>
</table>

Item Scale: 1=No Help; 2=A Little Help; 3=Moderate Help; 4=Much Help; 5=Great Help

9. FTF students reported more positive perceptions as to instructional effectiveness than online students \[F(1,144) = 11.49, p < .01]. The specific sub-items which contributed to this difference are shown in Table 9.

### TABLE 9
**IMPACT OF INSTRUCTIONAL EFFECTIVENESS**

<table>
<thead>
<tr>
<th>Perception</th>
<th>FTF Mean</th>
<th>Online Mean</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content was valuable</td>
<td>4.58</td>
<td>4.19</td>
<td>.01</td>
</tr>
<tr>
<td>Instruction was excellent</td>
<td>4.65</td>
<td>4.06</td>
<td>.01</td>
</tr>
<tr>
<td>Experiencing intellectual growth in the class</td>
<td>4.47</td>
<td>3.74</td>
<td>.01</td>
</tr>
<tr>
<td>Commitment to academic excellence in the class</td>
<td>4.59</td>
<td>3.78</td>
<td>.01</td>
</tr>
</tbody>
</table>

Item Scale: 1=Strongly Disagree; 2=Disagree; 3=Neither Agree/Disagree; 4=Agree; 5=Strongly Agree

10. With regard to the students’ cumulative GPA, FTF students reported a significantly higher level \[F(1,144) = 4.60, p < .05]. It should be noted that research has shown that for student survey respondents “self-reported” cumulative GPA is highly correlated with the “actual.” The specific sub-items which contributed to this difference are shown in Table 10.

### TABLE 10
**CURRENT CUMULATIVE GPA**

<table>
<thead>
<tr>
<th>Perception</th>
<th>FTF Mean</th>
<th>Online Mean</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current GPA</td>
<td>2.12</td>
<td>1.81</td>
<td>.01</td>
</tr>
</tbody>
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Item Scale: 1=3.6-4.0; 2=3.1-3.5; 3=2.6-3.0; 4=2.1-2.5; 5=2.0 below

11. Using a scale of “1=Very Dissatisfied to 4=Very Satisfied” significantly higher overall satisfaction with the course experience was reported by FTF students \[F(1,144) = 29.39, p < .01\] \[\bar{X}_{ftf} = 4.68; \bar{X}_{online} = 3.92\].
Differences in Learning Outcomes

12. FTF students expected a significantly higher course grade than online students using a scale where 1=C,C-, or lower; 2=B-,C+; 3=B; 4=A-,B+; 5=A [F(1,144) = 51.03, p < .01] [\bar{X}_{ftf} = 4.47; \bar{X}_{online} = 3.40].

13. Consistent with the expectation of a higher course grade, FTF students received a significantly higher grade than online students [F(1,371) = 3.82, p < .05]. For this ANOVA the letter grading scale of “F” through “A” was converted to a numerical scale with each half letter grade receiving an additional one point, so that an F = 1, D- = 2, etc. to a maximum of A = 12.

14. Students’ expected letter grade in the course was highly correlated with the actual letter grade received for both online and FTF students [r_{ftf} = .65, p < .01; r_{online} = .69, p < .01].

15. Significantly more FTF students received higher grades than online students [\chi(4) = 14.73, p < .01].

16. Online students were significantly older than FTF students [\chi(5) = 35.57, p < .01]. Consistently there were significantly more students enrolled with senior standing in the online course sections [\chi(4) = 14.59, p < .01].

17. Gender differences were not found for any of the variables in the study.

DISCUSSION

Hypothesized Differences – FTF vs Online

The differences between face-to-face and online course attitudinal, behavioral, and learning outcomes were measured using undergraduate students at a large public university located in the Midwest of the U.S. Support of study Hypothesis 1 was consistent with Bergstrand and Savage (2013) who stated that students in FTF courses tended to rate their instructor’s overall effectiveness higher than those in an equivalent online course. The current study findings suggest that students in the FTF course perceived their instructor as providing significantly more valuable instruction, valuable content, timely feedback, and availability than those in the online section.

The study findings which support Hypothesis 2 are consistent with both Driscoll, Jicha, Hunt, Tichavsky, and Thompson (2012) and Bergstrand and Savage (2013) in that students perceived their degree of learning to be significantly higher after completing a FTF course than an equivalent course offered online. The present study findings indicate that students who completed the FTF course reported significantly higher perceived skill development, understanding of the main course concepts, confidence in their knowledge of the course content, and a belief that the course material is more applicable to real world issues.

Hypothesis 3 predicted no significant differences between group academic performance means. The results of the present study did not support this hypothesis as the students in the FTF courses performed significantly better on the graded course components (i.e., ten quizzes, three examinations, and one case project) than the online students. This finding was similar to that reported by Wilkinson and Crews (2009) whereby FTF students yielded higher scores on examinations than online students. It was contrary, however, to the findings reported by Summers, Waigandt, and Whittaker (2005) in which no differences in academic performance was found due to delivery modality. Thus, this issue is far from resolved within the research literature.
Post Hoc Findings

The post hoc findings indicated that, with one exception, the FTF format yielded significantly higher student perceptions than the online format. FTF students rated the instructor behavior more favorably and perceived significantly greater gains from the course (e.g., understanding of the material, application of the information to concepts outside the class, etc.; see Tables 1 to 9). There would also seem to be a link between the positive view of the instructor and the course content and significantly higher academic performance in terms of graded quizzes, examinations, and projects (see Table 10). Online students, however, found the course to be of significantly greater value than FTF students.

IMPLICATIONS

The implications from this study are beneficial for universities who either currently have online courses available to students or are interested in offering online courses. Although offering online courses is a way to access students who are unable to attend in-class courses, there are critical factors that must be considered prior to implementation.

The present study found that students in the FTF course had different perceptions of the professor and their degree of learning compared to online students. This indicated that online courses should only be made available to instructors that have technical literacy in online course development, delivery, and communication. Interactions with online students should be constructed so as to increase perceptions of instructor availability and content relevance (see Fernandez, Carballo, and Gallan, 2010). Online course delivery must utilize effective presentation and learning strategies. Even though the online course delivery option has been available for many years, for older instructors in particular, it is important that the instructor use teaching methods and course designs conducive to online learning (Fernandez, et al, 2010; Richardson & Radloff, 2015). This may be of critical importance as students may see an online course as easier than FTF. For weaker students in particular, Fendler, Ruff, and Shrikande (2016) have documented the importance of online course design in shaping the academic performance for those students who “merely survive” the course (i.e., achieve academically within the bottom quarter of the grade distribution).

Perhaps of greatest importance may be the impact of a good relationship between the student and instructor on course perceptions and performance. Hernandez-Lopez, Garcia-Almeida, Ballesteros-Rodriguez, and Saa-Perez (2016) indicate that student-instructor relationships are related, albeit indirectly, to student knowledge acquisition and competency development. In the present study, it is possible that the student-instructor relationship may have been a significant moderator in that it controlled a broad range of student perceptions connected to the course delivery modality. The student-instructor relationship may serve as a halo effect in that it spills over to other, even non-related, student perceptions. A rich and positive student-instructor relationship may lead to more positive student perceptions of course content, structure, etc.

In a typical online course environment it is difficult to develop a positive student-instructor relationship primarily due to the constraints of available student-instructor communication methods (Jaggars, 2014). Indeed, Summers, et al. (2005) state “the online environment may lack the strong social dimension that is beneficial to face-to-face classroom experiences.” (p. 45). Limited to emails, discussion board postings, and other forms of electronic communication, development of a rich student-instructor relationship is definitely more difficult. Future research needs to identify the form, type, and nature of electronic communications between students and instructors within an online course which yield more positive perceptions of this important social relationship.
In order to avoid significantly different academic outcomes between equivalent courses using different delivery modalities, student readiness should be defined, measured, and used for entry into the course. Student readiness may include, but not necessarily limited to, completion of course prerequisites, proven literacy in online course technology, and an understanding of the personal responsibilities needed for successful online course completion.

In general, universities market online courses as a convenient alternative to FTF coursework. The present study indicates that online students place a high value on their online courses. Thus, as part of assuring student readiness, the marketing of online courses should include a “realistic job preview.” Potential online students need to be aware of the fast-paced delivery of content, unchangeable structure of the course schedule, assignments, etc., and the student’s required self-motivation to stay on task and work toward course completion. In other words, the students need to “teach themselves” (Jaggars, 2014). Many universities (e.g., University of the Potomac, 2016) use online marketing which stresses the need for students to be vigilant in completing weekly assignments, completing quizzes and examinations, and submitting assignments. Moreover, the student should be informed as to the role of the current instructor in the development and delivery of the course. All of these will assist in increasing student motivation towards course achievement and self-efficacy, factors which have been related to positive outcomes for online courses (Garcia-Almeda, Hernandez-Lopez, Ballesteros & De Saa-Perez, 2012).

REFERENCES


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