

PATRICIA DAVIS – CHANGING AN ACADEMIC CULTURE

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Patricia Davis, the newly hired dean of the Macklin School of Business at Kannapolis College, anxiously waits to hear if faculty will accept or reject her proposal. Davis aspires for the Macklin School to earn accreditation from the prestigious Association to Advance Collegiate Schools of Business (AACSB). Attainment of AACSB status will raise the profile of Macklin and make it more competitive in its bid to attract top students. The AACSB accreditation can only be reached, however, if the mission of Macklin is expanded to include an emphasis on faculty engagement in research activities.

This new emphasis would represent a marked change in the existing culture of the Macklin School. The School has always emphasized excellence in teaching, as evidenced by the faculty hiring process and tenure and promotion guidelines. Attainment of AACSB status would now require each faculty member to build a research portfolio, and some would have to start from scratch. While Davis had secured funding for research travel, she could not promise any pay increases for this increased faculty workload. Faculty are not always the most receptive when it comes to embracing change...how would the Macklin faculty react to Davis' proposal?

INTRODUCTION

As she looked out the window of her office, Patricia Davis knew it was time to share her plan with the faculty. Davis, the dean of the Macklin School of Business at Kannapolis College took a moment to remember all that had happened within the past few months. She had left her dean's position at a prestigious Northeastern university to take a similar position at this small, liberal arts college located just north of Charlotte, NC, a change that many friends and colleagues considered to be less than a horizontal move. Davis, however, saw potential in this small business school and, perhaps, a way to reach her ultimate career goal.

Davis had already suggested to the administration at Kannapolis that the business school might want to seek accreditation from the Association to Advance Collegiate Schools of Business (AACSB), and her next steps would be to reveal her plan for accreditation to the faculty. AACSB was a widely respected international accrediting body, and virtually all of the top business schools in the country could boast of AACSB accreditation. Davis had taught business strategy before becoming an administrator, and knew she would have to use all of her strategic skills to get the faculty to buy into her plan. One of the major challenges that would face the Macklin School in this accreditation effort was that the faculty would have to collectively demonstrate a commitment to scholarly research and other types of intellectual contributions. The emphasis at Kannapolis had always been on teaching; several faculty members would have to build their research portfolios from scratch. Davis would have to change the culture of the business school and encourage the faculty to accept this challenge without destroying the camaraderie and focus on teaching that they held dear. She would be revealing her plan at their upcoming meeting, and Davis' aspirations for the school, as well as her career, would hinge on how the faculty reacted over the ensuing months.

PATRICIA DAVIS

Patricia Davis spent her childhood in Missouri. Her favorite uncle was a professor at a prominent university in the area, and visits to his workplace allowed young Patricia to get a taste of the university atmosphere. She watched as her uncle interacted with students, researched and wrote academic papers, and most importantly, built a career that he loved. It was that relationship with her uncle and those experiences that pointed Patricia in the direction of her future career. Davis recalls that, "It may sound crazy, but when I was nine years old I knew that someday I wanted to be the president of a university."

Davis earned her undergraduate business degree at a large university in Florida, and worked as assistant manager of a tennis club for two years before returning to Missouri to work on her masters in business administration (MBA). After earning her doctorate from a prominent university in Tennessee, Davis returned to Florida, beginning her academic career at a university in central Florida. She started as a junior faculty member teaching courses in business management and strategy, but the dean realized her potential and put her on an administrative fast track. Davis brought leadership and energy to her administrative duties, and within a couple of years was named department head of the management program, and was later promoted to be the director of the school's executive MBA program.

She was quickly building an impressive resume, and began receiving overtures from other schools. One intriguing offer came from a university in Philadelphia; the institution, one of the top engineering schools in the nation, was looking for a dynamic leader to raise the profile of its business school. Davis accepted their offer and became their

dean; this put her in rather exclusive company, as she became one of only eleven women at the helm of an AACSB accredited business school. Davis was also married with two young children, and had the typical struggles balancing career and family. She enjoyed the fast pace of Philadelphia, and the business faculty grew to almost one hundred under her leadership, but she and her husband were not convinced that Philadelphia was the best place to raise their children.

KANNAPOLIS COLLEGE

Kannapolis College was founded in 1857 as a church-affiliated liberal arts college for women, and became fully coed in 1987. The undergraduate business major was started in 1948, an evening MBA program began in 1980, and an executive MBA program was added in 1990. The business school was named for Charlotte banker (and chairman of the college's Board of trustees) Samuel Macklin in March 1993, a result of a gift from one of Macklin's former business associates. The Macklin School had always emphasized excellence in teaching, as evidenced by the faculty hiring process. Many schools would ask faculty hopefuls to give a presentation on their latest research activities during their "on-campus" interviews, but applicants to the Macklin School were required to teach an actual class. The college's handbook suggested that tenure and promotion decisions were based on teaching excellence, intellectual contributions and service to the college, but it was widely known that those decisions were heavily weighted toward teaching ability.

The Macklin name brought some positive recognition to the business school, which was leveraged into additional resources and faculty. Samuel Macklin was one of the leaders of the Charlotte business community and had an extensive array of business contacts; a series of well-placed phone calls by Macklin brought in resources from the business community that were previously unattainable. By 2001, the internal view was that the Macklin School could develop into a premier regional business school, but needed to raise its profile. Queens and the Macklin School were highly regarded in the area, but that favorable reputation did not reach too far out of the Charlotte-Kannapolis region. It was felt that one way to bring excitement and recognition to the Macklin School would be to gain accreditation from the Association to Advance Collegiate Schools of Business (AACSB). The business programs were already accredited regionally by the Southern Association of Colleges and Schools (SACS) and nationally by the American Collegiate Business Schools and Programs (ACBSP). However, the Macklin School's primary regional competitors, Wake Forest and UNC-Charlotte, did have the more prestigious AACSB accreditation, and it was known anecdotally that at least one of these schools was using this in student recruiting, stating simply (and incorrectly) that the Macklin School "was not accredited." Macklin administrators began doing the groundwork in hopes of beginning AACSB candidacy, a five year process, in 2002. Arthur Sayers had been the Macklin dean since 1996, but announced his retirement following the 2000-01 academic year due to health reasons. Interim provost Katherine Wilcox would head the

dean search committee, and she knew that finding the right person would be critical. Wilcox and the search committee shared the opinion that the new dean would have to be a proven leader, familiar with AACSB, and willing to accept the challenge of changing the culture within the business school.

THE SEARCH

The search committee, which consisted primarily of faculty, trustees and college administrators, followed the standard procedure for a national search, placing ads in various academic publications. Katherine Wilcox also took the additional proactive step of asking search committee members to solicit recommendations from colleagues, friends or other outside connections. The goal was to identify the best person for the job, and Wilcox was determined to use all means possible to find that individual. It was on this list that the name of Patricia Davis first appeared, recommended by the friend of a college trustee. The committee quickly determined that Davis possessed the skill set they were seeking; Wilcox said, "I knew she (Davis) was the person we were looking for, the question was whether we could even get her to visit our campus."

Over the next few weeks, Wilcox and other committee members had a number of conversations with Patricia Davis, who was initially cool to their overtures. Still, Davis and her husband had passed through the Charlotte area on a couple of occasions and were struck by the beauty of the region, even thinking that the area would be a nice place to live. Davis had also researched the career of the school's namesake, banker Samuel Macklin, and had great admiration for the man's life and accomplishments. Davis was also on the receiving end of some healthy doses of Southern charm, recalling that, "everyone was just so nice...I decided that I at least owed them the courtesy of a visit." By all accounts, Davis' visit to Kannapolis College went quite well. Macklin faculty and staff had opportunities to spend time with Davis, either individually or in groups. Management professor Bill Haynes recalls that, "Davis was very impressive...personable, intelligent and she really seemed to listen to my thoughts about the school." The search committee was even more convinced that Davis was the right candidate; Wilcox remembers that, "we never really considered anyone else for the job. We literally had no backup plan if she (Davis) turned down our offer." Davis came away impressed with the relationships among the business faculty and staff, thinking that, "these people really got along with one another, and felt they were moving towards a common goal." Despite enjoying her time on the Kannapolis campus, Davis returned to Philadelphia without any serious thoughts of a job change.

There was, however, one key player at Kannapolis that Davis did not meet. Two days later, Davis received a call from Samuel Macklin, who explained that he was unable to meet with her during her visit to Kannapolis due to a business trip that could not be rescheduled. Macklin, in his role as chairman of the college's board of trustees, would be part of the interview process if deans of other high-profile administrative positions

were being hired. He asked her if, before deciding on the school's job offer, she could return to Charlotte to meet with him (even offering to send his private jet). Davis was intrigued by Macklin's invitation and noted, with a chuckle, that, "he is not a person who takes 'no' easily." Patricia Davis was on her way back to Charlotte.

Macklin has requested that Katherine Wilcox transport Davis to and from the airport and his office. A planned thirty-minute meeting ended up lasting two hours. Macklin and Davis spent those hours standing at the floor-to-ceiling windows in Macklin's penthouse office, which overlooked the growing downtown Charlotte area. Macklin shared with Davis his dreams and aspirations for both the city and for the Macklin School. He mentioned that his original involvement with the college was as a favor to a friend, but over the years he had developed a great sense of pride and admiration for the college and its mission. He expressed his respect for the Macklin faculty, a sentiment that was heartily returned by the faculty, as Davis had learned during her interviews. And though she'd not anticipated such a response, she found herself becoming caught up in his vision and felt that perhaps she was meant to be a part of that vision. Macklin ended their visit by saying, "If you'll take this position, Patricia, you and I are going to build an outstanding business school together."

On their way back to the airport, Wilcox mentioned that Edward Benning, the college's current president, would likely be retiring in a few years. Wilcox further explained that if Davis were to accept the job and succeed as the Macklin School dean, she would be in a good position to become his successor when that time arrived. Davis started considering the possibilities at Kannapolis; if she were to successfully lead two business schools of vastly different sizes and scopes, she should be a good candidate to lead a college, either Kannapolis or somewhere else. Davis accepted the college's offer, and became dean of the Macklin School, effective June 2002.

THE PLAN

In the ensuing months, Davis crafted a vision for the Macklin School. Prior to this vision, the goal was to be "a good business school," but specifics to attain the goal were never developed. Davis wanted the school to become a premier regional business school, and develop a niche area of expertise in leadership. Davis felt that Samuel Macklin and other "movers and shakers" in the Charlotte area stood out because of their leadership and commitment to the community. Davis wanted to capitalize on this sense of civic pride and develop a legacy of quality and leadership in order to make the Macklin School "a resource to the community." She worked with the faculty and administration to develop the school's new mission, to produce graduates versed in the "Three C's: Competence, Character, and Commitment to Community.

The "Three C's" helped define the school's mission, but Davis felt that the Macklin School

would never reach its potential without AACSB accreditation. In order to be accredited by the AACSB, business schools needed to meet twenty-one standards and demonstrate plans for continuous improvement. As an example, the new mission and vision statement built around the “Three C’s” would likely satisfy the first standard. After a review by a committee of faculty and staff, it was determined that many of the necessary features, such as adequate financial resources and workable assurance of learning programs, were already in place and needed only minor upgrades or improvements. However, several of the standards dealt with faculty research, and those standards would be troublesome. Even though the AACSB had recently adjusted its specifications to include business schools with a “mission focus” (which fit the Macklin School’s teaching priorities), their focus was still on larger, research-oriented universities. And most of the Macklin School professors were not actively engaged in research activities.

Davis knew that she had to get the faculty to embrace this critical aspect of her vision and to move together in the same direction. She needed to convince a group of people who hadn’t had research requirements for years that adding a research component to their workload could be beneficial to them as individuals and as a team. She could simply inform the faculty that this was the direction that the school was heading, but such a strong stance could crush morale. Davis knew of other schools that had tried to implement a similar change, but failed when faculty flatly refused to embrace the move. Another option was to ask for an immediate faculty vote, but there were no other options if faculty voted for the status quo. Davis knew that there were risks, as “the faculty really bonded over their love of teaching, and that’s what made the Macklin School special. If it (the research initiative) was going to tear apart that culture, I would have to pull the plug on it.”

Davis developed a plan designed to simplify the transition back into research for faculty members, and to convince them (in advance) that they could do research that could complement, rather than take time away from their focus on teaching excellence. Davis was aware that in order to achieve a major cultural change, the individuals involved needed to not only have the desire to change, but also feel that they had a reasonable chance to succeed. She realized that several faculty members had not participated in research since being in graduate school, and thought of “research” as the high-level, hypothesis-testing papers authored by the faculty at those larger, research-oriented institutions. The Macklin faculty had to be made aware that there were other, more practical types of research also available. Davis decided that business case writing would be an optimal way for the professors to mix their love of teaching with research, as case methodology was already used extensively in the classroom.

As the first step in her plan, Davis brought in an expert on case writing from a local university to conduct a seminar with faculty. Together, they explained that case writing would allow the faculty to investigate areas of business that were interesting to them and

would also prove useful in the classroom as teaching tools. It could also provide them with the opportunity to work together, and Davis encouraged that type of collaboration. Finance professor Ron Edmunds left the workshop thinking that, “this (case writing) seemed like something I could do in the form of research, but could also bring it into the classroom.”

The remainder of Davis’ plan was revealed at the next faculty meeting. She explained the value of AACSB accreditation, and how it would level the playing field in recruiting top students. She then talked about research, stressing that even though faculty research was a necessary component for AACSB accreditation, the Macklin School would never become a “publish or perish” type of institution. Davis knew that financial resources would be necessary in order for the professors to have the means to research and attend/present at conferences, so she secured a substantial donation that would cover faculty development and travel for at least ten years. Having the funding in hand allowed her to implement the next aspect of her plan, inviting faculty members to attend a conference strictly as a spectator, to observe the type of research being presented. Davis felt that, “the faculty was certainly smart and creative enough to do research; they needed to realize that for themselves.” Most schools establish annual travel budgets for their faculty, and only allocate funds when presentations are made. After laying out her plan, Davis opened the floor to questions; not surprisingly, there were several concerns. The biggest issue was increasing the faculty workload without compensation. Davis admitted that there would be no research-driven salary increases while the school was in AACSB candidacy; a compelling case could be made to the administration for salary adjustments if AACSB accreditation was gained, but that would be several years in the making. Davis assured the faculty that research was strictly voluntary, and that no one’s job would be at stake as long as they continued to perform well in the classroom.

Quality of life issues also arose; marketing professor Chris Wilson recalled that, “I came to Kannapolis because I loved teaching, and didn’t really care to do research. When she (Davis) started talking about research, my first thought was that maybe I needed to move on.” Fear of failure was also an issue; Ron Edmunds was a tenured finance professor, and he felt that, “I knew Davis was brought in to improve the Macklin School, so I was willing to listen and keep an open mind. The problem was I hadn’t done any research in ten years, hadn’t kept up with research in my field, and wasn’t sure I had much to contribute.”

Davis answered all questions and concerns posed by the faculty, and encouraged them to stop by her office to voice additional concerns, but left the meeting without any real sense of whether the faculty would accept or reject her plan.

BUSINESS PROGRAM STUDY ABROAD INCIDENTS: LESSONS LEARNED THE HARD WAY

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A study abroad site director and an instructor, both experienced in international travel and residing in foreign countries, organize and carry out a four-week business school program, following nearly a year of detailed planning. Nevertheless, a series of actual events and subsequent unanticipated consequences provide a number of valuable lessons that illustrate the inherent gaps in any such planning. The case is appropriate in undergraduate or graduate introductory educational administration/leadership courses and/or training seminars to provide the student a glimpse into the “real world” of teaching overseas at the university level.

INTRODUCTION

Professor of Management Evan Addison looked forward to yet another stint as Site Director and instructor in his business school’s annual month-long study-abroad program in Europe. As the “old man” in the well-established summer event at the same location in Germany, he could visualize what should transpire later in that very day. To be accompanied once more by his younger colleague in Marketing, bilingual (in German, no less) Robert (Bob) Belafonte, Evan’s mind dwelled on the positive aspects of the adventure: Everyone would congregate at the airport this afternoon at 2:00 p.m., enjoy a leisurely overnight flight to Frankfurt, and take a mere one-hour train ride to the friendly German university which housed and fed them. As another courtesy, their luggage would be transported for them to their living quarters by way of a university truck after they were met and formally welcomed at the local train station by a senior administrator. This well-respected university of applied sciences provided state-of-the-art classroom facilities and proactively supported them in every aspect. Evan and Bob had developed some lasting friendships with the host university’s International Office leadership and staff. Three all-day industrial field trips had been carefully arranged to the smallest detail, including transportation, meals, and guides as necessary; each plant tour had been done once or twice in the past so no surprises were expected. An optional five day excursion to Paris had been offered to the participants; the hostel where they always stayed was booked and paid for in advance.

Things got off to a good start as smiling students and many parents were already wait-

ing when Evan and Bob arrived with the airline tickets, Eurail passes and pre-printed luggage tags packaged individually in special envelopes. Cell phones seemed to be in use by nearly everyone, including the parents while the attendance was being checked. Of the group of 15, only one student was running a little late but she had called and soon appeared just as it was time to check the heavy luggage. Bob led the group to the Lufthansa counter. "Get a move on, you guys!" he called cheerfully, "You are about to have the adventure of your lives!" Though still optimistic, Evan couldn't help but wonder what surprises were in store for everyone as he lifted his suitcase onto the check-in scales, which suddenly seemed heavier than it had been that morning. "Could that new traveler's compact scale he just bought be inaccurate?" he thought. "No, I shouldn't start this trip by worrying about anything."

INCIDENT 1: LATE ARRIVAL AT THE FRANKFURT AIRPORT

Drs. Evan Addison and Bob Belafonte had spent time many months ago selecting an optimum departure time from the Frankfurt airport by train. They had allowed for a possible delay in the arriving flight time and considered that some students might want to buy one-way train tickets rather than using up a valuable Eurail pass day. There was also the need to allow time for the authorities to activate the passes, which would take a few minutes for each person after standing in line and presenting passports for identification. Evan began his typical "what if" thinking ritual as he sipped a second cup of coffee aboard the plane. Bob dozed nearby and several students were chatting away while flight attendants methodically cleared away the remains of a surprisingly civilized meal. He heard one student warn his seatmate to go easy on the free wine. Evan then recalled the series of email exchanges with Dr. Schwarz, Director of the International Office and their program host in Germany. Dr. Schwarz had voiced mild astonishment that Evan and Bob had allowed four hours or more after the plane was to arrive before the group would leave the airport by train. He had encouraged an earlier train departure time and noted that this decision would impact his own arrangements for the luggage pickup at the local train station. The suggestion had also been given that train seat reservations should be made because that time of day was a busy one for rail travel. Evan had taken the initiative to purchase those reservations in advance over the internet. He had receipts for the group to use in conjunction with their Eurail passes or tickets after boarding the train. Mulling over the scenario for a while, he suddenly frowned.

"Uh oh," Evan exclaimed aloud, waking up Bob. "What's the matter, Evan?" Bob asked, rubbing his eyes. "Well, I just remembered that I never got around to firming up that train schedule with Dr. Schwartz. I told him that I would let him know if you and I decided to depart earlier from Frankfurt as he recommended!" "You worry too much, Evan. Relax," Bob retorted. "Dr. Schwartz is a clever man and he'll be waiting at the train station with that truck and crew just like last year."

As it turned out, the plane was more than two hours late and by the time the group cleared customs there was not enough time remaining to get lunch or make cost-benefit analyses about using Eurail passes versus buying rather expensive one-way tickets. Evan instructed everyone to line up immediately and get their Eurail passes activated whether or not they wished to buy one way tickets. Time was of the essence. The line was long and slow-moving. Officials were polite, methodical, but in no particular hurry. Both leaders sensed a general feeling of frustration if not panic as the clock ticked down toward their scheduled train departure time. Tension mounted as the last two students struggled to find and retrieve their Eurail passes from their luggage. Evan asked Bob to lead those who had finished the process quickly toward the train while he remained to bring the stragglers.

Elevators or escalators were needed to reach the departure site. No thought of locating the specific rail car with their prepaid seat reservations crossed anyone's mind during the footrace. Evan and the last group of students literally ran, dragging their luggage to the platform which of course was packed with travelers just as Dr. Schwartz had predicted. But to surpass that scene, he saw that the high speed train had two connected engines facing each other, located right in the center of a very long configuration of rail cars. Independently, Evan and Bob reached the same immediate conclusion: Both leaders were certain that the train would surely be split apart later in the trip toward different destinations. Needless to say, there was no internal interconnectivity for passengers in route between the two trains, "Did anyone see Dr. Addison's group get on the train?" Bob called to some students. No one had, and it was assumed that the stragglers either missed the train altogether or they would likely be heading in a diverse direction before long.

Meanwhile, as the train doors slammed shut behind him and he found a seat, Evan momentarily regained enough composure to retrieve and switch on his European cell phone to call Dr. Schwartz and reconfirm the arrival time. The final straw came when Dr. Schwartz told him that since he never heard back from Evan a few weeks ago, he had not made any arrangements to have the heavy luggage transported to their quarters! They would have to use public transportation.

INCIDENT 2: WHAT WE GOT HERE IS FAILURE TO COMMUNICATE

Both Evan and Bob were feeling confident that all their planning over the previous 12 months had prepared them for almost anything. Over breakfast on the first day in Germany the two of them were comparing notes on the week's activities when Patrick, one of their students, walked up to their table in the cafeteria with a problem. "I need someplace to keep my medicine!" stated Patrick. "What medicine, Patrick?" enquired Evan. "Can't you just keep it in your room?" added Bob. Patrick replied, "Oh, no. This is my insulin that I have been taking since I was a kid and it MUST be refrigerated!"

Both Evan and Bob looked at each other in surprise as they had not known that Patrick, or any of their study abroad students, had any special medical requirements. During the previous months of planning for the trip the two instructors had experienced various challenges in obtaining information from program administrators back at their university in the States. Information that should have been shared with them as instructors on the trip just was not forthcoming. Senior officials, often legitimately concerned with privacy issues under the law, tended to provide such information on a “need to know” basis.

“Well, don’t worry, Patrick. I’ll ask the manager of the hostel here and I am sure it will not be a problem for them to place it in the kitchen’s refrigerator for you,” said Bob. Bob and Patrick then took the insulin to the front desk and spoke with Rolf, the hostel manager and Dieter, his young, part-time assistant who was always eager to help and practice his English. Rolf, a man of few words, assured Bob and Patrick that the medicine could be kept in the kitchen “cooler” and then instructed Dieter to take care of it. Dieter took the medicine and walked briskly off to the kitchen, very happy that he could be of such assistance to his new American friends.

At breakfast the next morning, Evan and Bob barely got one sip of hot coffee before their daily meeting was interrupted by Patrick bursting into the cafeteria screaming, “My medicine!! My medicine!! It’s all ruined!!! Over \$4,500 worth of medicine that I need for the whole month is frozen!!!” After checking with the kitchen staff, Evan and Bob determined that Patrick’s insulin had indeed been frozen. In his enthusiasm to help the previous morning, it seems that Dieter had placed the insulin in the freezer instead of the refrigerator. Patrick’s much needed insulin was unavailable and panic was starting to overcome him. “I am gonna sue!! I’m gonna sue!” Patrick claimed as he marched off to call his parents back in the States. Evan and Bob just looked at each other and wondered what could be done now.

INCIDENT 3: IMPROMPTU TRAIN TRIP

Despite the somewhat shaky Monday start, the study-abroad participants had handled the tumultuous arrival in Germany and jet lag maturely and by Tuesday were already busily fine-tuning their plans for various weekend sightseeing excursions. Bob and Evan, however, were faced with another dilemma. Just a week ago before the trip began, Evan had received an unsolicited email message from a hostel in Berlin asking for a sizable amount of money as the “now due balance” on reservations made nearly a year ago on the group’s behalf by the German host institution. “What trip to Berlin?” Evan had retorted before learning the stunning truth: During a visit by dignitaries (including the dean of his college) shortly after the previous year’s successful program, a well-meaning staff person in the German host institution had asked whether or not the next year’s group would like him to plan an excursion to Berlin. Everyone agreed that this would be a nice opportunity, not realizing that this verbal acceptance was much more than a

general support of an idea. The actual reservation was made for twenty people and the host institution paid the deposit on behalf of the American program. Since the German institution's International Office had numerous consortiums underway year round, often arranged these sorts of trips, and the deposit had been made, they made no more mention of it and left the responsibility of follow up to their guests from the U.S.A. Rather than causing embarrassment to anyone, the home institution's College of Business decided to accept the responsibility but assigned Evan with the task of convincing as many students as possible to take the trip in order to recoup at least some of the monetary loss.

Evan and Bob managed to convince half a dozen students to take the spontaneous trip, leaving bright and early on a high speed train which made daily stops in their host city. The leaders purchased seat reservations and briefed the small group on the essentials. "You will be amazed at how efficient the rail systems are in Europe," Bob told the students. "There will be charts or electronic signs with diagrams and once you know your rail car number you can see exactly where to stand on the platform. When the train stops, you will see your car practically in front of you so you just hop on and locate your reserved seat. "It'll be especially easy this time," added Evan since we are all on the same car. Be sure to bring your Eurail pass and your passport."

Everyone gathered as planned at the noisy platform. The public address system blared out a succinct message in German. Bob thought he heard what seemed to be an announcement about the train to Berlin and saw some passengers looking nervously around as the train rapidly approached, then stopped. Doors opened and the crowd surged forward. Evan was busy taking a video of the arrival. "Hey, guys!" one of the students yelled, "I don't see any rail cars with numbers even close to the one we're looking for! Something's wrong!" Bob spoke with a rail official in German who explained that the regularly scheduled train had some mechanical problems so another train had been assigned. He was told to board any car, but to hurry because the train would depart in exactly three minutes. Bob waved the group to follow him and everyone rushed to find a car entrance that wasn't already packed with would-be boarders and suitcases. A kind woman saw the bewilderment in Evan's face. She suggested that the group run further down the track and board one of the rail cars designated as being first class, i.e., displaying a large numeral 1. Evan, Bob and the students followed her, climbed aboard and were relieved to find empty seats for the long trip ahead. "But I thought that since first class tickets cost a lot more than the second class ones we have, they wouldn't allow us here," Evan said, nearly out of breath. Smiling broadly, the "good Samaritan" woman said that this was the only positive thing about a last minute change of trains. "No one has any reservations now, so it's first come, first served!" She added that the group should not be intimidated if passengers insisted on having their reserved seats. "Now there's a tip worth sharing," Evan thought to himself. At other stops on the trip, additional first class passengers boarded and tried to eject the apparent "squatters" to no avail. He was pleased to see one instance where a student did relinquish his seat for a senior citizen.

The remainder of the quick weekend adventure was enjoyed by all, the only regret being the original international communication breakdown which had lost money for the program and prevented more student participation. That would never happen again, he vowed.

INCIDENT 4: LA VIE Á PARIS!

Having just arrived into Paris' Gare d'Est station on the high-speed train and being excited to be in the famed "City of Light," the students eagerly received their youth hostel room assignments and half-heartedly listened to Evan's and Bob's instructions and warnings about traveling about Paris. Practically before Evan and Bob could say "Bienvenue á Paris!" the students had deposited their luggage and scattered to the winds of Paris. "Well," Evan said looking at Bob, "this has the makings of a very interesting visit for all of us!"

One student, Clarise, had been looking forward to visiting Paris the whole month. Unfortunately, Clarise's boyfriend had broken up with her the very day before she departed the U.S.A. for her summer experience. Having read so much about Paris and having heard that it was a city of fashion and romance, Clarise thought that shopping and Parisian boys would be the perfect antidote for a broken heart. After having stored her already bulging "one piece of luggage" in the hostel's luggage closet, Clarise headed off with the other students to explore what Paris had to offer.

Over the next couple of days Evan and Bob noticed that a new young man had been joining their students for dinner in the hostel's dining room, always sitting next to Clarise. That evening Bob decided to join the students for dinner and noticed that the fellow had purchased a few bottles of good wine for everyone to share. Bob, having decided to introduce himself to the generous youngster, walked up to him, offered his hand and said, "My name is Dr. Bob Belafonte, but my students call me 'Dr. B'. Thank you for sharing your wine with us. That was very nice of you!" Clarise then chimed, "Dr. B, this is Hassan, my friend that I met at a bar on our first night in Paris. He is from Algeria and is studying architecture here in Paris." Hassan shook Bob's hand and said with a broad smile, "It is a pleasure to meet you, Dr. B. The scholarship I have from my government provides me with more than enough money each month for food and I have not been spending it all. Sharing a few bottles of wine is the least I can do for people who have been so friendly to me. I am glad you enjoyed it."

The group saw more and more of Hassan during the remaining days they spent in Paris. Clarise continued to go on shopping forays, not only to the department stores, but also to some more exclusive shops. Each time, Hassan was close in tow, often purchasing things for Clarise. She even had to buy another large suitcase to fit everything she had acquired in Paris (and Germany!). On the day before the departure from Paris, Hassan had bought Clarise a very expensive-looking ring with a blue sapphire in the middle. On the day of departure, students were responsible for getting their luggage onto Paris'

Metro, the subway system that would take them to Gare de l'Est for the train back to Frankfurt. Like Clarise, a few other girls had not heeded the warnings of Evan and Bob regarding luggage in Paris and had purchased suitcases to carry their new possessions. As some of the Metro stations have winding tunnels and numerous levels of stairs, most of them had a great deal of trouble negotiating the stations with their added luggage. The boys of the group helped out as much as possible, but had their own luggage to carry. Lucky for Clarise, Hassan was seeing her to the station to say their good-byes and could help her with her luggage.

At Gare de l'Est, the group had over an hour to wait. Most spent the time purchasing food and drink for the 2 ½ hour ride to Frankfurt. Evan and Bob tried to keep the group together in the busy station as much as possible. They were challenged by the French train system's policy of not announcing the departure track until right before the train's departure, giving passengers precious few minutes to find the train and their assigned car on the train while dragging their luggage. Clarise, with reddened, tear-filled eyes slowly boarded the train as Hassan watched from the platform. Their eyes did not release each other's gaze until the train slowly pulled out of the station on its journey to Frankfurt. Concerned with Clarise's disposition, Bob sat next to her and asked Clarise if she was alright. "Oh, I'm fine," Clarise responded with tears in her eyes. "He is going to come visit me in the States and we are going to stay in touch via Skype." After waiting a few minutes to allow Clarise time to compose herself, Bob gently explained to her, "Clarise, I do not want to sound insensitive, but it is my responsibility as one of the leaders of this group to ask whether Hassan has given you anything to take back to the States besides the clothing and ring he bought for you?" To which Clarise quickly responded in an incredulous voice, "What on earth are you talking about, Dr. B?"

INCIDENT 5: A LEADERSHIP LESSON ON EFFECTIVE FOLLOWERSHIP

Dr. Evan Addison always felt more confident in leading groups of study-abroad students on field trips when he had prepared detailed Instruction Sheets for each participant, which he commonly referred to as "poop sheets" to the bemusement and amusement of the young people (Exhibit 1). "Where are we supposed to meet?" or "How long is this bus ride?" would be handled by his reply of, "Check your poop sheet. You did bring it, didn't you?" If trips were repeated in subsequent years, Evan would use an updated version, adding to what had worked in the past. He realized of course that students rarely felt the need for these information sheets unless they found themselves separated from the leader or the group. He often asked them to keep their eyes open for directional signs or landmarks as they made their way to special destinations.

What might purport to the model of a perfunctory short trip is the fast train ride from Frankfurt Main to the Frankfurt airport. On the very last day of the program, the group headed through the train station for this simple connection, made foolproof in Evan's mind since he had reprinted and distributed last year's instruction sheet. At the bottom

of the escalator when they were approaching the platform Evan was looking to no avail for Train number S8 as cited on the “infallible” poop sheet when a student cried out, “Say this poop sheet thing is wrong! We need Train number S9, not S8! Number S8 goes in a different direction, Dr. Addison!” “That’s impossible,” Evan replied deliberately displaying great calmness, “Trust your poop sheet!” The student’s persistence soon paid off for everyone when Bob had a flashback to the previous year and agreed with him. “I remember now! I was at the head of the stampede and instead of checking the sheet I got directions from a rail official who just happened to be standing there. The poop sheet had an error last year and we never realized it!” They would have lost a great deal of time and missed their planned rendezvous with the host university’s luggage truck if they had taken Train S8. Evan’s feeling of chagrin quickly turned to a “Eureka moment” when he realized the valuable management lesson learned here: Effective team members should not lean solely on the formal or informal leader for direction. By doing so they are shunning responsibility, not developing themselves, and opening up opportunities for group mistakes or failures. Evan wondered if he could pass this inadvertent real-life lesson on to the students before they dispersed, perhaps never to meet again as a group. He knew full well that it was far too late in this trip to expect students to pay serious attention to much of anything beyond being back at home tonight.

EPILOGUE

Drs. Addison and Belafonte didn’t cross paths again until the fall term began. Most of the students returned to the campus and eventually it was learned through the grapevine that (1) Clarise and Hassan had broken up, (2) Patrick’s family was independently wealthy so he was having no difficulty receiving a steady supply of insulin; in fact, he had been known to be very careless in handling his medicine so there was not even a hint of a pending law suit, and (3) that an idiosyncrasy of their own university’s computer network firewall had been blocking email messages from certain individuals on the overseas host university’s International Office staff, which partially explained the nearly aborted excursion to Berlin. “It looks as if we still have plenty to learn,” Evan remarked as they sat down for some coffee. “No doubt about it,” Bob retorted. “Are you ready to do it again next year?” “Let’s go for it!” Evan said without hesitation and with a big smile.

EXHIBIT 1

Sample Student Instruction Sheet

Field Trip No. 2: AUDA AG, Neckarsulm, Wednesday, July 21

1. Assemble at **7:30 a.m.** at the Hostel and depart immediately on foot to “Europaplatz.” (If you miss breakfast you can get something at the Hauptbahnhof (Hbf) to take on the train.)
2. Take **Tram #2** in the direction of **Tivoli** or **Tram #4** from **Europaplatz to the Hauptbahnhof (Hbf)**. We already have group tickets that will be used all day.
3. In **FRONT** of the Hbf, we take **regional train/tram ES4** (WITH NO TOILET!), arriving then departing *quickly* at **8:25 a.m.**, arriving in Heilbronn (Bahnhofsvorplatz) at **9:48 a.m.** **We change trains there** and board **Train number RE 4834, Platform 3** (any second-class wagen; no reserved seats; we already have another set of group tickets just for this short ride) to arrive only *four minutes later* in Neckarsulm at **10:10 a.m.** **Be on your toes!**
4. The plant is a very short walk from the train station. **Our Greeting Session (10:20-10:35 a.m.)** will be held on the Foyer, 2nd floor. If for some reason you become lost, call Ms. Angela _____, Dr. Addison or Dr. Belafonte.* *Audi will provide refreshments during the greeting session.*
5. **The Audi Forum** (giant showroom on two levels) **Tour** is from **10:35 until 11:10 a.m.**, (Photography allowed) followed by **Lunch** at the Audi staff restaurant from **11:10 until 12:30 p.m.** (shuttle arranged by tour guide). There are lockers for any belongings you wish to secure (1 Euro which will be returned).
6. **Production tour of the R8, A6 and A4 models** starting at the Audi staff restaurant, **12:30-14:00** (NO PHOTOGRAPHY ALLOWED IN THE PRODUCTION AREAS).
7. Depart at 14:00 by factory transportation (shuttle bus) for Wartberg (guided tour with explanations in English) and a **wine tasting and buffet later in the afternoon**. Our host will be vineyard owner Mr. Andreas _____.
8. Afterwards, the Audi shuttle bus will take us to the Heilbronn Hofbahnhof, where we depart for Karlsruhe on **Tram ES4** at either 6:07 or 8:07p.m. and arrive in Karlsruhe (Europaplatz) at either 7:33 or 8:33 p.m. NOTE THAT THIS RETURN TRAIN ALSO HAS NO TOILET FACILITIES!

***AUDI CONTACT PERSON:** Ms. Angela _____ 0151-5434 _____

Dr. Addison: 0157 03480177

Dr. Belafonte: 0157 834800

EXHIBIT 2

Cast of Characters

Dr. Evan Addison	Professor of Management, Site Director/Instructor
Dr. Bob Belafonte*	Associate Professor of Marketing, Instructor
Dr. Schwartz	International Office Director, host University
Patrick	An American study abroad student
Rolf	Manager of the student hostel in Germany
Dieter	An employee of the student hostel in Germany
Clarise	An American study abroad student
Hassan	An Algerian student studying in Paris

*aka "Dr. B"

Additional Readings

- Lussier, R.N. and Achua, C.F. (2010). *Leadership: Theory, Application, & Skill Development*. (Fourth edition). Mason, OH: South-Western Centage Learning.
- Nelson, T. and Ornstein, S. (2002). Preparing for the Unexpected: Managing Low Probability, Disruptive Events in Student International Travel Courses. *Journal of Management Education*. 6(3). 259-72
- Ware, Fred A., Jr., (2004) A Study Abroad Director Tells All. *Southeast Case Research Journal*. 1(1). 71-77
- Young, J.R. (2002). When Trips Abroad Go Bad. *Chronicle of Higher Education* 49(6). p A49, 2p, 1c, 10/4.