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Mission Statement

The mission of the *Journal of Multidisciplinary Research* is to promote excellence in leadership practice by providing a venue for academics, students, and practitioners to publish current and significant empirical and conceptual research in the arts, humanities, social sciences, and other areas that tests, extends, or builds leadership theory.

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Editorial

A warm welcome to the spring edition of the *Journal of Multidisciplinary Research.*

I am pleased to announce that we started 2012 with several new agreements and journal improvements. This ensures our commitment to academic and professional excellence. We just signed a new licensing agreement with Gale/Cengage, a world leader in e-research and educational publishing, and MediaFinder, a leader in news services. Also, we are now listed in the *Directory of Open Access Journals.*

In this issue, we are introducing several changes to improve the journal experience for academics and practitioners alike. Questions for classroom discussion were introduced at the end of each article to encourage and engage researchers and students. We also added a new feature called "To Cite this Article" to make it easier to cite articles published in our journal.

In our continuous effort to deliver interesting research from around the world, our current edition features thought provoking articles from the Copenhagen Business School and Zefat Law School in Israel as well as universities closer to home such as Florida State University, Nova Southeastern University, and Indiana University. This issue of the *Journal of Multidisciplinary Research* (Volume 4, Number 1) also contains three book reviews and a "Life Forward" section featuring an interesting interview with the founder and Chief Marketing Officer of SafetyPay.

Gandhi said, "Be the change you wish to see in the world." By bringing you a truly multidisciplinary global journal, we provide a venue for the researcher and the reader to "be the change."

All the best,

Hagai Gringarten
Editor-in-Chief

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Using a Forensic Research Method for Establishing an Alternative Method for Audience Measurement in Print Advertising

Marcus Schmidt, Niels Krause, and Hans S. Solgaard[1]

Abstract

Advantages and disadvantages of the survey approach are discussed. It is hypothesized that observational methods sometimes constitute reasonable and powerful substitutes to traditional survey methods. Under certain circumstances, unobtrusive methods may even outperform traditional techniques. Non-reactive approaches seem especially appealing in situations where instrumental effects threaten to bias findings. The present paper investigates whether it is possible to estimate the readership of sales flyers by uncovering fingerprints (FPs) on the pages. First, two earlier approaches are discussed. Next, an empirical analysis of several thousand flyer pages across more than 100 issues is presented. The sample of issues was collected at a recycling center and subsequently analyzed by a forensic expert. While the FP-approach to audience measurement seems not to be working properly for flyers with a limited amount of pages, the method appears applicable for flyers with multiple pages (magazines, catalogues, etc).

Keywords

advertising, audience measurement, fingerprints, forensic research method, print advertising, readership, sales flyers

Introduction

The Rise of Unobtrusive Methods for Measuring Exposure to Electronic Media

Since the invention of the people-meter system (introduced in the United States in 1987 by A. C. Nielsen), great progress has been made concerning the validity of television audience

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measurement. Although people-meter analysts have been struggling with measurement problems, such as fluctuations in ratings caused by artificial phenomena (Milavsky, 1992), the method is assumed to outperform competing approaches, such as diaries, based on self-reports (Baron, 1995). According to many researchers, the methodological virtues of observational techniques like passive-people-meters, scanning-based store audits, and comparable electronic measurement devices are caused by their high degree of "unobtrusiveness."

While consumers, whose purchases are registered by a scanner system, do not know their behavior is being measured, members of a TV-people-meter panel are well aware of it. However, research indicates the embedded measurement error is rather modest (Danaher & Beed, 1993; Danaher, 1995). The method seems to be almost free from several sources of error typically attributed to data based on self-reports, like over- or under-reporting, backwards or forwards telescoping, low involvement, ambiguity, non-response, etc. Thus, it may be little surprise that research on exposure to electronic media has shifted from reactive methods, such as self-reported surveys, to less-intrusive, observational methods. Interestingly, research on exposure to print media is still primarily based on self-reports.

Regarding paid-for-print media, such as newspapers and magazines, net circulation can be estimated fairly precisely, and in most developed countries is estimated, or at least controlled, by an independent audit bureau of circulation. Measurement of readership, in contrast, is much more inaccurate and is the yardstick by which an advertiser measures the value of print media. Generally, measurements are based on the survey approach, where samples of potential readers are asked to recall having read, looked into, or flicked through a particular newspaper or magazine issue. Depending on the degrees of telescoping, probably more for weeklies than dailies, and more for monthlies than weeklies, the demands on respondents' memory are heavy, and the possibility for error is considerable.

For free print media, such as sales or advertising flyers, sales catalogues, and free daily newspapers, measurement of readership is even more inaccurate. Readership measurement is based generally on the survey method, as is the case for paid-for print media and is, therefore, subject to the same inaccuracies. In addition, flyers, catalogues, and free newspapers are typically distributed (as described below) to household mailboxes as unsolicited printed matter; many recipients will not be interested in the material, while others will be only marginally interested, finding it difficult to distinguish between various flyers and difficult to remember having noticed or read a particular flyer during a specific week.

Are Approaches Based on Self-Reports a Necessary and Sufficient Condition for Measuring Exposure to Print Media?

Historically, the survey approach has been the prevailing technique for gathering marketing research information, while observational methods have been applied less frequently. Due to several reasons, both the academic community and the commercial sector apparently prefer the questionnaire to observational investigation. Why is this so? First, when using a survey, the researcher has full control of the experimental design. Second, the questionnaire can be structured properly. Third, the method is well established. Fourth, responses are easy to analyze and, thus, results are soon at hand. Fifth, a wide array of powerful methods for testing reliability and validity are available to the researcher.

According to Kelleher (1993), "There is today…a simple and persistent belief that knowledge about people is available simply by asking" (p. 21). There is little doubt, though, that traditional survey methods also have drawbacks. The cardinal conundrum, thus, is this: Can we trust what the respondent tells us she has done, does, or intends to do? Is her reporting of past, present, and future behavior at all reliable? In most situations, it is believed responses are trustworthy and correctly describe behavior and opinions. However, depending on the research environment and the phenomena under investigation, this may not be so. For instance, respondents' inability to remember correctly how much and/or when behavior occurred may lead to invalid results. Moreover, when sensitive topics are under investigation, findings can turn out to be useless due to lack of external validity (Sudman & Bradburn, 1983). In research settings dealing with low-involvement buying behavior, respondents may simply not be able to provide reliable answers to the researcher's questions due to questionnaire ambiguity (Green, Tull, & Albaum, 1988, pp. 261-75; Ackoff, Gupta, & Minas, 1962, p. 179).[2]

Unobtrusive Methods[3]: A Brief Review of their Advantages and Disadvantages

Almost 40 years ago, Greyser noticed that there was "an overdependence on interview (i.e., obtrusive) measures in marketing research" (Greyser 1973, foreword). In a review article on probable marketing research trends in the twenty-first century, Malhotra, Peterson, and Kleiser (1999) provide recommendations concerning future methods for collecting marketing research information: "The challenge for…researchers will be to use…technologies…in natural settings and in less-intrusive ways" (p. 162).

Thanks to recent technological improvements, observational or tracing methods are increasing in popularity. This development has been facilitated by advances and breakthroughs in a variety of fields, like data warehousing, data mining, and neural networks. Retail scanning, first introduced in the mid-eighties, has gained widespread use in marketing and consumer research today (see Walters, 1988, 1991; Walters & MacKenzie, 1988; Kumar & Leone, 1988; Karande & Kumar, 1995; Mayhew & Wiener, 1992).

"Classical" examples of empirical, unobtrusive studies are the following (Webb et al. 1966, 35-52):

- The wear of floor tiles in a museum, indexed by the replacement rate, to determine the relative popularity of exhibits.
- The setting of car radio dials brought in for service to estimate the listening audience of various radio stations.
- Cigarette butts collected after a football game as an indicator of market shares of selected brands.

[2]For good discussions on nonsampling errors, see Bradburn and Sudman (1988, pp. 185-91) and Noelle-Neumann and Petersen (1996, pp. 86-92).

[3]Note that some researchers use terms like "non-reactive methods," "non-intrusive ways," or "observation- techniques," instead of "unobtrusive methods."

In other cases, household garbage and toilet graffiti has been subject to detailed content analysis. The advantages of unobtrusive methods, according to Kellehear (1993, pp. 5-8) are the following:

- The study of actual rather than reported behavior.
- Safety (it is regarded as discreet and harmless).
- Repeatability (re-checking is possible).
- Non-disruptive, non-reactive.
- Research access is easy (cooperation of others is rarely needed).
- Inexpensive.
- Good source of longitudinal analysis.

While disadvantages are the following:

- The original records may be of poor quality or distorted.
- Records are seen from the point of view of the stranger (de-contextualizing).
- Intervening (exogenous) variables may distort data.
- Recording is done selectively and may be biased.
- An over-reliance on a single method.
- The application (interrogation) range is limited (the focus is narrow).

In the remaining part of the present paper, we make the assumption that under certain circumstances it is possible to provide a "valid" estimate of the true, but unknown audience of a print medium (exemplified by sales flyers) by analyzing the presence of fingerprints (FPs) on discarded issues. This approach belongs to the category of unobtrusive research methods. While our research effort cannot claim to be the first of its kind, we believe our approach is facilitated by a different research setting and by using an improved technology, or refined technology, or both. Therefore, we think our findings are worth reporting to readers of a scientific journal.

Prior Efforts of Using Fingerprint Analysis for Measuring Readership

The first published effort to assess the audience of a print medium by analyzing fingerprints can be traced back to 1934. It became known as the "200,000 Fingerprints" study and was conducted by *Time Magazine* (DuBois, 1963). The purpose of the study was to investigate new ways for measuring readership of *Time Magazine*. A sample of magazines was distributed amongst subscribers of *Time Magazine*. All issues consisted of paper that had been exposed to careful chemical manipulation prior to being distributed (a solution of silver-nitrate crystals).[4] The type of paper used was found to be very sensitive to fingerprints, and about 500 were collected some days later. More than 90% of the issues contained fingerprints.

[4] Note that the procedure of exposing respondents to a hazardous solution without informing them beforehand probably would be regarded illegal today, due to laws protecting citizens from environmental and work related risks. Moreover, in many Western countries, laws often severely limit the use of toxic material.

According to DuBois (1963), the cost of the study was $1.25 per fingerprint or $270,000 for the study. This amount corresponds to somewhere between $15,000,000 and $20,000,000 today. Unfortunately, the only available source regarding the 1934 study is Dubois' (1963) two-page summary. It is, therefore, difficult to assess the specifics of the research setup.

From a pure measurement perspective, the reported findings appear to be impressive, indeed. However, some technical comments seem appropriate. First, why should a subscriber pay for receiving a magazine and then not even read it? Second, as far as we can assess, the study has no managerial implications and lacks generalizability.

In a 1976 study, Greene and Maloney considered the problem of finding an alternative method to measure print media audiences, noting that, "Magazine audience research has been going on for forty years without any proof that what readers *claim* they read is what they actually did read" (pp. 9-10). The objective of their study was to find out whether the analysis of fingerprints appearing on magazines could be used as a proxy for readership of the appropriate magazine. Greene and Maloney conducted two small pilot studies. The first test consisted of 3 persons who were asked to leaf through about 100 pages of magazine paper. In a second test, a small sample of magazines was collected from a doctor's office. For analytical purposes, the authors used silver nitrate (now outdated) and ninhydrin, a chemical that was a rather recent chemical development within forensic research at the time of the study.

From a methodological perspective, the pilot studies by Greene and Maloney were characterized as a disappointment. One possible explanation may be that they used silver nitrate (now outdated) for detecting fingerprints. They also employed ninhydrin, but in the 1970s, even forensic experts were somewhat unfamiliar with using this liquid (Crown (1969) mentions it as a new invention). Today, researchers have about 40 years of experience with the chemical (Wiesner et al. 2001). Also, technical equipment for analysis (i.e. the humility oven, see below) was less advanced at that time, compared to today.

However, the major reason for the disappointing outcome of the 1976 study was caused by a simple miscomprehension of how the fingerprints-approach can and cannot be used for measuring readership. The study attempted to identify individual fingerprints (i.e., linking fingerprints to a specific person), and this turned out to be impossible in the experiment (however, fingerprints were identified on around 5% of the considered pages). But, the presence of a positively identifiable fingerprint is not necessary to prove that a given page has been touched by an individual and, thus, probably has been read by that person. One could argue though, that the appearance of a fingerprint on a page only proves the page has been touched, while it does not prove the page has been read. While this argument is valid concerning the front ("1") and rear page ("n"),[5] we do not think the argument holds as long as we are dealing with the rest of the pages (from "2" to "n-1"). Of course, touching a page does not necessarily imply reading it.

[5] Front and rear pages may have been contaminated, either by the postal worker or paper delivery person, or by the person who discarded the flyer, or by both – also in cases in which the flyer never was opened and studied by anyone.

The Empirical Analysis

A sample of flyers was collected in order to assess the feasibility of the fingerprints method in measuring print media readership. Based on the experiences from a pilot study, the data collection was conducted in the summertime, and two samples were collected: one consisting of flyers of newspaper quality and one (smaller) consisting of glossy magazine paper quality flyers. The samples were drawn from a recycling center in the Southern Denmark region.

Throughout the data-gathering process, we sampled several hundred flyers from containers. Because of limited analytical resources, we ended up scrutinizing 117 flyers. With few exceptions, households had received the flyers between one week and one month prior to being sampled. The flyers emanated from seven different advertisers. Usually, but not always, households receive flyers originating from the same advertiser on the same day, referring to the same future period of time concerning offers (typically the following week). The 117 items were distributed on 11 different days during the period from May through September. On most days, it was nice weather, sun and few or no clouds. On no one of the days it was raining.

From a technical point of view, our sampling method can be characterized as judgmental sampling. Thus, the selection criteria were biased toward flyers emanating from certain producers, where we had been relatively successful at finding fingerprints during the pilot studies.

Essentials of Measuring Fingerprints on Paper

Next, the sample was submitted to, and afterwards analyzed by, one of the authors who works at the headquarters of the Danish Commissioner of Police. The Commissioner's office includes a department for analyzing FPs. This department contains a small office with employees that specialize in locating FPs on paper. Usually, these experts are looking for FPs on bad checks, forged banknotes, etc. However, they do have the expertise to analyze a wide array of paper, including sales flyers for human FPs. FPs appear because people sweat. 98% of human sweat consists of water and 2% of amino acid. The water must evaporate prior to analysis, since only the "pure" amino acid is traceable. Sweating is an individual characteristic. Typically, fat, young, temperamental, stressed, and nervous individuals sweat more than people not possessing these characteristics. Elder people tend to develop dryer and "leathered" hands, implying that their FPs are difficult to trace (due to natural reasons old—retired—persons seldom get stressed). Sweat is known to correlate with season: People obviously are sweating much more on a hot, summer day compared to a cold, winter evening. To complicate matters, two individuals having (1) comparable physical and psychological characteristics, and (2) being exposed to the same conditions (temperatures) may differ considerably with regard to how much sweat is secreted by the body's lymph nodes.

Analyzing FPs on paper is a rather complicated procedure. First, all pages of a flyer need to be separated. Second, every page has to be dipped into a liquid called ninhydrin (previously used in the 1976 study). Third, the wet page must be dried in a so-called test-chamber, a device that resembles a big microwave oven. Finally, each page has to be scrutinized for FPs appearing on the page (a magnifying glass, or even a microscope, may facilitate and support the process of inspection, but is rarely necessary).

Unlike in a criminal investigation, where it is absolutely crucial for the prosecution to produce evidence in the form of a positive identification of a FP, we need not bother with the laborious process of determining the uniqueness of an individual FP (see the discussion above). Thus, we are unable to tell if a FP belongs to, say, a teenage girl or to an adult male. Furthermore, we do not know whether two FPs found on a given flyer belong to the same individual or if they emanate from two different persons in the household.

Based on prior behavioral studies and experience, one of the authors (the FP expert) has a reasonable idea about where to look precisely on a page for FPs (far right, middle, and bottom of the right, or odd, page; far left, middle, and bottom of even, or left, page). The necessary and sufficient research question for us is this: Does the page contain a FP or not? It is assumed that a person has been exposed to a page—and to all other pages—provided that at least one valid FP is found on one of the pages (of course, the validity of this supposition can be questioned; see the discussion on the OTS concept above).

In most cases, FPs only appear a few times across a sales flyer. If the flyer consists of, say, 32 pages, then one typically will uncover only 2 to 4 FPs across all pages. Typically, more FPs will be found on the first pages as compared to the last ones. Nevertheless, we find it reasonable to assume that the person who has left, say, one or two FPs on the first 10 pages, indeed has been flipping through the whole flyer, although no physical traces are to be found on the remaining 22 pages. It should be noted that several large supermarkets tend to place dairy products like bread, meat, vegetables, diapers, and toilet tissue in the second part of the flyer. While the week's top offers are displayed on the front (or rear) page, the consumer needs to go to the final pages to learn about dairy products that are on sale in the coming, or present, week. The first part of this flyer typically contains advertisements for clothes, shoes, hardware, toys, electronics, and personal care products.

For methodological reasons, the front and rear page of each flyer need to be excluded from analysis since these pages may have been touched (contaminated) by the postman or by the person in the household who carried the flyer to the recycling center. We cannot be sure the person who discarded a flyer has read it.

Research Questions

As noted, the usual obtrusive survey method is still the prevailing method for measuring readership. Whenever there are potential imperfections attributed to a specified measurement method, the alternative technical approaches must be welcome. For instance, the appearance of store audits and TV-meters were welcomed because they represented serious measurement alternatives to diary panels and to CATI-based surveys, respectively.

In this paper, we investigate whether readership of sales flyers can be measured by way of identifying fingerprints across the pages of a flyer. It appears to be of little interest to measure whether a subscriber to a paid-for publication actually reads it or not. Everything else being equal, the subscriber will read it (there may be several readers per issue, but that is a different question).

The *Time Magazine* study (Dubois, 1963) was based on subscribers and, therefore, is not of interest to replicate in any way. The research by Greene and Maloney (1976) was not based on subscribers, but on magazines that might or might not have been read. Thus, the study might be

somewhat more interesting to replicate. Unfortunately, it was (a) an unrepresentative pilot study, (b) carried out employing a technology that was unrefined at the time, and (c) regarded as a disappointment because of the inability to identify individual fingerprints.

We think that (a) it is possible to collect a representative sample of flyers, (b) the relevant technology for identifying fingerprints has improved markedly since 1976, and (c) it is unnecessary to identify individual prints. Thanks to (b), we assume it will be possible to find fingerprints on significantly more pages of issues in a new study than was the case in the study by Greene and Maloney (1976).

Proposition 1: If a sample of issues (i.e., sales flyers) is collected and analyzed by way of state-of-the art technology, it will be possible to find significantly more fingerprints than was possible in the study by Greene and Maloney (1976), which found fingerprints on about 5% of pages.

Even though every page of an issue has been touched by a reader's fingers, only a small percentage of these physical contacts between page and finger materialize as a fingerprint (source: the forensic expert among the authors). Therefore, there is a chance that readership of an issue has happened although no fingerprints can be identified.

If a flyer has been read and one or several valid fingerprints are found, this is a correct registration. Also, it constitutes a correct measurement to fail at finding fingerprints in a situation where the flyer has indeed not been read. Theoretically, it is possible to find fingerprints within a flyer although it was not read by anyone. This corresponds to the statistical Type II error of falsely accepting H-0. We do not think that this type of error constitutes a serious problem in the context of our study. It is the last possibility that should make us worry since it implies a downward bias (underreporting) of true readership: A flyer has been read, but we fail to identify fingerprints. In this case, we commit a Type I error: We reject H-0 although it is indeed true. If our measurement approach results in many cases of Type I errors, then we will underestimate true readership. However, we do not think that Type I errors will seriously bias our measurements.

Proposition 2: Generally, fingerprints can be used as a valid method for measuring readership of sales flyers.

Historically, advertising researchers and practitioners have been interested in the optimal placement of an advertisement within the pages of a magazine or newspaper. Two frequently addressed questions are:

A. Does a right-hand page—everything else being equal—draw more attention than a left hand-page?
B. Does it matter if an advertisement is placed, say, on one of the first pages, somewhere in the middle, or on one of the last pages?

Question A: Employing a regression model with Starch readership scores as dependent measure and a lot of factual data as predictors (size, color, etc.), Diamond (1968) found that right-hand page advertisements received higher readership than left-hand pages (unfortunately, Diamond's

paper did not contain any statistical figures like R^2, significance of parameters, etc.). According to Consterdine (1999), available data on the issue differ somewhat: Whereas Magtrack indices (UK) show that right-hand page advertisements generate 11% more recall, Roper's Starch based indices (US) show no difference at all. As a matter of fact, many publishers of newspapers and magazines charge an extra 5-15% for placement on a right-hand page. Without doubt, this is because publishers believe right-hand pages generate more attention, exposure, and recall than do left-hand pages. We tend to agree with publishers.

Proposition 3: More fingerprints will be found on right-hand pages than on left-hand pages.

Question B: The issue is discussed in Sissors and Baron (2002) and in Lugovtsova (2006). Several sources (Engel & Blackwell, 1982, p. 292), Diamond (1968), and Consterdine (1999) state there is a correspondence between readership and where in the magazine or newspaper the advertisement is placed: The earlier the advertisement appears, the more readers will read it and recall it, and vice versa (except for inside and outside back cover). Roper Starch research agency reports the following index measures: first third of magazine: 115; middle third: 109; last third: 100 (Consterdine, 1999, p. 47). We expect to find directional support for the latter figures.

Proposition 4: Regarding detection of fingerprints, the following will hold: Sum first third > Sum second third > Sum last third.

The reader may wonder why we want to compare the findings from our fingerprint study with results based on the traditional measurement approaches—Prepositions 3 and 4 (recall, that we refer to flaws of these methods earlier in our paper). The simple reason is we have no other data on readership to compare our findings to.

Findings

While the number of issues collected in the empirical phase (n = 117) appears to be modest, the number of pages examined is 4,370 (4,604 including front and rear page). Analyzing several thousand pages for fingerprints appears to be a time-consuming task. But, one should remember our study was designed as a basic research project. At the end of the paper, we make recommendations with regard to how the research design can be simplified, formalized, and sped up considerably, such that it can be used in applied settings.

On a general level, only one third of the issues (38 of 117) included at least one valid fingerprint (see Table 1). However, the relative number of fingerprints varied substantially across categories. It is worth noting, but hardly surprising, that the flyer containing most fingerprints (absolutely as well as relatively) was also the one having the most pages. Fingerprints were traced on 9% of all pages scrutinized (see column VIII of Table 1). This is a conservative estimate, though. In sum, we analyzed 2,950 pages (across 25 issues) of the flyer *Idényt*. In total, we identified 324 fingerprints. However, the 2,950 pages is a "gross" figure, since it also includes the six issues corresponding to 708 pages (six issues x 118 pages) where no fingerprint was found at all. Was this because we failed to identify prints although the issues had been read, or was it because the issue was never read? We cannot know and assumed our analysis did not contain

errors of the Type II category. In such a case, the 324 pages with fingerprints are to be divided with 2,242 (2,950-708) "net" pages. In that case, we found fingerprints on 15% of pages of the flyer *Idényt*. If we repeat this computation for all issues, we find that 16% of issues contain fingerprints (Table 1, column IX).

So, depending on whether we use a conservative (9%) or a liberal (16%) definition of readership, the number of fingerprints we found exceeds that of Greene and Maloney (1976) with a factor between two and three: "[The expert] found smudges on 5% of observed pages" (p. 49). If we look at the figures for the flyer *Idényt* and employ the liberal criterion (column IX of Table 1), we find 15% readers with a 95% confidence interval stretching from 8% to 22%. Neither this nor the corresponding 99% interval (going from 6% to 24%) includes the 5% reported by Greene and Maloney. Therefore, we find proposition 1 to be confirmed.

Our proposition 2 states the fingerprint method is a valid method for measuring readership of sales flyers. Basically, verification or falsification of this proposition will be founded on subjective criteria. Our empirical sample consists of 117 issues covering 4,604 pages (4,370 valid pages). Two-thirds (67%) of the pages being analyzed refer to 25 issues of one producer's advertising publication, *Idényt* (New Ideas). Table 2 provides a fingerprint analysis of the 19 issues of *Idényt* that contain at least one fingerprint. Each digit "1" indicates whether or not at least one valid fingerprint has been identified on the appropriate page. The 2,242 pages (19*120 minus 19 times* [front+rear page]) contain 324 pages with fingerprints (14.45%). The issues contained between one and 68 pages with fingerprints (average = 17.1, standard deviation = 16.2).

For the moment, we assume it is possible for a consumer to flip through or read a flyer of less than 50 pages without leaving any trace of fingerprints (Type II error). Our analysis contains data providing some support to this assumption: by inspecting Table 1, we note that 19 out of 25 issues of the flyer *Idényt* carried fingerprints. However, in 4 of the 19 cases, the first fingerprint was found on page-numbers higher than 24. Consequently, if our analysis had been limited to 24 pages, we would not have identified them as readers. In one case, the first fingerprint appeared on page 94. In another case, the first fingerprint appeared on page 25 and still we were able to detect no less than 32 fingerprints across pages 25-119.

To sum up, we think the fingerprint method is a rather valid method for voluminous magazines like flyers and catalogues having 50+ pages. We find it relatively unlikely for the publication to have been flipped through or read without any single trace left of a fingerprint on some of the pages. For flyers containing few pages, the picture is less clear, since our results indicate a flyer of this size could apparently be flipped through or read without leaving a fingerprint. In such a case, a Type II error may seriously underestimate true readership. So, proposition 2 appears reasonable for voluminous sales catalogues and magazine-like flyers, but probably not for small leaflets and advertising brochures.

In column X of Table 1, we have estimated readership measures, solely based on the fingerprint approach. According to a recent commercial study by Danish Gallup (November 2006), 56% of respondents report to read flyers for supermarkets and discount stores "every time or almost every time," 23% report to read them "now and then," while 21% state that they "never or almost never" read them. Data from a major supermarket chain, Super Brugsen, and from a major grocery discount chain, Netto, are included in Table 1. Comparing Gallup's findings

Table 1: Fingerprint Analysis of a Sample of Flyers

	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII
Producer/ Distributor	No. of Issues	+ FP	- FP	Valid pages of issue	Tot. no. pages (I x IV)	Pages of issues with FP (II x IV)	Total no. valid FP	Fraction of pages with FPs (VII/V)	Frac. FP issues (VII/VI)	"Reader-ship" (II/I)	FPs right-hand pages	FPs left-hand pages
Idényt	25	19	6	118	2950	2242	324	0.11	0.15	76%	219	105
Super Brugs	16	5	11	22	352	110	34	0.09	0.31	31%	25	9
Real	13	4	9	22	286	88	11	0.04	0.13	30%	9	2
Netto	44	5	39	14	616	70	12	0.02	0.17	11%	6	6
El-Køb	9	3	6	6	54	18	6	0.08	0.33	33%	6	0
Intersport	6	1	5	4	24	4	1	0.03	0.25	17%	1	0
Kold. Storc.	4	1	3	22	88	22	7	0.07	0.32	25%	6	1
Totals	117	38	79	-	4370	2554	395	0.09	0.16	-	272	123

Table 2: Fingerprint Analysis of 2242 pages (19 Issues of Danish Flyer Magazine *Idenyt*

Issue No.	"1" indicates at least one fingerprint on the individual page, while "0" indicates no fingerprint on the specific page	No. FPs	Right FPs	Prob.
01	0000000000000000000000000000000000000000100000000000000000000000000000000000000000

(based on 1041 CAPI-interviews) to ours (see Table 1), we note our figures are much lower (31% and 11% respectively) than the corresponding figures provided by Gallup. We should keep in mind though that the two measurement approaches differ considerably. Note also that our measure is a conservative one: There may be more than one fingerprint, or reader, per page.

Our own figures regarding the two flyers may be underestimating the true, but unknown, readership. Obviously, the fingerprint-based estimates are downwards biased, implying readership may have occurred without leaving any observable trace on the surface of the pages (Type II error). A likely explanation to the absence of fingerprints is that both flyers contain relatively few pages (24 and 16 respectively, including front and rear page).

So far, using the survey method for measuring readership of flyers makes it difficult (impossible) to provide valid readership figures that are chain-specific. Danish Gallup, in its published annual study, asks respondents about their readership of flyers across generic categories, like "supermarkets," "photo-shops," "beauty shops," etc. Many consumers will not be able to tell which specific flyer they have been reading. At best, they are able to remember the category.

While one could easily ask specifically for branded chains, or even for individual retail stores, Gallup usually avoids doing so because they worry about question-ambiguity. Due to the fact that flyers are distributed without charge, it naturally follows that they are usually regarded as low involvement media. Maybe the consumer can recall flyers of a specific retailer, but most probably cannot recall the specific issue/page that featured a certain advertisement. The ambiguity phenomenon does not affect the fingerprint-approach since it is per se carried out on the flyer/chain-specific level. From a different source, we know 72% of Danish households receive Super Brugsen, while 88% receive Netto (GfK Denmark, October 2000). While this data is chain specific, receiving a flyer does not tell us anything about whether it is being read.

However, according to a commercial study conducted for *Idényt,* the flyer is read by 60.6% of adult Danes (unpublished Gallup study, 2001). The 60.6% is to be compared to our estimate of 76% (Table 1, column X). Presuming our readership estimate (76%) is correct, the interview-based figure used by the publishing company's management is downwards biased.[6]

Obviously, we possess no true readership figures, and, therefore, it is difficult for us to validate our method against true scores. However, we could try to compare our findings with results generated by the survey approach. Unfortunately, methodological differences make a face-to-face validation of our method vis-à-vis the survey approach difficult. The survey method may provide more valid results for small sales brochures and leaflets. For voluminous flyers, we think the fingerprint method generates more valid results. Respondents in a survey sometimes will be low involved and, therefore, provide incorrect responses. This potential bias does not apply to the fingerprint approach. Also, the fingerprint method appears to be better at measuring flyers from a specific retailer.

Proposition 3 stated we would find more fingerprints on right-hand pages than on left-hand pages. As can be seen in Table 1, columns XI-XII, we found significantly more fingerprints

[6] According to Gallup's unpublished study, 28% of *Idényt* readers are older than 60 years, while 10% are younger than 30. While 72% of the +60's report readership, the corresponding figure for -30's is 39%. Since sweat is believed to correlate negatively with age, these data ought to bias the fingerprint data downwards (not Gallup's data) because the flyer has many old readers. They do not sweat much, and their 'dried leathered' fingers make it difficult for the expert to identify their fingerprints.

on left-hand pages as compared to right-hand pages ($p < 0.001$). The ratio was more than 2:1. If we inspect Table 2, we notice there were 19 issues across 2,242 pages with at least one fingerprint; 2,242 pages equals 1,121 left-hand pages and 1,121 right-hand pages. On left-hand pages, we found 105 fingerprints, and on right-hand pages we identified 219 prints. This corresponds to 9% (105/1121) and 20% (219/1121), respectively.

So, intuitively, we find proposition 3 confirmed. However, in the present case we need to be very cautious because an overrepresentation of fingerprints on right-hand pages may be attributed, at least partially, to technical causes (different approaches to flipping pages, discussed in much more detail by the authors elsewhere).

Although peoples' techniques regarding the flipping process vary from person to person, three different approaches appear to dominate:

1. The page is flipped by placing the page between the thump (right-hand/odd side) and the index finger (left-hand/even side) of the following page (typically in the low right corner) – assuming the right hand is used.
2. The page is flipped by placing the page between the index finger (right-hand/odd side) and the thumb (left-hand/even side) of the following page (typically in the lower right corner) – assuming the left hand is used.
3. The left hand is placed at the lower right corner of the right-hand page (odd side), and then the thumb is used to push the lower left corner of the page upwards along the main diagonal.[7]

In the first two cases, the probability of leaving a fingerprint should be about the same for right-side and left-side pages. Regarding the third approach, there is a fair chance that only the right (odd) page of a flyer is touched during the flipping process.

According to proposition 4, there is a correspondence (negative correlation) between the page number of a flyer and the probability of being read by the consumer. Transformed to our research problem this implies an analysis of the first pages of a flyer will reveal more fingerprints than will the last pages. This problem can be analyzed by looking at Table 2. As noted, the table displays pages having at least one fingerprint across the 19 issues *118 valid pages. The summary row shows how many of the 19 issues had a valid print on each of the 118 pages. For instance, no print was found on page 002, but four issues (14, 16, 18, and 19) had valid prints on page 003 and so on. Across all pages of the flyer *Idényt,* we found 324 fingerprints. Of these, 115 were found in the first third, 102 in the middle third, and 107 in the last third. An ANOVA analysis treating the three categories as predictors and the number of fingerprints in each category as dependent measure was not nearly significant ($p = 0.70$). The index provided by the Roper report (see above) was as follows: first third of magazine: 115; middle third: 109; last third: 100. The first third of our flyer pages show marginally higher readership than the subsequent thirds. Note also that our figure regarding the last third is slightly higher, not lower, than the middle third. To sum up, proposition 4 is not supported. According to the fingerprint method, readership does not vary significantly across the pages of a flyer.

[7]According to self-reports, about 90% of Danes claim to be primarily right-handed. But, we doubt the issue of being right or left handed plays a significant role in the present case.

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Discussion Questions

1. It is argued in the paper that if a fingerprint appears on a page, then the person has been exposed to the page and to the advertisements appearing on the page (that is, he or she has seen it). Do you think this is reasonable supposition or not? Why or why not?

2. The paper investigates the importance of placing an advertisement on the right versus on the left page and of placing it in the beginning, in the middle, and at the end of the sales flyer. Results on the findings also are presented. Do you think this issue is of critical importance for the sale of a brand? Why or why not?

3. Do you think the fingerprint method will be applied by market research agencies as an alternative method for audience measurement of sales fliers, say, by 2020? Why or why not?

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Enhancing Women's Integration in Labor Markets – A Global Economic Interest: The (Limited) Role of International Economic Organizations

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Abstract

In recent years, international economic organizations realized that the utilization of the most common resource of growth—women's work—is an important growth engine that may pull countries out of the global economic crisis that began in 2008. Optimal utilization of women's work depends on the achievement of gender equality at work, and on the creation of a supportive environment in which women may combine work with family responsibilities. How to accomplish this is subject, to a great extent, to differences in culture and tradition between different countries.

The formation of a supportive environment for women's work should take place through both domestic and international regulation. Action at both levels is complementary. This article examines the activity of international economic organizations to enhance gender equality at work, concluding that there is much more to be done, and suggesting further action by these organizations to improve results.

Keywords

international organizations, gender, international economy, international law

Introduction

The global economic crisis, ongoing since 2008, does not seem to be coming to an end. Overcoming the crisis depends, to a large extent, on enhancing growth. Enhanced growth may be achieved by utilization of production factors: capital and labor. Capital includes natural resources, such as oil, diamonds, etc., which are not available in each country. It further includes investment money that may be lacking in times of crisis. Labor potentially includes all available workers—men and women. This is a resource that exists in each country. However, empirical

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research shows it is not utilized efficiently. This conclusion is particularly valid for women's work. Thus, it is gradually realized that more efficient utilization of women's work may become a key factor for overcoming the global economic crisis.

In September 2011, at the Asia Pacific Economic Cooperation Convention, Hillary Rodham-Clinton (2011), the United States Secretary of State, said the following:

> To achieve the economic expansion we all seek, we need to unlock a vital source of growth that can power our economies in the decades to come. And that vital source of growth is women. With economic models straining in every corner of the world, none of us can afford to perpetuate the barriers facing women in the workforce. Because by increasing women's participation in the economy and enhancing their efficiency and productivity, we can bring about a dramatic impact on the competitiveness and growth of our economies. (n.p.)[9]

However, empirical research seems to reflect that while many countries enjoy progressive legislation, providing for gender equality at work, practice is far from achieving this goal (see, e.g., Seinsbury, 1996). In fact, women wishing to work are facing the "double burden syndrome": the combination of work and domestic responsibilities set on women, the lack of governmental support to face this difficulty in terms of infrastructures such as daycare centers, tax policies that encourage women's participation in the labor force, the unsuitability of work models, historically designed by men, to the difficulties specified[10] and encountered by working women as well as cultural and social burdens (Desvaux, Devillard-Hoellinger, & Baumgarten, 2007; see also Munin, 2011; Shachar, 2008). These practical difficulties turn into sources of psychological obstacles, encouraging women to opt out of business careers (Desvaux, Devillard-Hoellinger, & Baumgarten, 2007).

Although the major playing field for implementing equality between men and women at work is the national level, international organizations seem to have been involved in regulation of this subject since the Industrial Revolution that took place between the end of the 19th century and the beginning of the 20th century.[11] This revolution enhanced women's access to education and triggered their struggle toward the improvement of their working conditions and their right to vote (Landau & Beigbeder, 2008, p. 3).

It is, thus, only natural to ask, to what extent international economic organizations play—or should play—a role in promoting this goal, and what added value their contribution may have on the efforts made by countries. Section 1 of this article describes current efforts made by international economic organizations to enhance women's integration into labor markets. Section 2 analyzes the effectiveness of these efforts. Section 3 suggests manners of improving this

[9] For supportive empirical research, reflecting the impact of gender equality at the micro and the macro level, see Sinha, Raju, & Morrison (2007). See also *Women in the Workplace* (Workplace Performance Technologies, 2011).

[10] See a discussion on the responsibilities of employers to change work models versus the responsibilities of men to fulfill their family responsibilities (Selmi, 2008). See also Smith-Doerr (2004).

[11] The first international convention related to the protection of women was adopted in 1910: the International Convention for the Suppression of the White Slave Trade. Between the two World Wars, the League of Nations adopted some legal instruments referring to the equality of women (Landau & Beigbeder, 2008, pp. 3-4).

action, both in substantial terms and in terms of allocation of efforts. Section 4 concludes.

Section 1: The Efforts of International Economic Organizations to Enhance Women's Integration in Labor Markets

This section describes the activities of some international organizations aimed at enhancing the integration of women in labor markets, including the United Nations (UN),[12] the International Labor Organization (ILO),[13] the Organization for Economic Cooperation and Development (OECD),[14] and the World Bank.[15]

Basic Role of the Organizations Examined in the International Arena

Although all four organizations act to enhance equality at work between men and women, each of them has a different motivation stemming from its role in the arena of international organizations. For instance, while the UN is an umbrella organization for all international activities, the other organizations examined have more specifically defined roles. The major objective of the ILO is the global regulation of work conditions to create a decent work environment. It, thus, concentrates on labor law. The World Bank, in contrast, is an economically-oriented organization, concentrating on financial assistance to countries (mainly developing countries[16]), financial consulting to countries aimed at their financial stabilization, and the issue of statistical and economic surveys aimed at creating empirical basis for global economic decisions. While the World Bank, as well as the ILO and the UN, includes developed and developing Member States, the OECD basically is confined to developed Members. However, the OECD works in collaboration with many non-Members to promote shared goals. The OECD is also an economically-oriented organization, and its work is in many ways complementary to the work of other international economic organizations.

[12] The United Nations is an international organization founded in 1945 after the Second World War, committed to maintaining international peace and security, developing friendly relations among nations and promoting social progress, better living standards and human rights. Nowadays there are 193 member states in the UN (United Nations, 2012).

[13] The ILO, an organization with 183 member states, was founded in 1919, as part of the Treaty of Versailles that ended World War I, to reflect the belief that universal and lasting peace can be accomplished only if it is based on social justice. The ILO became a specialized agency of the UN in 1946 (ILO, 2012b).

[14] The Organization for Economic Cooperation and Development (OECD), gathering 34 developed economies, was founded in 1961, replacing the OEEC that was established after World War II as part of the Marshal plan of reconstructing Europe after the war (OECD, 2012a).

[15] The World Bank was founded after World War II. It provides loans to developing countries for capital programs. Its official goal is the reduction of poverty. It is divided to two institutions: The International Bank for Reconstruction and Development (IBRD), having 187 member countries, and the International Development Association (IDA) having 171 members (World Bank, 2012a).

[16] But not only developing countries: The World Bank is now financially supporting the Eurozone Member States which are in financial difficulties, such as Greece, Spain, Portugal, Italy, etc.

Motivation to Address Gender Equality at Work

The different motivations of the four organizations examined to address gender equality at work are drawn from the different roles of these organizations in the international arena.

The UN's motivation to deal with gender equality is part of its efforts on the abolition of all forms of discrimination.

The ILO focuses on labor discrimination. It was founded against a backdrop of worker exploitation in industrializing nations and the increasing understanding of the world's economic interdependence, suggesting a need for cooperation to obtain similarity among working conditions in countries competing for markets.[17] Thus, its major motivation was, and still is, the promotion of social justice and decent work terms. It refers to gender equality as a social and constitutional aim (ILO, 2012a).

The other two organizations seem to be more interested in the economic aspects of gender equality. However, while the OECD seems to be looking at that subject from the point of view of developed countries, the World Bank seems to focus more on the aspects that are of interest to developing countries.

Instruments of Action

The four organizations examined use different instruments to achieve their goals. The UN mainly acts through international Conventions that become binding upon ratification, and political resolutions. The UN further sets goals that are not legally binding, but which call for joint action and may set the basis for further, more binding instruments, as well as peer pressure.[18] The Millennium Goals, referring *inter alia* to gender equality, set an example for this style of action.

The ILO mainly adopts international standards in the form of Conventions and Recommendations. Conventions become binding on every Member State upon ratification. Recommendations are non-binding and, hence, need not be ratified. These norms are translated further into domestic legislation of the Member States. The legal instruments of the ILO operate in a manner similar to that of the UN's legal instruments: There are monitoring mechanisms, based on reporting by the Member States, and reviews by the ILO bodies (with an option for public criticism by employers' or workers' associations, in addition to other Member States and the ILO itself).[19] In addition, ILO Conventions set obligatory legal standards for the Members that ratified them. The infringement of these standards by Members is subject to a review mechanism, which includes a complaint by another Member State and consideration of it by the Commission of Inquiry, followed by a report that includes findings and recommendations that then are communicated by the Director General to the Governing Body and to each of the governments concerned. These governments have the option of either accepting the report or

[17] Countries were concerned that if only they adopt social reforms they would find themselves at a disadvantage with their competitors. For that reason, a global arrangement was important (Landau & Beigbeder, 2008, note 5, p. 12).

[18] In principle, these resolutions are politically binding, but their accumulative effect may imply for legal consequences as well.

[19] For details, see Landau & Beigbeder, 2008, note 5, pp. 14-16.

referring the matter to the International Court of Justice, which makes the final decision (International Labor Organization's Constitution, Articles 28, 29, 31). Failure by a Member State to carry out a decision made by either the Commission of Inquiry or the International Court of Justice may be followed by a recommendation from the Governing Body to the Conference to take "such action as it may deem wise and expedient to secure compliance therewith" (ILO Constitution, Article 33).

The OECD develops legal instruments, most of which are voluntary and enforced by peer pressure. In addition, the OECD is one of the most important resources for global economic statistics and data. It publishes empirical, economic research, which serves as a platform for decision-making.

The World Bank's contribution to the promotion of gender equality is expressed, *inter alia,* by empirical reports that describe the situation in different countries comparably. This data gathering is an important first step because it forms a basis for decision-making. It further integrates this goal into the World Bank's financial and consulting activities with the Member States.

Recognition of the Economic Benefit of Gender Equality

The economic benefits of gender equality may not be the main motivation when addressing gender equality at work by some of the international organizations discussed. However, most of them recently seem to have realized the link between the two.

The UN Millennium Declaration, which is the basis for the Millennium Goals, refers to human rights, but also to economic goals, such as eradicating poverty and making globalization fully inclusive and equitable.[20] This context reflects the close link between gender equality and these economic goals.

The OECD believes that due to the relatively equal size of the male and female global population, the enhancement of women's participation in the workforce may substantially contribute to global growth. The OECD explicitly realizes that none of the Millennium goals set forth by the UN will be achieved unless there is greater equality between women and men, and increased empowerment of women and girls (Organization for Economic Cooperation and Development, 2012).

In May 2011, the OECD published an interim report referring to gender equality in education, employment, and entrepreneurship. The report realized the economic importance of gender equality.

> Reducing persistent gender inequalities is necessary not only for reasons of fairness and equity but also out of economic necessity. Greater economic opportunities for women will help to increase labour productivity; a higher female employment will widen the base of taxpayers and contributors to social protection systems which will come under increasing pressure due to population aging. More gender diversity would help promote innovation and competitiveness in business. Greater economic empowerment of women and greater gender equality in leadership are key components of the OECD's wider agenda to develop

[20] Resolution adopted by the General Assembly 55/2. *United Nations Millennium Declaration,* in particular I(6) and III.

policies for stronger, better and fairer growth. (OECD, 2011a, p. 2)

The World Bank also realized that "inequality is manifestly unfair. It is also bad economics: Under-investing in girls and women puts a brake on poverty reduction and limits economic and social development" (World Bank, 2012c, n.p.).

The ILO also realized that "work is a source of…economic growth," while the achievement of decent work, an agenda encompassing gender equality at work, leads to fair globalization, the reduction of poverty, and enhancement of sustainable development (ILO, 2012a).

The Contents of Instruments Developed by International Organizations

The general principle of gender equality. Equality between men and women was recognized by the UN Charter, which came into force in 1945, and the UN created a Division for the Advancement of Women in its Secretariat (Landau & Beigbeder, 2008, p. 5). The principle of equality between men and women was recognized by the Preamble to the Declaration of Human Rights, adopted in 1948; by the International Covenant on Economic, Social, and Cultural Rights, and by the International Covenant on Civil and Political Rights, both adopted in 1966; by the 1967 Declaration on the Elimination of Discrimination against Women, followed by a binding Convention on the Elimination of all Forms of Discrimination against Women, which entered into force in 1981; by the Declaration on the Elimination of Violence against Women, adopted in 1993, and by the Optional Protocol to the Convention on the Elimination of Discrimination Against Women, adopted in 1999.

During the years, the UN also held conferences on the subject, calling time and again for the eradication of all forms of discrimination against women (Landau & Beigbeder, 2008, pp. 8-9).

The notion of equality between men and women already was reflected in the Declaration concerning the ILO's aims and purposes, adopted in 1944. In 2007, the ILO report adopted gender equality as a universal strategic goal, turning it into a mainstream objective of its Decent Work Country Programs (Landau & Beigbeder, 2008, p. 252).

Equality at Work

The UN Instruments

Some of the UN instruments specifically refer to equality at work. Thus, for example, Article 7(a)(i) of the International Covenant on Economic, Social, and Cultural Rights provides that the States that are parties to it should ensure equal pay for equal work of men and women. Article 10(2) of that Convention further provides for special protection to working mothers during a reasonable period before and after childbirth. Review of States' implementation of these principles is subject to their reporting to the UN, which may set the basis for study and recommendation. Stronger legal rights are included in the Convention on the Elimination of all Forms of Discrimination against Women, which specifically establishes that the right to work is an inalienable right of all human beings, and provides for equal employment opportunities,

selection criteria, and entitlement to all the rights that form part of fair and decent employment. This Convention requires the State Parties to establish a strong domestic implementation and enforcement mechanism. UN review is achieved through reporting obligations of the State Parties (Landau & Beigbeder, 2008, pp. 6-7). The Optional Protocol, adopted in 1999, allows, after the exhaustion of all available domestic remedies, individuals or groups of individuals who claim to be victims of a violation of a right set forth by the Convention to submit a communication to the Convention's Committee, which may ask the State Party involved for explanations and even to provide for a remedy by that State.

With regard to the new millennium, the UN defined eight millennium goals, one of which is gender equality, which the UN aims to achieve by 2015.[21] Despite the general address to gender equality, a more detailed examination reveals that the UN aims to concentrate on women's education, and health and equality at work, realizing the link between these goals:

- For girls in some regions, education remains elusive.
- Poverty is a major barrier to education, especially among older girls.
- In every developing region except the CIS, men outnumber women in paid employment.
- Women are largely relegated to more vulnerable forms of employment.
- Women are over-represented in informal employment, with its lack of benefits and security.
- Top-level jobs still go to men — to an overwhelming degree.
- Women are slowly rising to political power, but mainly when boosted by quotas and other special measures. (United Nations, 2010a, n.p.)

The ILO Instruments

By definition, the ILO has developed the most comprehensive set of legal instruments addressing gender equality at work.

Equal pay. ILO conventions, in particular the ILO Convention No. 100 on Equal Remuneration (1951), provide for equal pay for equal work with equal value. This standard is based on the wide legal concept of "remuneration" developed by the ILO, and is applicable to laws, regulations, legally established machinery for wage determination, and collective agreements between employers and workers. The Convention is supplemented by Recommendation No. 90 (1951), which provides for the application of these principles to employees in government departments and agencies, and to those whose rates of remuneration are subject to statutory regulation or public control. This Recommendation further calls for action to be taken

> as necessary, to raise the productive efficiency of women workers by providing facilities for vocational guidance or employment counselling, and for placement; by providing welfare and social services which meet the needs of women workers, particularly those

[21] The other goals seem to support this goal, including end of poverty and hunger, universal education, child health, mental health, combat AIDS/HIV, environmental sustainability, and global partnership; see the *Millennium Development Goals* (United Nations, 2010b).

> with family responsibilities; and by protecting the health and welfare of women. (Landau & Beigbeder, 2008, p. 18)

The concept of "work of equal value" is broadly interpreted to imply not only to cases where women perform the same job as men but also when they perform different jobs that are comparable in terms of their characteristics (e.g., school meal supervisors, predominantly women; and garden and park supervisors, predominantly men). No characteristics for comparison are specified by the Convention, but the comparison has to be objective (Landau & Beigbeder, 2008, pp. 68-69). However, the sad reality (further described below through reports from other international organizations) is that equal pay for the same job for men and women is still uncommon.

Equal treatment. The ILO conventions provide for equal opportunity and access to jobs in general by forbidding direct and indirect discrimination. Discrimination is widely defined by the ILO Convention No. 111 on Discrimination (Employment and Occupation) (1958) to include sex discrimination. This Convention is not open for reservations by Member States who ratify it.

> They must repeal any statutory provisions and modify any administrative instructions or practices which are inconsistent with this policy, and are under a duty to enact legislation and promote educational programmes that favour its acceptance and implementation, in cooperation with national employers' and workers' organizations. (Landau & Beigbeder, 2008, p. 98)

This Convention is supplemented by Recommendation No. 111 (1958), which specifies, in detail, the ways to implement the Convention. It suggests, *inter alia,* that domestic agencies will be established to foster public understanding of the principle of non-discrimination and to examine complaints regarding infringement of it.

The principle of equal treatment at work, set forth by Convention No. 111, provides a legal source for the prevention of sexual harassment at work, which is perceived as undermining equality at work (Landau & Beigbeder, 2008, pp. 216-217).

Protective measures for women. While women were formerly considered the weaker sex and responsible for bearing traditional family duties, they are now regarded as equal workers who should be treated without discrimination when compared to men, and should be allowed to work at night, in underground mines, carry heavy weights, and more (Landau & Beigbeder, 2008, p. 129). Thus, the adoption of the principle of equal treatment for men and women, as accorded by ILO law, substituted the notion of implementing protective measures for women at work, as these were counter-productive and limited the job choices available to women in the workplace (ILO, Conventions No. 155 and No. 171; Landau & Beigbeder, 2008, pp. 17-18).

The protection of pregnancy, maternity, and parental leave. Two aspects biologically differentiate women from men: pregnancy and maternity. This subject already was addressed by the ILO in 1919, in Convention No. 3 concerning Maternity Protection (Landau & Beigbeder, 2008, p. 133).

Many women are subject to unequal treatment at work due to the realization of pregnancy and maternity leave. In order to ensure effective equality of treatment, the ILO law developed manners of protecting these rights among working women. Article 5(1) of the

Discrimination (Employment and Occupation) Convention No. 111 (1958) recognizes certain special measures of protection as non-discriminative. This provision opens the door for special measures applicable to women due to their biological conditions: pregnancy, birth-giving, and breastfeeding. In 2000, Maternity Protection Convention No. 183 and Maternity Protection Recommendation No. 191 were adopted, modifying former legal instruments.[22] They cover, in principle, all employed women. The Convention provides for a minimum maternity leave of 14 weeks. Cash benefits during this leave are to be no less than two-thirds of the woman's previous earnings. The Recommendation recommends that full amount of these earnings will be paid and specifies a range of medical benefits to be provided 'to the extent possible.' It is unlawful for an employer to terminate the employment of a woman during maternity leave or during the period following her return to work, except on grounds unrelated to the pregnancy, birth-giving and its consequences, or nursing. The Recommendation provides that the period of maternity leave should be taken into consideration as a period of service for the determination of her rights. The Convention requires the State Parties to adopt appropriate measures to ensure maternity does not constitute a source of discrimination in employment. In addition, Article 18 of the Maximum Weight Recommendation No. 128 (1967) limits the weight of manual transport that may be assigned to a pregnant worker. Article 11 of the Benzene Convention No. 136 (1971) prohibits pregnant women and nursing mothers from being employed in work processes that involve exposure to benzene or that contain it. Article 7 of the Night Work Convention (1990) provides for the offer of alternatives to night work before and after childbirth. The dismissal of women due to pregnancy or birth-giving is forbidden, and her income, retention of status, seniority, and access to promotion are protected (Landau & Beigbeder, 2008, pp. 134-138).

Workers with family responsibilities and child-care. The ILO Convention No. 156 on Workers with Family Responsibilities (1981) opened a new era of recognition with regard to sharing family responsibilities between men and women. Its Preamble declares its State Parties are aware a change in the traditional roles of men and women in society and in the family is needed to achieve full equality between men and women. It acknowledges the difficulties encountered by both men and women with family responsibilities with respect to "preparing for, entering, participating and advancing in economic activity" (Preamble and Article 1(1), ILO Convention No. 156). This Convention calls for the development of a supportive work-environment, which consists of public or private community services, such as child-care and family services, as well as the promotion of access to education and information. It provides that national policy should prevent discrimination (with reference to exercising the right to work) and, to the extent possible, prevent conflicts of interest between the exercise of this right and family responsibilities. Recommendation No. 165 concerning Equal Opportunities and Equal Treatment for Men and Women Workers: Workers with Family Responsibilities (1981) specifies in detail the measures that should be taken by State Parties to implement Convention No. 156, including the promotion of education and research, vocational guidance, counseling, information and placement services, child care and family services, social security benefits, tax relief, etc.

[22] The Maternity Protection Convention of 1919, mentioned before, was revised by Convention No. 103, which set the minimum maternity leave for a period of 12 weeks. It extended the scope of application of its provisions to women employed in industrial, in non-industrial and in agricultural occupations. Recommendation No. 95 (1952) provides for the extension of maternity leave to 14 weeks, where necessary for the health of the woman.

Part-time work and indirect discrimination. The ILO law indirectly protects women who work part-time because of family responsibilities, thus, forming a decisive percentage of all part-time workers.[23] This subject is covered by the Convention on Part-Time Work No. 175 and Recommendation No. 182 on Part-Time Work, both adopted in 1994. These legal instruments provide for the application of proportionate treatment in terms of proportional remuneration and other conditions of work, such as leave, bonuses, amenities, and privileges between full-time and part-time workers. This principle is meant to prevent discrimination of part-time workers in terms of relative remuneration and other working conditions when compared to full-time workers. This Convention did not gain a high rate of ratification.[24]

The dignity of the worker: Sexual harassment. Sexual abuse of workers is a severe difficulty encountered at work, not only by women but majorly by women. The ILO refers to the national level for concrete action while it regards its role as providing minimum standards, offering guidance and procedures, and encouraging governments to take action. It is, nevertheless, realized that changing norms of behavior in this sensitive area is a time-consuming effort involving all actors (i.e., governments, social partners, NGOs, and international organizations). To a great extent, this is subject to culture and education.

Positive or affirmative action. Although the ILO Conventions do not provide for affirmative action, surveys taken by the Committee of Experts in 1988 and 1996 recognized the importance of affirmative action during the first stages of the process of eliminating discrimination between men and women (provided for by Convention No. 111) (Landau & Beigbeder, 2008, p. 226).[25]

In addition to the Conventions and Recommendations, in 1998 the ILO adopted a Declaration on Fundamental Principles and Rights at Work, which also calls, *inter alia,* for the elimination of discrimination with respect to employment and occupation.

New dimensions were added to the subject matter on the ILO's agenda for the new millennium. The ILO developed a Decent Work Agenda, summing up the aspirations of people in their working lives involving opportunities for work that is productive, freely chosen, and delivers a fair income.

The OECD Instruments

The OECD developed only one instrument dealing with gender equality in 1980. It is a Declaration calling for its Member States to "adopt employment policies which offer men and women equal employment opportunities, independently of the rate of economic growth and conditions in the labour market" (OECD, 1980, paragraph A(i)). This is a definite phrasing, detaching gender equality from economic consequences. The Declaration calls for the adoption of non-discriminatory policies to deal with unemployment; the application of policies to reduce differentials in average earnings between women and men (while giving attention to special problems of minority women); encouragement of the development of more flexible time

[23] In the EU, women form 80% of all part time workers.

[24] Exceptions to this principle are maternity and injury, which are accorded full protection. In addition, the convention allows for exclusion of certain categories of workers from its provisions (Landau & Beigbeder, 2008, note 5, pp. 176-180).

[25] For the Norwegian experience on affirmative action provided for by law, see Sjåfjell & Reiersen (2008).

arrangements to provide for proportional pay to part-time workers; endeavors to ensure the provisions of taxation, social security, and child-support systems do not bias workers' choice of work place; stimulation of workers for further education and recreational training programs; protection of pregnant women's rights and the rights of women who gave birth; reviews of legislation to guarantee consistency with the equal opportunity in employment principle; education on gender equality; active use of measures directly available to governments, such as recruitment, training, and promotion in the public sector, employment creation programs and, in certain countries, regional development programs to enhance equal employment opportunities for women; and consideration of special problems related to migrant women. The Declaration stresses that the accomplishment of these goals necessitates the cooperation of employers and trade unions and the coordination of their efforts, as well as the cooperation of member states through the competent bodies of the OECD. This quite comprehensive declaration seems to include many of the elements still recognized by the OECD, as well as by the ILO, as decisive for the achievement of gender equality at work. However, despite the length of time since its publication in 1980, the goals set forth by the Declaration are still far from being achieved.

The OECD has resumed its interest in gender equality in recent years. In May 2011, the OECD Ministerial meeting decided to launch a new initiative to promote this goal. Thus, it now dedicates a reference to this subject on its internet site, titled "Gender Equality and Women's Empowerment" (OECD, 2011a). Some activities are performed via the Development Cooperation Directorate (DCD-DAC), which mainly concentrates on developing countries. The DAC Network on Gender Equality (GENDERNET) is the only international forum where experts from development co-operation agencies meet to define common approaches in support of gender equality. DAC members also contribute money for the enhancement of gender equality. During 2007-2009, DAC Members committed 23 billion dollars per year for this purpose. However, most of the money was dedicated to health, education, and governance aspects of gender equality; less aid was committed to gender equality in the economic and productive sectors (OECD, n.d.). In 1999, the DAC published the DAC Guidelines on Gender Equality. In 2008, following the review of these guidelines by OECD members, it was decided not to revise them but, rather, to publish new guidelines, resulting in the DAC Guiding Principles for Aid Effectiveness, Gender Equality, and Women's Empowerment, which are aimed at translating the principles determined by the Paris Declaration on Aid Effectiveness (OECD, 2005) into practice.[26] It was realized that "achieving these internationally agreed development goals will not be possible without progress on gender equality and women's empowerment" (OECD, 2008b, para. 4). It was further acknowledged that "gender inequalities are costly and undermine aid effectiveness and development impacts" (para. 4). This Declaration and the Accra Agenda for Action[27] provide both a framework and good practice principles for fostering gender equality as a priority development issue. These principles include the adoption of a harmonized approach (by

[26] *The Paris Declaration on Aid Effectiveness* (OECD, 2005, para. 2) sets out five principles for reform of aid, intended to "increase its impact in reducing poverty and inequality, increasing growth, building capacity and accelerating the achievement of the MDGs [Millennium Development Goals]" (OECD, 2008b, para. 4).

[27] This is an agenda set forth by the Ministers of developing and donor countries in 2008 in Accra, Ghana. It aims at deepening implementation of the Paris declaration. See the 3rd High Level Forum on Aid Effectiveness (OECD, 2008a).

donors' and partners' governments) toward gender equality: the implementation of concrete actions, focused on results and impact, as well as responsibility and accountability for those actions, and for agreed commitments on these issues. These approaches are to be used by policy advisors and program managers in both donor and partner countries.

A list of concrete actions titled "Investing in Women and Girls" lays out how to accelerate progress toward this goal by 2015, the deadline put forward by the UN. This list includes four key areas of action: ensuring women's access to financial assets,[28] ensuring girls' access to education, improving reproductive health and family planning, and supporting women's leadership. An OECD study published in 2010 found that poor progress with the achievement of the Millennium Goals was witnessed in countries where the social institutions discriminate against women. In these countries, women suffered from the low status of female-headed households, which implied, *inter alia,* the lack of sufficient access to financial resources, thus, affecting the malnourishment of their children and health conditions. In male-headed households, "the lack of women's decision-making power in the family and household limits their ability to make choices to safeguard the health, education and welfare of their children" (OECD, 2010b, p. 4). This, in turn, ensures the continuity of current biases among future generations. Early marriages among women affect the realization of education and, as a result, the economic potential both of these women and their children. The suffering of women from lack of personal security both at home and outside the home affects their rates of mortality as well as their psychological situation. The OECD, thus, criticized the Millennium Goals for missing these "critical variables," implying that if these variables are not addressed, the Millennium Goals may not be achieved.

An interim report published by the OECD in May 2011 introduced the education gaps between males and females of different ages, particularly in developing countries. It argues that "young women often do not translate their good school performance into fields of studies for higher education that offer better employment prospects" (OECD, 2011b, p. 2). It specifies that in OECD countries, new female entrants in the labor market have comparable and often higher education than their male counterparts. Nevertheless, "they are less likely to work for pay, more likely to be employed in lower-paid occupation and sectors, and more likely to have temporary employment contracts" (OECD, 2011b, p. 3) (The report specifies that the necessity to grow a family is one of the major obstacles for women's integration in labor markets, mentioning that this is the reason many women opt for part-time work. The report stresses the importance of supportive frameworks of day-care arrangements and after-school care, flexible working-time arrangements, and parental leave for fathers. The report further calls for improvement of women's access to assets and new technologies to improve their working skills. The report reiterates that women as entrepreneurs tend, more than men, to act through small and medium enterprises (hereby, SMEs), and to concentrate on different sectors than men. The report mentions financing difficulties encountered by women, suggesting this may be one of the reasons women do not develop larger businesses, like men. The report further acknowledges that Muslim women in the Middle East and in Asia are particularly prevented from access to financial resources, calling for this practice to change.

[28] It is stressed that 'Women typically invest a higher proportion of their earnings in their families and communities than men.'

At the end of the report, the OECD commits itself to gathering further information on the subject and developing policy recommendations to reduce these persistent barriers to gender equality.

Turning to another dimension of the same problem, in 2010 the OECD initiated the MENA [Middle East and North Africa]-OECD Conference on Gender Equality in Government and Business, in which representatives of the OECD, 14 MENA countries, and from other regional and international organizations took part to discuss strategies to overcome under-representation of women in decision-making bodies, such as political bodies, corporate boards, and management-level positions, and the difficulties faced by them in accessing government services and business support services (see OECD, 2010a; OECD, 2010c). In 2011, following this conference, a survey on National Gender Frameworks, Public Employment, Gender Public Policies, and Leadership in MENA countries was officially launched. Its results will feed into the upcoming Report on Gender, Law, and Public Policy: Trends in the Middle East and North Africa region. Another such conference took place in December 2011 in Spain, continuing the dialogue (OECD, 2011c). This is an example for the expansion of OECD policies, by cooperation, to non-Member States.

The World Bank's Instruments

In principle, the World Bank links gender with development, thus, focusing mainly on developing countries. The World Bank addresses this subject in the recently published 2012 World Development Report on Gender Equality and Development (2011c). This report illuminates an important aspect of the problem, which is also mentioned in the OECD report; although women encompass 40% of the total workforce and 43% of the total global workforce in agriculture, their impressive rate of participation does not indicate their roles and professional positions when compared to men's. The report reiterates that effective equality will be achieved as barriers to women's promotion are abolished. According to the report, wage gaps between men and women emanate, *inter alia,* from the following reasons:

> Women are more likely than men to work as unpaid family laborers or in the informal sector. Women farmers tend to farm smaller plots and less profitable crops than men. Women entrepreneurs operate in smaller firms and less profitable sectors. As a result, women everywhere tend to earn less than men. (World Bank, 2012a, p. 2)

According to this report, women form more than half the total population of students in the world. The problem is this is an average, which does not necessarily reflect the situation in each country. In Turkey, for example, girls are prevented, in many cases, from attending elementary school. However, even in the EU and Israel, where the rates of educated women seems to correspond with the description in this report, it does not seem to ensure equivalent rates of integration in the labor market.

Yet another report published recently by the World Bank (2012c) is Removing Barriers to Economic Inclusion 2012 – Measuring Gender Parity in 141 Economies. This report is measuring how regulations and institutions differentiate between women and men in different countries in ways that may affect women's incentives or capacity to work, or to set up and run a business. It

provides a basis for improving regulation. The report objectively examines six areas of domestic regulation: accessing institutions, using property, getting a job, providing incentives to work, building credit, and going to court. The report reflects a situation whereby developing economies have more regulative discriminatory obstacles toward women than high-income, OECD economies and those in Eastern Europe and Central Asia. However, the latter also suffer from regulatory biases. It further shows that "economies with higher levels of legal differentiation between men and women have, on average, lower female formal labor force participation – both in absolute terms and relative to men – and lower levels of women's entrepreneurship" (World Bank, 2012b, p. 2). The report further discusses regional differences on how to approach this subject and analyzes their effect. It estimates that changes in the right direction take place globally, although they are slow. In this respect, rhythm may be decisive.

The World Bank contributes indirectly to promoting gender equality by enhancing other Millennium goals, such as health, education, social safety nets, and human development. The Bank's social protection work spans social safety nets, social insurance, and labor programs that provide human development and economic opportunities, build resilience, and foster social inclusion and gender equality. The Bank is devoting considerable attention and resources to helping protect vulnerable populations, including women and girls, in times of crisis and volatility (World Bank, 2011b).

In 2007, the World Bank Group launched an action plan to improve women's economic opportunity. The four-year plan, Gender Equality as Smart Economics, invested in the improvement of women's access to jobs, land rights, financial services, agricultural inputs, and infrastructure. This Gender Action Plan (GAP) is interesting because it attracted 70 million dollars in support from Member States by 2010. The idea was to leverage a relatively small budget on an extensive operation, using the money for grants, loans, and awards accompanied by a strong matching fund by the Bank. All these financial resources were channeled toward the enhancement of gender equality in the Member States. In addition, awareness of gender equality affected the Bank's operations, heading toward gender mainstreaming. The link created between Bank activities and financial support on the one hand and gender equality on the other forms a positive incentive for countries wishing to enjoy the Bank's support to implement gender equality as a precondition for gaining this kind of help.

> This new way: (i) seeks to expand girls' and women's economic empowerment; (ii) incorporates gender issues into the "hard" sectors that had stubbornly resisted mainstreaming in the past; (iii) embeds gender analysis into core diagnostics; and (iv) invests in the development of a rigorous evidence base and pilot experiments to inform operations. (World Bank, 2011a, n.p.)

Based on the lessons gained, since 2011, the Bank has expanded the plan to include new fields of activity.

> [T]he transition plan shifts efforts towards working more closely with clients through regular Bank operations. It seeks to expand country counterparts' capacity to design, implement and monitor gender-sensitive policies and programs; to encourage more South-South dialogue and capacity building; to continue building data collection and

> strengthened country-specific gender analysis and diagnosis; and to better client demand for gender and development work. (World Bank, 2012d, p. V)

Section 2: Effectiveness of the Instruments Developed by International Organizations

The UN Instruments

Of all the UN instruments mentioned, only the Convention on the Elimination of all Forms of Discrimination against Women establishes legally binding, specific obligations that should be translated into domestic laws providing judicial remedies. The other instruments are more declarative, or provide for a review mechanism by the UN, which is not supported by possible sanctions. Even the UN review of implementation of the Convention on the Elimination of all Forms of Discrimination against Women is limited, lacking sanctions. Moreover, each of the Conventions is subject to ratification to become effective.

The ILO Instruments

Over the years, the ILO seems to have developed a comprehensive set of legal instruments to ensure women's rights in the labor market. Unfortunately, Member States may choose whether to ratify obligatory conventions, but as long as they do not ratify them, they are not bound by them. In addition, to a great extent, these instruments lack enforcement powers.

> While the ILO has no effective enforcement power, the effect of the ILO monitoring system rests on the cumulative impact of reviews of states' annual reports…The repeated public scrutiny…may exert a degree of political and moral pressure on governments. (Landau & Beigbeder, 2008, p. 20)

Even where a case is referred to the International Court of Justice and its decision is not followed by the complainant country, the final decision is made by a political forum. This characteristic potentially weakens implementation.

The OECD Instruments

Implementation of the OECD's only operative instrument also suffers from the same disadvantage: It is a Declaration, subject only to peer pressure. In addition, it provides for general goals, leaving the manners of their achievement totally to the discretion of the Member States. This instrument was established in 1980, and had it been followed fully, by now this article probably would have been unnecessary. The current situation described in OECD and World Bank reports reflects quite a different picture.

The World Bank's Instruments

While empirical reports and statistics by the World Bank, as well as the OECD, are important instruments that facilitate decision-making, they are not creating change on their own.

In this sense, the World Bank's policy of linking its services—financial support and consulting to the enhancement of gender equality by its beneficiaries—is a breakthrough. However, this instrument is valid for states that need such help (i.e., mainly developing countries). It is less effective for developed countries, which are positioned as donors to the Bank.

General Assessment

Many of the instruments developed by the different organizations provide for the same contents. To a certain extent, this phenomenon is justified due to the different memberships in each organization. However, the overlapping efforts could have been saved if organizations mutually had adopted instruments developed by other organizations. The efforts, thus spared, could have been geared toward moving forward.

Section 3: Can International Organizations Enhance Gender Equality at Work More Effectively?

In a way, the subject of gender inequality at work has been dealt with by international organizations since 1919, starting with the ILO. International organizations have since identified the main obstacles to achieving gender equality at work as being socially and culturally-based. In essence, these obstacles seem to be shared by developed and developing countries. International organizations engage in empirical surveys, describing the expression of these phenomena in different countries. These surveys reflect the obstacles encountered by women who already work in or wish to join the labor market. International organizations also have developed recommendations specifying pragmatic ways to overcome these obstacles. Comparisons between the ILO Conventions of the 1950s, the OECD Declaration of 1980, and more modern legal instruments do not show much of a change. This conclusion is unfortunate because it depicts a picture where "the dogs are barking but the caravan moves on."

Advocating gender equality not for fairness or social reasons, but rather for the economic benefit embodied in it, is a relatively new and challenging tendency embraced by international organizations. Where other reasoning seems to have failed, the current economic crisis is used as a leverage to convince states to strive for gender equality at work, if not for any other reason than for their economic benefit.

However, differences in reasoning alone will not do the job. A more determinant approach is necessary. It necessitates leadership and commitment in the global as well as national arenas. In the global arena, the World Bank's initiative of linking its financing and consulting services with gender equality requirements is a strategy that seems to create a positive motivation for countries that need the Bank's financing or professional advice to implement gender equality as a precondition for such help. This strategy may be taken one step further: For new Members, it may even be a pre-condition for membership in economic organizations. However, two complementary steps seem to be necessary to render the work of international organizations more effective: coordination and enforcement.

Enforcement

Enforcement instruments must be developed and applied both at the domestic and international levels. Many current legal instruments developed by international organizations to ensure gender equality at work call for development of domestic enforcement mechanisms. However, such instruments are not always developed—or when they are domestically developed, are not always implemented. One explanation for this phenomenon may be social and cultural pressures encountered by domestic leaders. Strong leadership is necessary to overcome these pressures.

To a certain extent, domestic leaders thus may rely comfortably on strong pressure assumed by international organizations and backed by a strong international enforcement mechanism. Such a mechanism was proved to be effective for the assimilation of international trade disciplines developed by the World Trade Organization, as its dispute settlement mechanism has strengthened considerably since 1995. International enforcement mechanisms that deal with gender equality exist, for example, in the EU and in the context of enforcing the European Charter on Human Rights and Fundamental Freedoms adopted by the Council of Europe and implemented by the International Court of Human Rights in Strasbourg. These mechanisms mostly serve developed countries. Even in developed countries that have access to these mechanisms, severe gender inequality still exists. One explanation may be that *a priori*, such mechanisms have only limited powers: They are limited by the existing law, by the parties that choose to approach the court, and by the cases brought before it. Individuals, particularly the oppressed, will not always find the time, money, knowledge, or courage to approach courts to defend their rights. In the case of states as parties to legal disputes, internal and external political considerations, as well as priorities, may discourage them from using these mechanisms. In addition, in light of the fact that in all the states examined by international organizations, such as the OECD and the World Bank, there is room for substantial improvement of applying gender equality in general, and at work in particular, states may abstain from filing complaints against one another to avoid counter-attacks.

Coordination

The work of international organizations until now is not wholly coordinated. Thus, there are many overlaps, as reflected by this review, as well as relevant topics that are not addressed by any organization. The introduction of a global coordination forum, including representatives of all states and international organizations, may create an umbrella entity that would allocate global efforts more efficiently. In addition, international enforcement mechanisms also may be coordinated to achieve global coverage as well as unified standards.

Economic Incentives

The shift in advocating gender equality at work based on general considerations of human rights and fundamental freedoms toward a view based on economic aspects, which has occurred in recent years, is important because it illuminates an aspect that was neglected in the past—the cost of inequality. According to the OECD, in 2007 it was estimated that "persistent gender

inequality and discrimination against women due to restrictions on access to employment and education alone cost between USD 58 and USD 77 billion per year in the Asia-Pacific region" (OECD, 2008b, footnote 6, note 35). These data may give the reader an indication as to the vast amount of economic global loss that occurs yearly. It seems these sums may not and should not be overlooked, particularly in times of global economic crisis such as has been experienced since 2008.

Yet another economic aspect refers to the World Bank's recent policy of linking gender equality to the entitlement of states to receive financial assistance from the Bank. Although the effect of this instrument is limited to states that need such help (i.e., mainly developing countries), the direction taken by the Bank seems to be innovative and, if followed by other economic organizations, its effect may expand substantially.

Coordination of Economic Incentives

If the basic approach of creating a global coordinating forum for the enhancement of gender equality is adopted, this forum may set a platform for economic incentives that would be beneficial for developed countries as well as developing ones. Such incentives may be complementary to a global enforcement mechanism. In addition, such a coordinating forum may develop short-term, globally agreed benchmarks to be accompanied by individual action-plans for each state involved, specifying how to achieve these benchmarks.[29] Such an action plan should be based on an individual economic analysis for each state, reflecting the economic profits that may accrue to that state from fully exploiting the domestic potential of gender equality at work. The coordinating forum then would initiate a follow-up review, to be accompanied by economic incentives for states that meet these benchmarks (e.g., improved access to export markets of services), and effective sanctions for those states that do not meet them.

An interesting initiative that may be expanded was launched in January 2011 at the Annual Meeting of the World Economic Forum in Davos, Switzerland, by the Gender Equality Project, a Swiss foundation. This initiative offers a global certification recognizing companies that have been successful in fostering equal opportunities for men and women. This assessment methodology identifies clear standards against which companies can measure their progress in five areas[30] that are fundamental to gender equality in the workplace. By applying the assessment methodology, companies put in place an effective framework to assess current outcomes and identify opportunities for additional actions that reinforce gender equality. International certification does not hold a direct economic benefit. However, it may imply an indirect economic benefit, taking into account that in many countries women are the driving force

[29] For that purpose, private sector entities seem to already have been developing tools. See, for example, a manual for self-assessment may be used. Such a *Gender Manual* was developed by Diakonia, a cooperation agency based in Sweden, and is assimilated through workshops (Diakonia, 2012). See also the *Global Gender Gap Index*, developed by the World Economic Forum, used for comparison and grading of countries and industries based on their approach to gender equality (World Economic Forum, 2010). At the domestic level, trade unions may be recruited to support collective arrangements (see Dickens, 2000).

[30] The five areas are equal pay for equivalent work, recruitment and promotion, training and mentoring, work-life balance, and company culture. For more details, see *Equal Pay for Equal Work* (Gender Equality Project, 2012).

behind most household purchases.[31] These women may prefer to acquire goods and services from companies that respect gender equality and, thus, may indirectly affect the relation between capital markets and investors with these businesses.

In contrast, a "black list" of companies and states that do not respect gender equality may be published by the coordinating entity, setting the basis for peer pressure to be placed on these companies and states. Such a strategy was applied successfully by the FATF with regard to money laundering (see FATF-GAFI, 2012).

It should be stressed that the different functions hereby described may be fulfilled by the current international economic organizations as they are, but if these organizations would become subject to a coordinating forum that can set common goals and benchmarks, and efficiently allocate global efforts among the organizations, results might improve.

Conclusion

Judging upon the written materials on the subject, gender equality seems to be a major issue on the global agenda. No doubt, it preoccupies international economic organizations, NGOs, governments, and private sector entities. There seems to be a rising tide of gender equality (see Inglehart & Norris, 2003). Moreover, while in the past, gender equality was mainly advocated for constitutional and human rights' reasons, its economic potential now is recognized. However, despite the large scale of writing and activities already taking place, the empirical situation is still far from its goal. To make a substantial change, the coordination of the various initiatives, and the development of a common strategy seems to be necessary. Such a move requires strong leadership, but is inevitable for the utilization of that important economic resource to provide a global benefit.

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Discussion Questions

1. Would the establishment of an umbrella organization to enhance the global participation of women in labor markets render international contribution more effective?

2. What is the due balance of responsibilities for the enhancement of this goal between countries and international organizations?

3. To what extent should international organizations interfere in domestic affairs in the name of such a global economic interest?

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"Dragon head"

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Transformational Leadership and Organizational Commitment: A Cross-Cultural Perspective

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Abstract

This study explores the relationship between transformational leader behavior and employee commitment to the organization. The respondents for this study include 474 professional employees from a large multi-national, high-tech corporation in the United States (US) (n = 332) and Israel (n = 142). Data were collected using Kouzes & Posner's (1997) Leadership Practices Inventory and Meyer & Allen's (1991) three-dimensional Organizational Commitment scale. The results provide evidence that supports the relationship between leader behavior and employees' commitment to the organization in the US and Israel, contributes to the growing body of literature on leadership practices and organizational commitment, and strengthens the existing knowledge on the effectiveness of US-based leadership practices in other countries.

Keywords

transformational leadership, organizational commitment, leadership practices, effectiveness, cross-cultural, Israel, United States

Introduction

The concept of organizational commitment has received a great deal of attention in the literature in recent years. Researchers and practitioners have an ongoing interest in organizational commitment because of its relationship to important outcomes, including job performance, discretionary effort, acceptance of organizational change, organizational citizenship behavior, turnover intentions, and voluntary employee turnover (Fischer & Mansell, 2009; Herscovitch & Meyer, 2002; Keller, 1997; Schappe, 1998; Vandenberghe & Bentein, 2009).

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The Corporate Leadership Council (2009) recently reported a decrease in employee commitment in organizations around the world by as much as 10% since 2005. The decrease in employee commitment places additional stress on organizations as they wrestle with the broad implications of economic and organizational uncertainty. Given the importance of employee commitment to organizational success, researchers have sought to identify and understand the specific aspects of the work environment that influence organizational commitment.

A number of researchers have examined the relationship between leader behavior and organizational commitment; the relationship has been fairly well established. Mathieu and Zajac (1990), in their meta-analysis of the organizational commitment literature, find that leader communication, participative leadership behaviors, and leader consideration behaviors correlate positively with commitment ($r = .45$, $r = .39$, and $r = .33$, respectively). Research has continued over the last 20 years with a variety of populations, building the case for a significant and important relationship between leader behavior and organizational commitment.

There has been an increased focus on the positive relationship between transformational leadership and organizational commitment (Dale & Fox, 2008; Dvir, Kass, & Shamir, 2004; McCann, 2011). When using transformational leadership behavior, leaders articulate a shared vision, set high expectations, intellectually stimulate subordinates, recognize individual differences, and demonstrate consideration and support (Bass, 1990). Transformational leadership has been found to have significant and positive relationships with organizational commitment in the United States (US) (Bycio, Hackett, & Allen, 1995; Emery & Barker, 2007). Studies outside the US also have found transformational leadership to have a significant and positive relationship to organizational commitment with an increasing number and variety of populations, including staff nurses in Singapore (Avolio, Weichun, Koh, & Bhatia, 2004), R&D professionals in Singapore (Lee, 2005), employees in small family-owned businesses in Germany (Bernard & O'Driscoll, 2011), salespeople in Greece (Panagopoulos & Dimitriadis, 2009), and tellers and clerks in banks in Kenya (Walumbwa, Orwa, Wang, & Lawler, 2005).

The number of cross-cultural studies on the relationship between transformational leader behavior and organizational commitment is growing but still limited. Cross-cultural studies provide important insight as an ever-increasing number of corporations operate in multiple countries. The Global Leadership and Organizational Behavior Effectiveness Research Program looked at leadership in 62 cultures and found that attributes associated with transformational leadership are endorsed universally across cultures as contributing to outstanding leadership (Den Hartog, House, Hanges, Ruiz-Quintanilla, Dorfman, & GLOBE Associates, 1999).

Though there are arguments in the cross-cultural leadership literature for the universal effectiveness of transformational leadership (Bass, 1997; Den Hartog et al., 1999), other researchers have found the outcomes associated with specific leadership practices can be different across countries. Data collected by researchers in Belgium, Finland, and the Philippines, for example, suggest that, at least among US multinationals, commitment level differences across countries can be explained in part by differences in employee reactions to US-based management initiatives (Kirkman & Shapiro, 2001). Lok and Crawford's (2004) study in Hong Kong and Australia further demonstrates that national culture can produce significant moderating effects on the relationship between leader behavior and organizational commitment. Mannheim and Halamish (2008) conducted a study of transformational leadership and its effect on group outcomes among army training units in Israel. The study raises questions regarding the

universality of context in the relationship between leadership styles and group outcomes. They recommend that future studies examine which aspects of group context characteristics promote the influence of leadership style and that researchers look at different units of business and industrial organizations where task characteristics may differ.

We are unaware of any study that has examined the relationship between transformational leadership behavior and organizational commitment within multinationals in Israel. Given a rich pool of engineering talent, many large multinationals have established a presence in Israel, tapping engineers, programmers, and marketing professionals. Google, for example, has opened two Research and Development Centers (R&D) in Israel in the past four years. Cisco, IBM, and Microsoft also have R&D facilities in Israel (Shamah, 2008).

It is common practice for large, US-based multinationals to design a leadership model with defined leadership behaviors at the corporate level and cascade it globally. Leadership development programs and performance management systems then are aligned to reinforce their models. For organizations that depend on the success of their operations around the world, understanding the effectiveness of US-based leadership practices in other countries is important.

Building on previous research on transformational leadership and organizational commitment, we sought to examine the influence of transformational leader behavior on the organizational commitment of research and development employees in the US and Israel. There is practical value in connecting a specific leadership model with growing insight on how organizations can inspire organizational commitment through their dominant leadership styles. Such a model provides guidance for aspiring leaders and enables organizations to make informed decisions about the effectiveness of their espoused leadership style. This insight enables the design of leadership development strategies based on principles emphasizing the desired leader behaviors. Kouzes and Posner's Leadership Practices Model has received endorsements from studies outside the US and offers promise as a cross-cultural transformational leadership model (Abu-Teneh et al., 2009).

Leadership Practices Model

Kouzes and Posner (2007) developed their leadership model from an analysis of more than 1,000 personal-best cases. They then developed a quantitative instrument—The Leadership Practices Inventory—to measure the leadership behaviors they identified. From a research database of more than 10,000 leaders and 50,000 constituents, they distilled 5 fundamental practices of exemplary leaders: inspiring a shared vision, challenging the process, enabling others to act, modeling the way, and encouraging the heart (Kouzes & Posner, 2007).

Inspiring a shared vision is the extent to which leaders create a compelling image of what the future can be like. They speak with genuine conviction about the higher meaning and purpose of the work. They appeal to others to share an exciting dream of the future, and show others how long-term interests can be realized by enlisting a common vision. Challenging the process is the extent to which leaders search for opportunities to change the status quo. These leaders challenge people to try out new and innovative ways to do their work. They look for creative ways to improve the organization, experiment, take risks, and accept inevitable disappointments as learning opportunities (Kouzes & Posner, 2007).

Enabling others to act is the extent to which leaders empower people, giving them freedom in deciding how to do their work. They support the decisions that people make on their own. When enabling others, leaders actively involve others, develop cooperative relationships, and understand that mutual respect is what sustains extraordinary efforts. Modeling the way is the extent to which leaders set a personal example of what they expect from others. When modeling the way, leaders build consensus around a common set of values for running the organization. They follow through on commitments and ask for feedback on how their actions affect other people's performance. Encouraging the heart is the extent to which leaders recognize the contributions and celebrate the accomplishments of their people. When encouraging the heart, leaders demonstrate genuine acts of caring. They provide appreciation and support for their people, and express confidence in people's abilities (Kouzes & Posner, 2007).

Organizational Commitment

Meyer and Allen (1991) developed a three-component model of organizational commitment that we used for this study. Their model, and the measures associated with it, have undergone extensive empirical evaluation. They define organizational commitment as a three-dimensional construct characterizing an employee's relationship with an organization. The three dimensions are affective, continuance, and normative commitment.

Affective commitment refers to the employee's emotional attachment to, identification with, and involvement in a particular organization. Employees with a strong affective commitment continue employment with an organization because they *want* to do so. Continuance commitment refers to an awareness of the costs associated with leaving an organization. Employees whose primary link to the organization is based on continuance commitment remain because they *need* to do so. Normative commitment reflects a feeling of obligation to continue employment. Employees with a high level of normative commitment feel that they *ought* to remain with the organization.

This study seeks to extend previous research studies by exploring the relationship between employees' perception of their leaders' behavior, as defined by a well-established leadership model, and the employees' organizational commitment, as defined by a multi-dimensional model of commitment. We expect that employees working under leaders that exhibit transformational leadership behaviors, as measured by the Leadership Practices Model, will report higher levels of organizational commitment. Thus, the following hypotheses are proposed:

H1: There is a significant relationship between transformational leader behavior and employee affective organizational commitment.

H2: There is a significant relationship between transformational leader behavior and employee continuance organizational commitment.

H3: There is a significant relationship between transformational leader behavior and employee normative organizational commitment.

Cross Cultural Application

As the long-term success of many firms relies increasingly on their ability to operate effectively in different countries, there is also an increased need for research on employee populations outside the US. Conducting studies both inside and outside the US contributes to the growing body of research on the influence of national culture on the perception and effects of leader behavior, and strengthens existing knowledge on the effectiveness of US-based leadership practices in other countries.

Geert Hofstede's (2005) Value Survey Module, one of the most popular measures of cultural values, provides a theoretical framework to guide cross-cultural comparisons, and to help researchers and practitioners understand how people in various countries perceive and interpret their worlds. For this study, Hofstede's model provides a framework to help interpret why the influence of leader behavior on organizational commitment might vary across cultures.

The Individualism dimension of Hofstede's model describes the degree to which individuals are integrated into groups. In an individualistic culture, people are expected to look out for themselves and their immediate family. This differs from collectivism, which describes cultures with strong ties between people. In collective cultures, individuals are members of close groups that offer protection to their members and demand loyalty in exchange. In collectivist cultures, harmony should be maintained and confrontations are avoided. The high individualism ranking for the United States (rank = 91) indicates a culture with a more individualistic attitude and relatively loose bonds between individuals. From an organizational perspective, there tends to be a greater focus on work goals that stress individual, rather than group achievement. This differs from the lower individualism ranking for Israel, which ranks 54 and indicates a culture in which, from a young age, people often are integrated into strong, cohesive groups that protect them in exchange for loyalty (Hofstede, 2005).

The leader behaviors associated with Enabling Others to Act in the Kouzes and Posner (2007) model are closely aligned with the cultural dimension of Individualism/Collectivism. Leaders who Enable Others to Act support the decisions people make on their own. Given the highly individualistic national culture of the US, we anticipated US employees would be more attracted than would Israeli employees to leaders who empower people to engage in independent thinking, and give them a great deal of freedom and choice in deciding how to do their work.

The Power Distance dimension refers to the distribution of power. The Israeli culture scored quite low on this dimension (only one country/region scored lower). The lower ranking for Israel (rank = 13) indicates greater equality and cooperative interaction among various organizational levels. The United States has a rank of 40. This is an indication that managers and employees may typically be considered more equal in status in Israel than in the US (Hofstede, 2005). The leader behaviors associated with Modeling the Way may be aligned with the cultural dimension of Power Distance. Leaders who Model the Way create a sense of equality by inviting their staff to provide them with feedback on how their actions affect others. They ensure everyone has a voice in decision-making and work with their teams to build consensus around a common set of values for running the organization. Given the low ranking in Power Distance for Israel, we anticipated Israeli employees would be more attracted to leaders who display these transformational leadership behaviors than would US employees.

Uncertainty Avoidance is "defined as the extent to which the members of a culture feel threatened by uncertain or unknown situations" (Hofstede, 2005, p. 113). Lower scores are an indication of weak levels of uncertainty avoidance, and higher scores are an indication of strong levels of uncertainty avoidance. In weak uncertainty avoidance cultures, deviant and innovative ideas and behavior are tolerated. In strong uncertainty avoidance cultures, there is an "emotional need for rules" (p. 125). The lower uncertainty avoidance ranking for the US (rank = 46) is indicative of a society that has fewer rules than some others, and does not attempt to control as many outcomes and results. This differs from the higher uncertainty avoidance ranking for Israel, which ranks 81, indicating a lower level of tolerance for a variety of ideas, thoughts, and beliefs. Thus, Israel is considered a strong uncertainty avoidance culture, while the US is considered a moderate uncertainty avoidance culture (Hofstede, 2005). The leader behaviors associated with Challenging the Process are closely aligned with the cultural dimension of uncertainty avoidance. Leaders who challenge the process search outside the formal boundaries of the organization for innovative ways to change the status quo and improve the organization. They experiment and take risks, even when there is a chance of failure. Given Israeli national culture is quite high on uncertainty avoidance, we anticipated Israeli employees might be less attracted to leaders who introduce innovative approaches and create unstructured, novel, or unfamiliar situations.

The difference between the US (rank = 62) and Israel (rank = 47) is smallest on the Masculinity-Femininity dimension. A higher ranking indicates a more masculine culture, which values assertiveness, competition, and the acquisition of material goods over modesty and nurturing relationships. Even with the small absolute differences in scores, Israel is considered a moderately feminine culture, while the US is considered a moderately masculine culture (Hofstede, 2005). The leader behaviors associated with Encouraging the Heart are closely aligned with a feminine culture as defined by Hofstede. The differences between the US and Israel are quite small on the masculinity/femininity dimension. However, it is possible Israeli employees, who live and work in a culture classified as moderately feminine, would better appreciate leaders who exhibit behaviors that demonstrate genuine acts of caring, and who recognize the contributions and accomplishments of their people.

With the differences in the cultural dimensions between the US and Israel, particularly individualism, uncertainty avoidance, and power distance, we anticipated findings that would reveal potentially significant differences in the impact of specific transformational leadership behaviors on organizational commitment between the two countries. Thus, the following hypothesis was proposed:

H4: The relationship between transformational leader behavior and employee organizational commitment differs between US and Israeli employees.

Methodology

Subjects

The population for this study consists of research and development (R&D) employees in a high technology multinational corporation, headquartered in the United States. A total of 750 employees were surveyed in the US and 400 in Israel. Respondents were primarily engineers

(79%), the remaining being primarily marketing professionals. Completed surveys were returned by 332 US employees (response rate = 44%) and 142 Israeli employees (response rate = 36%). On average, respondents reported they had been working for their current employer for approximately eight years.

Measures

Leader Behavior. Leader behavior, the specific behaviors leaders use in leading others, was measured using the Leadership Practices Inventory: Observer (LPIO), published by Kouzes and Posner in 1997. The LPIO consists of 30 descriptive statements about leader behaviors. The response format for the LPIO in our study uses a seven-point scale ranging from strongly disagree (1) to strongly agree (7). Six items measure each of the five components of leader behavior (challenging the process, inspiring a shared vision, enabling others to act, modeling the way, and encouraging the heart). Previous research reports internal reliabilities ranging from .81 to .91 for each of the five leader behavior measures (Kouzes & Posner, 2007).

Organizational Commitment. Organizational commitment is the relative strength of an individual's identification with and involvement in a particular organization. Current organizational commitment was measured using the three-dimensional Organizational Commitment scale published by Meyer and Allen in 1997. The Organizational Commitment scale consists of 18 items measured on a seven-point scale ranging from strongly disagree (1) to strongly agree (7). Six items measure each of the three components of organizational commitment (affective, continuance, and normative). Previous research reports an acceptable range of internal reliability coefficients for affective (alpha = .85), continuance (alpha = .79), and normative (alpha = .73) commitment (Meyer & Allen, 1997).

Procedures

An e-mail message explaining the nature and purpose of the research study, along with a link to the survey, was sent to all participants. The e-mail was signed by the directors of the business unit. It indicated the relevance of the study, provided directions for completing the survey, and assured participants of confidentiality.

Results

Descriptive statistics for the study variables are shown in Table 1. A t-test of two means was conducted to determine if there were any differences in employee perceptions of leader behavior between the two countries. No significant differences were found between US and Israeli employees' perceptions of their leaders' behaviors (see Table 2).

Table 1
Descriptive Statistics: Combined US and Israel Samples

Variable	Mean	Standard Deviation
Affective Commitment	4.62	1.90
Continuance Commitment	3.42	1.17
Normative Commitment	3.95	1.24
Challenging the Process	4.82	1.14
Inspiring Shared Vision	4.50	1.26
Enabling Others to Act	5.26	1.18
Modeling the Way	5.05	1.15
Encouraging the Heart	4.83	1.27

N=274.

Table 2
Leader Behavior by Country: t-test of Two Means

Leader Behavior	US mean	US s.d.	Israel mean	Israel s.d.	t value+
Challenging the Process	4.87	1.13	4.73	1.14	1.23
Inspiring Shared Vision	4.45	1.25	4.64	1.25	-1.52
Enabling Others to Act	5.33	1.18	5.12	1.18	1.77
Modeling the Way	5.06	1.09	5.04	1.09	0.18
Encouraging the Heart	4.90	1.23	4.70	1.23	1.62

Sample size US = 332; Israel = 142; +all t-values returned a $p > 0.05$

Hypothesis one proposed that there would be a significant relationship between transformational leader behavior and employee affective commitment. In order to test this hypothesis, we calculated the correlation between affective commitment and all five components of the Leadership Practices Inventory for a combined US and Israeli sample (n = 474). The results indicate a significant positive correlation between affective commitment and each of the five leader behavior components for the combined US and Israeli sample (see Table 3). Therefore, hypothesis one is supported.

Table 3
Intercorrelations: Leadership Practices and Organizational Commitment

	Affective Commitment	Continuance Commitment	Normative Commitment
Challenging the Process	.30**	-.02	.27**
Inspiring Shared Vision	.34**	.09	.33**
Enabling Others to Act	.23**	-.03	.25**
Modeling the Way	.31**	-.01	.28**
Encouraging the Heart	.28**	.01	.24**

N=474; **P less than or equal to 0.01.

Hypothesis two proposed that there would be a significant relationship between transformational leader behavior and employee continuance commitment. In order to test this hypothesis, we calculated the correlation between continuance commitment and all five components of the Leadership Practices Inventory for a combined US and Israeli sample ($n = 474$). The results indicate no relationship between continuance commitment and any of the five leader behavior components for the combined US and Israeli sample (see Table 3). Therefore, hypothesis two is not supported.

Hypothesis three proposed that there would be a significant relationship between transformational leader behavior and employee normative commitment. In order to test this hypothesis, we calculated the correlation between normative commitment and all five components of the Leadership Practices Inventory for a combined US and Israeli sample ($n = 474$). The results indicate a significant positive correlation between normative commitment and each of the five leader behavior components for the combined US and Israeli sample (see Table 3). Therefore, hypothesis three is supported.

Hypothesis four proposed that the relationship between transformational leader behavior and employee organizational commitment would differ between US and Israeli employees. In order to test this hypothesis, we calculated the correlation between all three measures of organizational commitment and all five components of the Leadership Practices Inventory (see Table 4) separately for the US ($n = 332$) and Israeli ($n = 142$) samples. The results indicate only one differing relationship. When testing the US sample alone, the results indicate a significant positive relationship between continuance commitment ($r = .12$; $p < 0.05$) and the leader behavior of Inspiring Shared Vision for the US sample. No other differences were found between the two samples. Therefore, hypothesis four is not supported.

Table 4
Intercorrelations by Country: Leadership Practices and Organizational Commitment

	Affective Commitment	Continuance Commitment	Normative Commitment
Challenging the Process			
United States	.34**	.01	.30**
Israel	.29**	-.03	.26**
Inspiring Shared Vision			
United States	.35**	.12*	.35**
Israel	.31**	.01	.27**
Enabling Others to Act			
United States	.34**	.01	.30**
Israel	.29**	-.03	.26**
Modeling the Way			
United States	.32**	.02	.30**
Israel	.33**	-.06	.27**
Encouraging the Heart			
United States	.35**	.04	.28**
Israel	.24**	-.02	.22**

US n = 332; Israel n = 142
*P less than or equal to 0.05; **P less than or equal to 0.01.

Discussion

This study links an established model of transformational leadership (Kouzes & Posner's Leadership Practices Model) to an established model of organizational commitment (Meyer & Allen's 3-Component Model). The study demonstrates that transformational leadership behavior, as defined by this model, is significantly and positively related to two of the three components of organizational commitment in both the US and Israel.

The findings of this study showed a consistently positive relationship between all five transformational leadership practices and both affective and normative commitment for all respondents, US and Israeli alike. Each of the five leadership practices, therefore, was found to be related to employees' desire to stay with the company and feelings they have an obligation to stay. Given reported decreases in employee commitment worldwide over the last several years (Corporate Leadership Council, 2009), the link between leader behavior and organizational commitment is especially promising. With the use of an established leadership model and existing support materials, the leadership behaviors under study may be taught to managerial and supervisory level employees via training and development programs. Leadership training and feedback has been shown to result in increased subordinate perceptions of leaders' transformational leadership. Results suggest that both training and feedback are effective means of changing leadership behaviors (Kelloway et al., 2000).

Tseng (2011) suggests that learning strategies and empowerment can influence employee commitment in a positive way. Likewise, managers and other supervisory personnel who are

trained in the behaviors of inspiring a shared vision and encouraging the heart may very well find the employees reporting to them have increased levels of affective and normative commitment. These insights should be useful to organizations concerned with developing strategies to increase employee commitment and organizational effectiveness. While correlation does not imply causation, managerial and supervisory training programs are commonplace in large corporations; ensuring that established programs include the leader behaviors studied here is worthy of consideration.

Transformational leadership behavior was not found to be related to continuance commitment. While a correlation was found between inspiring a shared vision and continuance commitment in the US, it was a low order correlation, indicating a weak relationship between the two variables for this one group. It may be that corporations who hire or train leaders to inspire a shared vision also provide leading edge benefits packages. While an interesting notion, this is outside the scope of our current research. The possible reasoning behind this one relationship may warrant additional study. We have concluded, however, that the leadership practices measured here were not significantly tied to employees' sense of needing to stay with the organization for either sample. This makes sense because the need to remain with a particular organization is tied to individual employee circumstances, like financial obligations or limited opportunities for alternate employment. This need is unlikely to be swayed by either effective or ineffective leadership practices.

The results also indicate that the relationship between leader behavior and employee commitment did not differ based on the nation of employment. This finding was a surprise. We proposed that the leader behaviors associated with encouraging the heart are matched closely with a feminine culture as defined by Hofstede. As such, we expected that Israeli employees, who live and work in a culture that is classified as moderately feminine, would better appreciate leaders who exhibit behaviors that demonstrate genuine acts of caring and who recognize the contributions and celebrate the accomplishments of their people. However, this was not the case. Perhaps the differences between the two cultures are not sufficient on the masculinity/femininity dimension to test this. Future research may wish to test two extreme cultures on this dimension to determine if the leader practices of encouraging the heart can be better linked to national culture.

Given the contrasts between the national cultures of Israel and the US, one might have expected to find that individuals living in these cultures would react differently to the same leader behaviors. We proposed that the leader behaviors associated with Enabling Others to Act in the Kouzes and Posner model would be closely aligned with the cultural dimension of Individualism/Collectivism. Given the highly individualistic national culture for the US, we anticipated that US employees would be more attracted than Israeli employees to leaders who display these transformational leadership behaviors. Similarly, we proposed that the leader behaviors associated with Modeling the Way would be aligned with the cultural dimension of Power Distance. Given the low ranking on Power Distance for Israel, we anticipated that Israeli employees would be more attracted than US employees to leaders who display these transformational leadership behaviors. We also proposed that the leader behaviors associated with Challenging the Process would be tied to the cultural dimension of uncertainty avoidance. Given the Israeli national culture is quite high on uncertainty avoidance, we expected that employees in this culture would be less attracted to leaders who displayed behaviors tied to

challenging the process. Our findings did not support any of these proposals. It could be that challenging the process is not an uncommon trait in Israel. Israelis are taught to challenge everything, be curious, and ask questions (Senor & Singer, 2009, as cited in Gringarten, 2010). This certainly suggests a national culture that is rather low on uncertainty avoidance and implies a notion of challenging the process being inherent in Israelis.

Another possible explanation for these findings of no differences between the samples is that all individuals in this study were employed by a single US-based firm and performing similar tasks. The organizational culture of the firm may be such that employees, no matter their national culture, are socialized to accept and appreciate leaders who inspire a shared vision, encourage the heart, challenge the process, model the way, and enable others to act. As such, this is a potential limitation. A second limitation may be that the responses of the Israeli participants were influenced by the fact that they work for a US-based corporation and may not be representative of Israeli employees working for non-US based corporations.

These limitations notwithstanding, the results explored here make a positive contribution to the cross-cultural leadership literature. We are aware of no other study that has examined the effect of these transformational leadership behaviors on employee commitment among Israeli employees in a US-based multinational. Nor are we aware of any other study that has examined the effect of these transformational leadership behaviors on employee commitment among US and Israeli R&D professionals. The findings contribute to the literature by providing preliminary evidence that use of these transformational leadership practices can be equally effective, in terms of their link to organizational commitment, in both the US and Israel. The study also contributes to the growing body of literature on leadership practices and organizational commitment, and adds to the cross-cultural research stream related to doing business around the world. Other researchers are encouraged to extend this work to include countries whose cultures differ more markedly from that in the US.

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Discussion Questions

1. Based on the findings of this study, what recommendations would you have for a United States-based leader being sent to Israel for a two-year expatriate assignment?

2. What recommendations would you have for corporate executives who are responsible for leadership development in their organizations?

3. What further studies would be valuable to build on this research?

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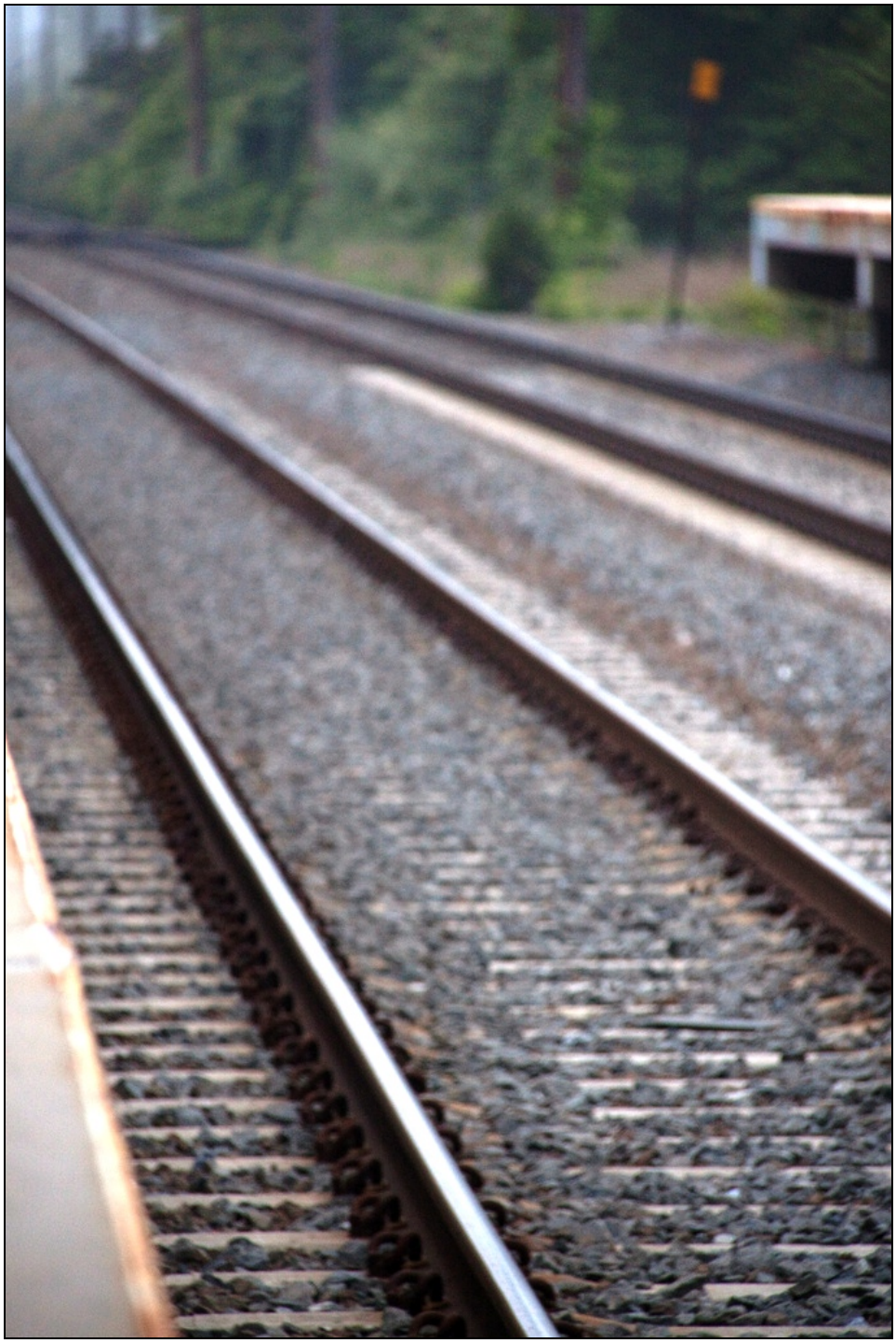

"Railroad tracks"

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Evaluation of a Computer-Supported Collaborative Learning Tool: Effects on Quiz Performance, Content-Conceptualization, Affect, and Motivation

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Abstract

The current study tested the effectiveness of a computer-supported collaborative learning tool—HyLighter—on undergraduate students' learning, affect for learning, and complex cognitive skills. The HyLighter group (N=23) (1) digitally highlighted and annotated a reading article, and (2) reviewed and expanded on peers' and instructor's highlights and annotations. The control group (N=27) read the article in hard copy without using HyLighter and practicing its learning activities. The dependent variables included: (a) performance on a reading quiz, (b) a number of affective variables related to the reading assignment, and (3) students' cognitive modeling of the article's content. Although students reported high rates of satisfaction with the HyLighter tool, performance on the reading comprehension quiz did not differ significantly between the two groups. Students using HyLighter tended to score higher on both the positive-valence and negative-valence emotions. However, these students also showed significant and substantial superiority in mental model similarity indices. Thus, HyLigher use in the learning process was apparent in the learners' content-conceptualization more so than in quiz performances. These findings have significant implications for both instructional and research purposes.

Keywords

social annotation, distance education, computer-supported collaborative learning, complex thinking skills, HIMATT, HyLigther, text summaries, reference models

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Introduction

Collaborative learning is characterized by groups of learners actively communicating and interacting with each other to set up a shared focus aimed at reaching a common goal (Akkerman et al., 2007; Beers, Boshuizen, Kirschner, & Gijselaers, 2006). In fact, "the widespread and increasing use of collaborative learning has been a success story" (Johnson & Johnson, 2009, p. 365). Amongst most important characteristics of collaborative learning are the following: (1) *positive mutual dependence* where the learners depend on each other to complete a shared task, (2) *individual accountability* where each learner in the group shares responsibility for the end result, and (3) *social skills* where the members develop social skills to work together successfully (see van der Meijden, 2007). The success of collaborative learning can be attributed to its allowing increased active engagement in the learning process and longer retention of the learned material (Morgan, Whorton, & Gunsalus, 2000), improving students' complex thinking skills (Sloffer, Dueber, & Duffy, 1999), and overall enabling more self-regulation in students (Van Boxtel, Van der Linden, & Kanselaar, 2000). Several concepts inherent in different disciplines can help at least partially explain why students, given the right circumstances, learn more optimally from actively communicating with one another.

According to classical cognitive developmental perspective, collaborative learning works efficiently because it promotes learning within a zone of proximal development (see Vygotsky, 1978). Hence, the scaffolding of the learning material by the more capable learner transfers to the less capable learner. Moreover, collaborative learning works because it supports the development of new cognitive schemas (Fawcett & Garton, 2005); hence, more advanced representations are formed and implemented by the learner. Finally, collaborative learning works because it creates social cohesion resulting in group members' desire to help each other in the learning task (see Janssen, Kirschner, Erkens, Kirschner, & Paas, 2010). This said, collaborative learning environments may differ in size, group characteristics, learning focus, learning goals, and supportive technologies (Kirschner, Paas, & Kirschner, 2009).

Within technologically supported learning environments, computer-supported collaborative learning draws ample research (Gress, Fior, Hadwin, & Winne, 2008). As for its origins, computer-supported collaborative learning takes root in the expansion of the computer-supported cooperative work (Wang, 2009). Within the computer-supported collaborative learning platforms, Web-based collaborative learning systems draw learners to participate in collaborative learning activities (Jones, Blackey, Fitzgibbon, & Chew, 2010). Consequently, the overarching realm of the research into the computer-supported collaborative learning includes designing software tools and creating collaborative learning environments to promote social construction of the knowledge (Hadwin, Gress, & Page, 2006). Computer-supported collaborative learning combines collaborative learning and the use of information and communication technologies resulting in a number of educational, social, and motivational gains (see Jansen, Erkens, & Kanselaar, 2007). Comparative accounts of computer-supported collaborative learning and face to face learning environments reveal for instance that students within computer-supported collaborative learning environments (1) report larger learning gains (Hertz-Lazarowitz & Bar-Natan, 2002); (2) deliver more complete assignments, make higher quality decisions, and perform more optimally on tasks that require brainstorming (Fjermestad, 2004); (3) engage in more complex and challenging discussions (Benbunan-Fich, Hiltz, & Turoff,

2003), with more equal participation of group members (Fjermestad, 2004); and finally, (4) report higher levels of satisfaction (Fjermestad, 2004).

This said, not all computer-supported collaborative learning settings are effective (Dewiyanti, Brand-Gruwel, & Jochems, 2005). Participants in computer-supported collaborative learning settings often encounter interaction, or communication problems, or both (Janssen, Erkens, Jaspers, & Broeken, 2005). Specifically, within computer-supported collaborative learning platforms, participants may perceive group discussions as perplexing (Thompson & Coovert, 2003), need more time to arrive at a consensus (Fjermestad, 2004), and take longer to solve problems (Baltes, Dickson, Sherman, Bauer, & LaGanke, 2002). The effectiveness of these platforms could also be hindered because group members in computer-supported collaborative learning settings seldom recognize the task as a group task (i.e., perform individually and not collaboratively) (Carroll, Neale, Isenhour, Rosson, & McCrickard, 2003). A probable explanation for these difficulties can also be attributed to the fact that most computer-supported collaborative learning environments focus primarily on the support of cognitive processes, whereas social processes including positive affective relationships, group cohesiveness, trust, and a sense of community are most needed for a group to reach their full potential (Kreijns & Kirschner, 2004). In fact, given that these processes do not automatically develop by merely gathering learners together (Fischer, Bruhn, Gräsel, & Mandl, 2002), researchers suggest that for obtaining optimal effects, computer-supported collaborative learning settings should provide an environment that develops and promotes social processes as well as the cognitive ones (Kreijns, Kirschner, & Jochems, 2003).

To promote the social processes within a computer-supported collaborative learning environment, a social annotation model-learning system may prove ideal. The social annotation model-learning system (SAM-LS) is a technology-enhanced shared annotation tool that improves social collaboration on electronic documents where multiple writers can proofread, and provide corrective feedback and reviews (Lebow, Lick, & Hartman, 2009). Social annotation model-learning system further supports social processes by merging touches of Web 2.0 social networking tools (i.e., Facebook, MySpace, Ning) with more basic annotation practices including the reviewing features inherent in Microsoft Word, or Adobe Acrobat, or both (Mendenhall & Johnson, 2010).

Preliminary findings associated with the use of the social annotation model-learning system in a community college identified the following: (1) improved participation, engagement, accountability, and completion rates for assignments; (2) enhanced active reading skills, and learning from text; and (3) better writing skills for the students who used the program (Lebow, Lick, & Hartman, 2004). Additional pilot studies also identified that in undergraduate settings, the social annotation model-learning system helped increased learning gains, increased optimal academic achievement, and improved positive affective responses to learning (Razon, Turner, Arsal, Johnson, & Tenenbaum, 2012). Further empirical data also indicates that college students using the system improved reading comprehension and meta-cognitive skills in general (Johnson, Archibald, & Tenenbaum, 2010).

The social annotation model-learning system is thought to improve learning and performance through use of relevant activities including the following: (1) offering examples, (2) attempting practice, and (3) engaging in reflections and collaboration (Mendenhall & Johnson, 2010). Despite the promising initial findings associated with the social annotation model-learning

system, there is only scant literature into its use (see Johnson et al., 2010; Mendenhall et al., 2010; Razon et al., 2012). The present study is aimed at testing the effectiveness of a social annotation model-learning tool on undergraduate students' learning, affect toward learning, and development of complex thinking skills, given that in the current system students largely lack reading comprehension and learning skills (Hammond, Linton, Smink, & Drew, 2007), positive affects for learning (Willingham, 2009), and complex thinking abilities for critical thinking, and reflective learning (Joseph, 2010).

This research effort is significant in that it can help address the social processes-related shortcomings to the computer-supported collaborative learning. Within the current study, undergraduate students were instructed to use the social annotation model-learning tool HyLighter toward the completion of a reading assignment. HyLighter is designed to allow the user to highlight and annotate digital texts, and communicate with one another to further elaborate on the text. Specifically, students in the current study (1) highlighted and annotated a reading article, (2) reviewed peer and instructors' highlights and annotations, and (3) digitally commented on the reviewed highlights and annotations. The control group in the current study read the article without using HyLighter or performing the learning activities inherent in its use. Of interest was the students' (1) performance on a reading quiz, (2) affective responses to the reading assignment, and the (3) structure of their text summaries.

One way of assessing the effectiveness of a social annotation modeling-tool on reading comprehension and learning is by comparing mental model measures of student work with an expert or reference model. Mental models are internal symbols or representation of how one understands and views a phenomenon and the world (Jonassen & Cho, 2008). Johnson, Pirney-Dummer, Ifenthaler, Mendenhall, Karaman, and Tenenbaum (2011) posit that student mental models representations, a text summary or concept map representing their understanding of an article or text, is an operable way of evaluating students' comprehension of the learning materials (i.e., article, textbook chapter). Mental models are very complex, and while there are multiple ways of assessing them, there is not a single method that is agreed upon (Jonassen & Cho, 2008).

Pirnay-Dummer, Ifenthaler, and Spector (2010) describe a reliable Web-based tool, HIMATT (Highly Integrated Model Assessment Technology and Tools) that is used to assess mental models in academic or workplace settings. HIMATT analyzes external representations (i.e., text summaries) for structural (i.e., surface, graphical, gamma, and structural matching) and semantic similarities (i.e., concept, propositional, and balanced propositional matching) between the students' representations and a reference model (i.e., teacher or expert summary) (Johnson, et al., 2011; Pirnay-Dummer & Ifenthaler, 2010; Pirnay-Dummer, Ifenthaler, & Spector, 2010). Johnson, et al. (2011) conducted a study that validated the use of text summaries as a way to capture students' mental models, and, therefore, an appropriate way of assessing student comprehension and understanding of learning materials.

The purpose of this study was to test the effectiveness of a computer-supported collaborative learning tool (HyLighter) on students' learning, affect for learning, and complex cognitive skills within an undergraduate setting. Thus, it was expected that (1) HyLighter use would improve reading comprehension, i.e., students using HyLighter would score higher on a reading comprehension quiz; (2) HyLighter use would help generate more positive affect toward learning, i.e., students using HyLighter would report increased rates of positive-valence emotions;

and finally, (3) HyLighter use would enhance overall thinking skills in learners, i.e., students using HyLighter would display higher order thinking skills in short summaries of text reading.

Method

Sampling

Participants included 50 undergraduate students majoring in Education at a large southeastern university in the United States. Of these participants, 65% were female, and 35% were male; 70% were Caucasian, 13% Hispanic (Latino), 13% African–American, and 4% Asian/Pacific Islander. Prior to this research, students registered in a college-wide human subject pool and selected this study to participate for course credit. Participants were randomly assigned into two groups: (1) HyLighter group (i.e., Experimental) and (2) No-HyLighter group (i.e., Control). Students in the HyLighter group (N=23) used the social annotation tool. Students in the No-HyLighter group (N=27) did not use the social annotation tool. Participation lasted one session of approximately two hours for each student, and one researcher provided the instructions and administered the scales for the study.

Instrumentation

Reading Comprehensions Quiz. A team of three experts in the field prepared the quiz items. The quiz was designed in a multiple choice assessment format, and included three items aimed at assessing reading comprehension on the assigned article. Responses to each item were rated as either *correct* or *incorrect*. Total quiz scores ranged between 0 and 3, and corresponded to the total number of correctly answered items on the quiz.

Text Summary; Content-Conceptualization (HIMATT; Pirnay-Dummer, Ifenthaler, & Spector, 2010). Students were asked to briefly summarize (350 words) and provide views on the reading content. The open-ended question was designed to gauge their complex thinking skills. Students' complex thinking skills were evaluated via mental model measures (i.e., similarity scores between student text summaries and expert/reference model) using an automated web-based technology, HIMATT (Highly Integrated Model Assessment Technology and Tools). HIMATT was used to analyze structural and conceptual components of students' content-related representations (i.e., text summaries), and then compared students' mental conceptualization with the reference content-conceptualization (i.e., teacher/expert model) for similarities (Mendenhall, Kim, & Johnson, 2011). HIMATT analyzes the text, "tracks" the relationships between concepts within the texts, and creates a graphical representation of similarities (Johnson et al., 2011). Pirnay-Dummer (2011), Ifenthaler (2010), and Mendenhall et al. (2011) describe the similarity measures that include four structural induces and three semantic indices that are used for quantitative comparison of textual representations. These are the following:

Structural Indices

(1) Surface Structure – compares the number of vertices within the text. This represents the complexity of the model (i.e., how large the model is).

(2) Graphical Matching – compares the diameters of the spanning trees of the mental models. This is an indicator for the breadth of conceptual knowledge.
(3) Structural Matching – compares the complete structure of two concepts without regard to their content.
(4) Gamma Matching – also called 'density of vertices' – describes the quotient in terms of per vertex within a concept. Weak density mental models connect only pairs of concepts while medium density is "expected for most good working models."

Semantic Indices

(1) Concept Matching – counts of similar concepts within a mental model. This measures the differences in language between comparison models.
(2) Propositional Matching – compares identical propositions between two mental models.
(3) Balanced Semantic Matching – combines both propositional matching and concept matching to control for the dependency from propositional matching on concept matching: Only if concepts match, then propositions may match.

Learning-related Affect Questionnaire. The Learning Affect Questionnaire included seven self-report adjectives aimed at assessing students' affect toward the reading assignment. Each self-report item was rated on a 6-point Likert-type scale with anchors ranging from 0 (*not at all*) to 6 (*extremely*). The seven self-report items included three positive-valence emotions (e.g., excited, optimistic, and happy; Cronbach $\alpha = .80$) and four negative-valence emotions (e.g., worried, distress, uncertain, and pessimistic; Cronbach $\alpha = .60$). Learning affect questionnaire was similar to the Profiles of Mood States (POMS; McNair, Lorr, & Droppleman, 1971), except for a higher balance with regard to hedonic tone. The Learning Affect Questionnaire included two additional items aimed at assessing students' level of motivation for reading the article, and desire to read further articles. The motivational items were rated on an identical format Likert-type scale with anchors ranging from 0 (not *at all*) to 6 (*extremely*). The 2-item for the scale shared a Cronbach α of .56. All three scales (i.e., positive emotions, negative emotions, and motivations) share high ecological and face validities.

HyLighter Questionnaire. The HyLighter Questionnaire included 18 items aimed at assessing students' comfort using the HyLighter program. Amongst the items were the following: 'I will use HyLighter only when told to do so,' and 'HyLighter makes it possible to learn more productively.' Each item was rated on a 5-point Likert-type Scale ranging from 1 (*strongly disagree*) to 5 (*strongly agree*). The internal consistency (Cronbach α) of the HyLighter Questionnaire approximated .86, and its items shared high face and ecological validities.

Instructional Tool

This study used HyLighter as the instructional tool. HyLighter is a web-based social annotation tool that allows readers to digitally highlight and annotate a text. HyLighter facilitates spacious display of text-related commentary, and allows unlimited number of contributors to highlight and add comments. To insert comments, readers first block the

fragment of text to comment upon and then insert their comment in the comment box that avails. Once a fragment is annotated, HyLighter displays color codes on top of a web page linked to comments in the margins. This feature aids readers as they interact with selected fragments without burdening the margins. Figure 1 graphically illustrates the color map for the entries from a group of readers. An area highlighted by 'you' (the logged-in user) is displayed in yellow. Areas not highlighted by 'you,' but highlighted by one or more other readers, are displayed in shades of blue (the darker the shade, the more readers have highlighted the fragment). Finally, areas highlighted by both 'you' and others are displayed in shades of green. Of importance also, text-relevant comments are displayed in the margin or comment field. Finally, the system provides different 'views' that help the reader reviewing the group input, and/or assessing highlighted fragments and relevant comments via use of a range of searching and sorting options (e.g., by username, recommended changes, or date modified).

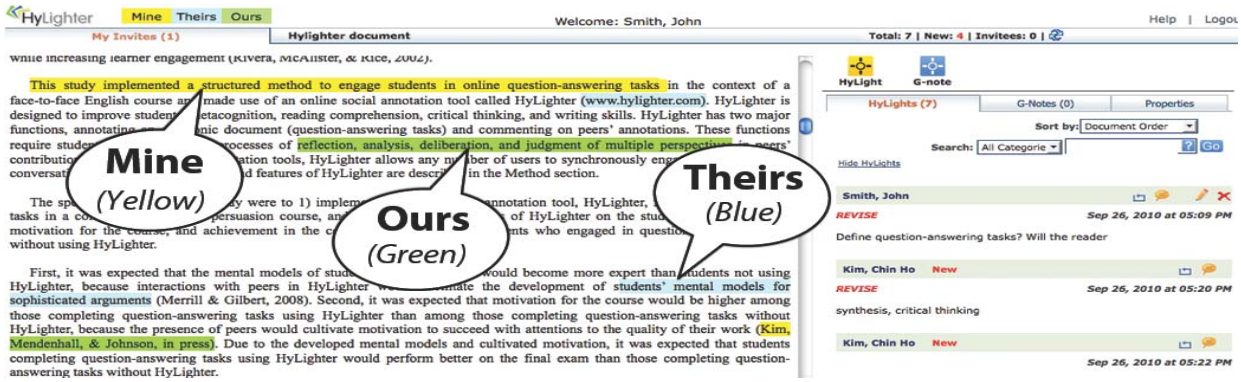

Figure 1. Color-coded map including comments in the margin (Mendenhall, Kim, & Johnson, 2010).

Instructional Method

The instructional method included the completion of an instructional activity using or not using the HyLighter tool. For the purposes of the instructional activity, students in the HyLighter group first read an article using HyLighter, i.e., digitally highlighting, annotating, and interacting with other readers, and the researcher. Prior to students' reading of the article, the researcher highlighted and annotated upon selected fragments of the text. These inputs reflected the researcher's thought about selecting fragments, and at times included text-relevant web links. Most of these came in forms of open-ended statements to prompt additional follow up/comments from the students (i.e., 'check this [website] out'; 'Is this really surprising'?). Students in the No-HyLighter group completed the reading assignment in conventional format using a paper copy of the article without use of the HyLighter tool.

Procedures

Prior to starting the study, three researchers selected a reading article, and developed the instruments. Prior to participation, participants signed an institutional review board-approved

consent form, and completed a demographic questionnaire. Students in the HyLighter group also received HyLighter training. The HyLighter training lasted approximately 30 minutes, and focused on how to use the system for best reading practices on the assigned article. Students in both groups first read the article. Approximately 45 minutes was allocated for completing the reading including the reading activities. At the completion of the reading, students submitted the article to the researcher and completed the reading comprehension quiz. Following, students wrote their text summaries of the article. Then, students answered the learning affect questionnaire, and lastly, the HyLighter group responded to the HyLighter specific questionnaire.

Results

Manipulation Check

HyLighter Specific Questionnaire. Students using the HyLighter strongly disagreed (i.e., ratings ≤ 2) with statements including, 'Given the opportunity to use HyLighter in the future, I am afraid that I might have trouble in navigating through it,' 'I would avoid learning a topic if it involves HyLighter,' and 'I would hesitate to use HyLighter in case if I make mistakes,' 'I feel uneasy using HyLighter,' 'I need an experienced person nearby when I'm using HyLighter.' Conversely, students tend to agree (i.e., ratings ≥3.8) with statements including, 'HyLighter does not get me anxious at all,' 'HyLighter provides more interesting and innovative ways for learning,' Using HyLighter is comfortable,' and 'HyLighter can make it possible to learn more productively.' In view of these ratings, students regarded HyLighter as useful, and valuable, for the learning experience.

Main Findings

Reading Comprehension. A one-way ANOVA was performed to reveal the effect of HyLighter use on reading comprehension (e.g., reading comprehension quiz; RCQ). The results indicated non-significant mean differences between the two learning conditions, F (1, 48) = .68, p = .41, n_p^2 =. 014. Figure 2 illustrates reading comprehension levels for the two conditions (i.e., HyLighter vs. No-HyLighter). The No-HyLighter group, relative to the HyLighter group, scored slightly higher on the RCQ. ($M_{No\text{-}HyLighter}$= 2.11, SD = .801; $M_{HyLighter}$ = 1.91, SD = .90, *Cohen's d* = .24).

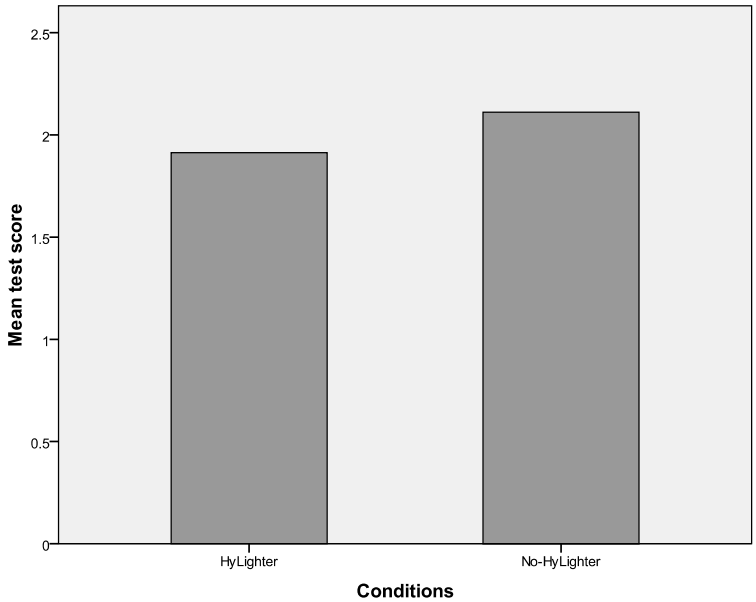

Figure 2. Mean performance on the reading comprehension quiz by learning method condition.

Learning Affect

Three separate multivariate analysis of variance (MANOVAs) were conducted for learning-related affect measures (i.e., positive-valence emotion, negative-valence emotion, and motivation to learn). The two conditions did not differ significantly on positive-valence emotions, *Wilk's* λ = .97, F (3, 45) =.39, p = .75, n_p^2 =.026, negative-valence emotion, *Wilk's* λ = .86, F (4, 44) = 1.84, p = .14, n_p^2 .14, and motivation to learn, *Wilk's* λ = .93, F (2, 47) = 1.66, p = .20, n_p^2=. 07. Though non-significant learning method effects were noted for positive and negative emotions' valence, students using HyLighter reported descriptively more positive emotions (*Cohen's d* range: .32 to .19), and negative emotions (*Cohen's d* range: .60 to .33) than students not exposed to HyLighter. Mean differences between the two conditions are presented in Table 1.

Table 1
Means, SD, and Cohen's d Values between Learning Conditions on Positive and Negative Emotion Valence, and Motivation to Learn

	No-HyLighter		HyLighter		
	Mean	SD	Mean	SD	ES* (Cohen's *d*)
Positive-valence					
Excitement	2.54	1.30	2.91	1.38	-.26
Optimism	3.15	1.19	3.57	1.44	-.32
Happiness	2.73	1.15	2.96	1.22	-.19
Negative-valence					
Worry	1.15	.33	1.30	0.56	-.33
Distress	1.08	.27	1.43	0.79	-.59
Uncertainty	1.62	1.10	2.30	1.15	-.60
Pessimism	1.27	.60	1.65	.83	-.52
Motivation					
To read	3.89	1.19	3.35	0.98	.50
To read more	3.22	1.37	3.04	1.26	.14

*Effect size

Complex Thinking Skills: Content – Conceptualization

MANOVA analysis pertaining to the HIMATT coefficients (e.g., seven mental model similarity indices) revealed significant differences between the two instructional methods, *Wilk's* $\lambda = .73$, $F\ (7, 42) = 2.25$, $p = .04$, $n_p^2 = .05$, Follow-up test of between-subjects effect revealed that the students using HyLighter obtained significantly higher mental model similarity (e.g., content-conceptualization) scores than students not using HyLighter on surface, $F\ (1,48) = 8.05$, $p = .007$, $n_p^2 = .14$, $d = .78$ graphical, $F\ (1,48) = 7{,}87$, $p = .007$, $n_p^2 = .14$, $d = .74$, structure, $F\ (1,48) = 14.03$, $p < .001$, $n_p^2 = .23$, $d = .89$, gamma, $F\ (1,48) = 8.68$, $p = .005$, $n_p^2 = .15$, $d = ,82$, They also were higher on the indices concept ($d = .33$), proposition ($d = .50$), and matching semantics ($d = .46$), but these were non-significant. These findings indicate the use of HyLighter during the learning process resulted in a substantial enhancement of content-conceptualization in these students.

Discussion

Collaborative learning is characterized by group of learners communicating and interacting toward one common learning goal (Akkerman et al., 2007). In the era of technology-supported education, computer-supported collaborative learning provides a unique platform for web-based collaborative learning (Jones et al., 2010). The efficiency and productivity of

collaborative learning are due to the increased active participation in the learning process (Morgan et al., 2000), aiding students' complex thinking skills (Sloffer et al., 1999), and overall enabling more self-regulation in students (Van Boxtel et al., 2000).

This said, to the extent that the computer-supported collaborative learning merges collaborative learning and the use of information and communication technologies, it might fall short from generating the most optimal learning outcomes measured on quiz performance (Dewiyant et al., 2005). Recent literature that addresses the effectiveness of computer-supported collaborative learning reveals that, as opposed to the conventional face to face settings, learners within computer-supported collaborative learning settings may experience interaction problems (Janssen et al., 2005), which could cause a lack of understanding of the group discussion (Thompson & Coovert, 2003), as well as an inefficiency in decision making (Fjermestad, 2004), and problem solving (Baltes, 2002). These difficulties may be due to collaborative learning setting primarily supporting cognitive processes, i.e., to the detriment of the socio-emotional processes otherwise inherent in group success (Kreijns & Kirschner, 2004).

To address this problem, the present study aimed at testing the effectiveness of a novel computer-supported collaborative learning tool: HyLighter. HyLighter is a social annotation model-learning system, hence its potential for facilitating social processes within a computer-supported collaborative learning framework. Specifically, the present study aimed at testing the effects of HyLighter use on undergraduate students' learning, affects toward learning, and development of complex thinking skills. The later is of vital importance because the students in the current system are known to suffer from a lack of reading comprehension and learning skills (Hammond, et al., 2007), positive affects, and motivation for learning (Willingham, 2009) as well as complex thinking capacities and higher order processes (Joseph, 2010). It was expected that the implementation of the HyLighter tool would improve reading comprehension and retention rates, generate positive affect toward learning, and enhance overall thinking skills in learners. Thus, this study contented that students using HyLighter relative to students not using HyLighter would score higher on a reading comprehension quiz, display higher order thinking skills in a reading summary, and report increased rates of positive-valence emotions at the completion of the assignment.

These contentions were consistent with previous findings attesting to the positive effects of the social annotation model-learning systems. Specifically, past inquiries revealed that in a community college sample, the use of social annotation model-learning system enhanced participation, completion rates, and improved reading and writing skills in learners (Lebow et al., 2004). Similarly, most recent inquiries showed that in college undergraduate samples, the use of social annotation model-learning system helped learning gains, academic achievement, and positive affective responses to learning (Razon et al., 2012) as well as reading comprehension, and higher order thinking skills (Johnson et al., 2010).

Conversely to the initial predictions, however, in the present study, students using HyLighter and students who did not use HyLighter did not significantly differ on reading comprehension achievement measured by a three-items quiz, but did show substantially stronger effect sizes on content–conceptualization (i.e., mental model similarities) indices. The groups also did not significantly differ in the valence of perceived positive and negative affects for learning though HyLighter engagement resulted in higher valence for both positive and negative affective variables. A plausible explanation for these findings can be the short-term nature of the

instructional task in this study. Student in the present study used the HyLighter tool during one session of two hours reading practice. Furthermore, students who participated in this study were drawn from a college-wide subject pool, thus most of the students participating in the study did not know one another prior to study. The latter is important because computer-supported collaborative learning best succeeds in groups that are cohesive, where the members share a sense of trust and community (Kreijns & Kirschner, 2004). The short term nature of this study, and the exposure to an innovative instructional tool, may not have allowed these processes to fully develop and resulted in similar quiz performance and both more excitement, optimism, and happiness on one hand, and worry, distress, uncertainty, and pessimism on the other hand in students using HyLighter. This explanation holds further true in view of the previously positive findings being associated with longer-term model implementations. Lebow et al. (2004), Johnson et al., (2010), and Razon et al., (2012) implemented the social-annotation model learning system for at least one semester throughout the particular courses that the students were participating in one or twice a week. However, to our knowledge, the use of HIMATT within the social annotation framework and the results revealed here are of substantial importance in the future of learning and research.

HIMATT was used to test how students' mental model representations (i.e., text summaries) are compared to a reference model (i.e., expert/teacher text summary) when learning under regular and enhanced HyLighter instruction. The findings indicate that the students using HyLighter conceptualized the reading material significantly better than the Non-HyLighter students as indicated by the structural indicators (e.g., surface, graphical, structural, and gamma). Significance in structural measures indicates that complexity (e.g., breadth of concepts, conceptual knowledge, and density) of both student and expert mental model representations were more similar when learners exchange notes and ideas about the learned contents than when they refrain from doing so. When students collaborate with their peers and critique their work, the students are evaluating and comparing their own mental models with that of their peers, thus requiring more cognitive processing, which deepens their conceptualizations, and in turn allow them to modify their own mental models to be similar to that of the expert (Merrill & Gilbert, 2008).

Students using HyLighter further reported slightly higher rates for negative-valence emotions including 'worry,' 'distress,' 'uncertainty,' and 'pessimism' (Cohen d_s range = -.29 to -.56). These results are somewhat surprising in view of these students' high rates of satisfaction associated with the use of the HyLighter tool. Drawing back to importance for the development of socio-emotional processes within learning communities (Kreijns & Kirschner, 2004), due to the short manipulation format herein, students may not have felt fully confident with their ability to communicate and/or learn online, or given the non-graded nature of this assignment, they may not have acquired a clear understanding of what was required for succeeding in the task. In fact, students are known to feel more positively about online learning as they increase confidence for online communication, and acquire a clear understanding of what is expected for succeeding (Palmer & Holt, 2009).

It is further known that in groups where the sense of community is not established, students may not fully recognize the task as a group-task, hence may perform individually and not collaboratively (Carroll et al., 2003). Thus, this possible confusion and sense of isolation may have somewhat contributed to these students' sense of 'worry,' 'distress,' 'uncertainty,' and

'pessimism.' Furthermore, consistent with these results, students using HyLighter also tended to report less motivation for completing additional reading assignments as compared to students not using HyLighter. To the extent that motivation for learning increase as a result of consistent positive emotional experiences (Meyer & Turner, 2009), as a result of experiencing somewhat negative affect, these students' motivation for future reading may have been reduced.

This said, in the present study, students using HyLighter also reported slightly higher rates for positive valence-emotions including 'excitement,' 'optimism,' and 'happiness' (Cohen d_s range= -.18 to-.30). These results, although consistent with the high satisfaction rates these students reported for the use of the HyLighter tool, remain surprising in the view of the aforementioned negative-valence emotions. It seems that regardless of the challenges the learning platform may present, students may have still perceived online learning as 'enjoyable' and 'fun.' Specifically, for students who may be generally feeling autonomous and competent in computer-assisted settings (Zhao, Yaobin, Wang, & Huang, 2011; see Deci & Ryan, 1989 for review), this task, despite its specific inconveniences, still may have been perceived as more exciting and fun than a conventional reading assignment format.

Taken all together, the results of this study confirm that to promote most optimal learning outcomes, any computer-supported collaborative learning tool should facilitate the development of social processes as well as the cognitive processes. To this end, an important implication of these findings could be first to prioritize the social aspects of these systems, and second to allow time for these processes to develop properly for short-term interventions may not typically lead to most optimal learning gains, positive affect, and motivation for learning. However, students in the collaborative group demonstrated gains in content-conceptualization, as indicated by the HIMATT mental model measures, despite the short exposure to the HyLighter technology.

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Discussion Questions

1. Based on the article you read, name one potential benefit and one potential shortcoming of Web-based computer-assisted systems in educational settings.

2. Provided that complex thinking skills training (i.e., critical thinking, reading comprehension, etc.) is a must in higher education, debate which system would be more likely to help achieve that goal: a conventional (paper and pencil) education system or a Web-based computer assisted education system.

3. If you were to design an online-distance education course, would you use the Hy-Ligther system? Please explain why or why not.

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What Teachers can Learn from Actors

Doug Barney and Dru Pilmer[34]

Abstract

This pedagogy article addresses the idea that, because of the performance aspect of teaching, a teacher can improve her or his abilities by using tools of the actor. In this article, we delineate four steps for actor scene preparation outlined in Robert Cohen's *Acting One*, and we relate these steps to teaching. Cohen calls these four steps GOTE: goals, obstacles, tactics (or "techniques"), and expectations. Individually, and as a whole, these steps are powerful tools for focusing and enlivening a performance. We then provide examples of three possible teaching goals and the GOTE preparation system.

Keywords

teaching, acting, performance, tools of the actor, pedagogy

Introduction

> "All the world's a stage, and all the men and women merely players; they have their exits and their entrances, and one man in his time plays many parts." (William Shakespeare, *As You Like It*, 2. 7. 139-142)

At some time in our lives, we all play the roles of teacher or mentor. Like the roles of an actor, these roles are played in a public forum. The audience members are those who came for the opportunity to see the performance. The audience members in our classrooms are the students who enroll in and participate in our courses. Rose and Linney (1992) state the following.

> Despite differences…[b]oth disciplines dignify previous experience, acknowledge emotions as sources of knowledge, and affirm the aesthetic traditions of our work. Teaching and acting both require that we express and perform our understanding of texts. The play is always reinterpreted by the director, the actors, the designers, and the

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> audience. Similarly, the official curriculum becomes a script in the hands of the teacher who includes, ignores, and interprets the canon through his or her own knowledge and experiences. (p. 24)

Our goal in this article is to provide insight on becoming the best supporting or lead actor possible in the classroom. We propose that students also serve as actors in the classroom. Hopefully, faculty and students are working together actively to achieve learning goals. Therefore, though often actors, teachers are also sometimes audience members in the classroom. The same is true for students. They are sometimes actors as well as sometimes audience members in the classroom. We will examine one aspect of acting as related to teaching: the GOTE preparation approach.

Acting as a Teacher

This pedagogy paper addresses the idea that, because of the performance aspect of teaching (as also suggested by Ronald A. Berk in *Humor as an Instructional Defibrillator,* 2002), a teacher can improve his or her abilities by using the tools of the actor.[35] This is certainly not a new concept. Gregory (2006), for one, rekindled his drive to be an outstanding teacher by taking an acting class. Gregory's active participation as an acting student gave him valuable insight into acting as a teacher. Gregory concludes that the best teachers operate in a manner similar to actors. That is, they incorporate (or consume) the information they want to get across so that this information becomes part of them. They no longer memorize lines, but internalize their roles. By doing this, they show their students the importance of the information in a dramatic context.

In this article, we delineate four steps for actor scene preparation, as outlined in Robert Cohen's *Acting One* (2002), and relate these steps to teaching. Cohen calls these four steps GOTE—an acronym that stands for: Goals, Obstacles, Tactics (for our purpose, we also will use the word "techniques"), and Expectations. Both individually and as a whole, these steps serve as powerful tools for focusing and enlivening a performance. We then provide examples of three possible teaching goals, and follow these goals through the GOTE preparation system used in acting. While walking the reader through the steps of the GOTE, this article incorporates aspects of acting in the discussion on each step.

First, let us dispel a negative connotation that some may have about acting—the notion that acting is "fake," and is, therefore, unworthy fodder for teaching. In our estimation, the best acting is truthful. The most effective actors are those who work to understand their character well and attempt to make genuine connections with the other actors (characters) onstage. These actors allow themselves to experience spontaneous reactions with real emotion; anything other than this pursuit of truth is seen as contrived and distances the audience from the performance. Furthermore, we assert the same holds true in any performance; whether classroom performance relies heavily on lecture or not, we still are performing in the classroom. Even if the teacher's role in the classroom is not that of lead actor, he or she still is a supporting actor. We propose that

[35] To engage students, faculty may want to present the classroom as an acting setting and introduce students to the steps outlined in this work. We leave that for individual faculty discretion. This work is intended to aid faculty with their classroom performances.

teachers can strengthen that role by using a preparation system used by actors: Goals, Obstacles, Techniques, and Expectations.

Goals

Actors and teachers each have goals. Watch a scene in a play or a movie. Each character has a goal for the scene. For example, in the play and movie adaptation of *A Streetcar Named Desire*, one of the most memorable scenes involves the character of Stanley Kowalski standing at the bottom of a staircase calling out, "[with heaven-splitting violence], 'STELL-LAHHHHH!'" (Williams, 1947, Act 1, Scene 3, Line 488). Moments before, Stanley, in a drunken rage, hit his wife Stella causing her to run upstairs to the safety of her neighbor's apartment. Stanley's long-term goal in this scene is to get his wife back. His short-term goal, however, is to make her come down the stairs to him.

Teachers also have goals in the classroom. These goals vary from long-range goals (such as goals related to material coverage for the semester) to short-term goals (such as what will transpire during a class on a particular day or moment). Without goals, teachers have no direction and are following the adage that "If you do not know where you are going, any road will get you there." Academia is seeing more emphasis on goals and assessment, but how can teachers assess whether they achieve their goals if they do not have goals?

If you are unfamiliar with a play you are attending, you can often read a synopsis of it in the program. This knowledge can make the play more meaningful and delightful for the audience. Do students know their teacher's goals for the course and for each subsection of the course? Sharing course goals with students helps build a connection with them by showing them what will be taught and learned. The process of sharing can be as simple as describing course goals in the syllabus (intermediate-term), or writing the day's goals on the board for all to see at the start of class (short-term).

The goals teachers share with students can be a mixture of detailed, material-oriented goals and broader, life-enriching goals. Detailed goals might include lessons such as learning what happens when lemon juice is mixed with sulfuric acid, or the order of the planets. Broader goals can include instilling a desire and recognition for life-long learning, or opening students' minds to diverse views and opinions.

Obstacles

Actors and teachers have obstacles. Nothing of value is attainable without some form of obstacle to overcome—be it money, time, physical or mental effort, or a combination of these. In the *Streetcar* scene, Stanley must overcome Stella's anger, hurt, and feelings of betrayal. Other obstacles he faces include his own drunkenness and his upstairs neighbor, Eunice, who is fiercely protecting Stella.

For teachers, the obstacles can be generalized into three categories: the limitations of students, teachers, and environment. In each of these categories, there are obstacles over which teachers have some control and obstacles over which they have little or no control. In general, teachers have the most control over their own limitations as teachers (e.g., they can attend

training, practice, listen and communicate with colleagues, and participate in teaching enhancement activities) and the least amount of control over students' limitations.

Teacher limitations can have a profoundly deleterious impact on student learning. If teachers lack enthusiasm or have a negative attitude, it will be clear in their teaching and go directly to the heart of their students' desire to perform well. After teaching the same classes for years, teachers often can become bored and stale in their teaching performance and their enthusiasm for teaching may wane. Sabbaticals are one method to help obviate teacher burnout. Teachers must use sabbaticals, semester breaks, and whatever means are at their disposal to bring freshness into their delivery whenever possible. They also must be willing to learn and continue to learn themselves. Not continuing to learn and grow has two ramifications. First, such stunting of growth and learning can tire teachers and make their classrooms appropriate venues for wakes. Second, teachers are role models for their students. Teachers serve as inspirational examples of the learning process they want to instill in students. Otherwise, teachers' actions belie their words, and the learning process suffers.

Student limitations include both their willingness to learn and their ability to learn. If their previous schooling was not quality education, students are not prepared properly for classes. This is a difficult obstacle as a student's prior education is generally beyond their teacher's control. Alternately, if the limitation is the result of student apathy, it is possible to overcome some of this apathy through the use of proper tactics and techniques, such as maintaining a high level of enthusiasm in the classroom, expressing confidence in a student's ability, and pulling the student into classroom discussions.

In the category of environmental limitations, some teachers have control over some areas, but not others. While teachers might petition campus administration for classroom improvements, that decision ultimately rests with administration, the state assembly (at public schools), and donors. If the environmental limitation involves the need for a particular space or materials for the classroom, teachers have more control over the limitation. Whatever the environmental limitation might be, teachers must be willing to overcome it as best as possible or accept it as is and work with the limitation. If a prop does not work for an actor, the actor must deal with the limitation to the best of his or her abilities and continue: "The show must go on." Likewise, teachers must not let an environmental learning limitation influence their teaching to the point that it is distracting from their performance. As a basic condition for learning, teachers must set classroom rules early on, such as rules that prohibit cell phones ringing, students reading on their Kindles, and other non-learning distractions. For example, many theaters now commonly ask that audience members turn off cell phones. This request is not unreasonable in classroom settings. If a cell phone rings during a class, how the teacher deals with the situation goes a long way toward setting the tone in the classroom. To be shaken by the cell phone shows students the teacher is easily rattled, but to do nothing can give the impression that cell phone use is condoned in the classroom. The best solution in this particular setting might be to remark on the cell phone in a manner that lets students know the interruption is undesired and then proceed with the class as scheduled.

Tactics-Techniques

As their character, actors use tactics in relation to other characters onstage to achieve their goals. Tactics are a way to convince people to do something through persuasion or force. Stanley's tactics in the scene cited previously include commanding and threatening his neighbor, Eunice; raising his voice, acting humble, crying, begging, staying at the foot of the stairs, and falling to his knees (Williams, 1947, Act 1, Scene 3, Lines 460-508). Likewise, teachers use tactics and techniques. Techniques are methods used (though not necessarily involving interaction with others) to achieve teaching goals. For example, learning the names of students is a technique. It is a tactic when teachers use this knowledge effectively in the classroom to call on students by name. Tactics and techniques are methods used to overcome obstacles in achieving teaching goals.

According to Coppens (2002), it is fundamental to teaching and learning that the teacher create an environment where students feel safe, that teachers adapt their tactics and techniques to the situation (e.g., material to be covered, characteristics of the students, class mood, physical environment), and that teachers be willing and able to improvise as needed. Just as in acting, if one tactic or technique does not work, teachers must try another. Teachers should lead and accommodate learning, with some correction to ensure the learning continues toward the desired goals. Teachers must ad lib or take a new direction, similar to what actors do when unforeseen obstacles or opportunities arise (Milner-Bolotin, 2007).

Actual tactics and techniques can have a variety of characteristics ranging from general support for the entire class to specific learning mechanisms for material. Tactics that are quite general and pervasive include acting as a role model for students. Teachers can talk about their life experiences and let their students know the road they have traveled and that they have faced many of the decisions their students are now encountering. Some tactics are obvious, more overt, and individually supportive. These include actions such as giving students an actual pat on the back, or applause for a job well done or for a question answered correctly. Some tactics and techniques help students learn detailed course material, such as using an (outdated) acronym to learn the order of the planets: "My Very Excellent Mother Just Served Us Nine Pizzas" (Mercury, Venus, Earth, Mars, Jupiter, Saturn, Uranus, Neptune, Pluto). Teachers also might try turning the tables on students. While this article is about teachers as actors, some teachers have students act in their (non-humanities) classes. Students attending Rogue Community College's English as a Second Language class act while they learn English; teachers interrupt the acting scenes so that students can discuss the actors' motivations (Achen, 2010).

One tactic must be constant throughout all teachers do—enthusiasm. This includes enthusiasm for the material, for the students, and for the learning process. Students' feelings and attitudes often reflect teachers' feelings and attitudes. Therefore, teachers' enthusiasm must be real, not fake, because students can detect fake enthusiasm because fake enthusiasm is nearly impossible to sustain. For actors, no on-stage movement is done without some message or emotion. Even the simplest classroom activity, such as returning homework or taking role, can give students insight into a teacher's emotions. If a teacher gets bored, he or she must regain enthusiasm, or lose his or her audience—much as an actor can lose an audience because of a lackluster performance. However, teachers have an advantage generally unavailable to actors—they can ad lib their performance to regain students' attention. Teachers, therefore, must be

attuned to the attitudes and energies of students to know when a change of pace (e.g., rearranging chairs, break, new exercise) is needed.

As more emphasis is placed on critical thinking in the classroom and in the AACSB (the Association to Advance Collegiate Schools of Business—the national accrediting body for Schools of Business) guidelines, teachers can expect students to examine their teaching more critically. After all, is that not the idea being taught through critical thinking? How teachers respond to critical student inquiries has an incredible impact on the tone of classroom discussion. While teachers may profess to teach critical thinking, active learning, and open communication in the classroom, if they respond negatively or in a derogatory tone to students' critical inquiries, they have effectively told students to do as they say, not as they do. Teachers teach best by example in the role of mentor.

Expectations

What are our expectations, given the above goals, obstacles, and tactics? The most engaging actors enter the stage with their character's goals in mind, expecting to achieve those goals. This is what gives their performance life and energy. How many would want to watch a performance in which the character holds no hope of achieving her goals? Such a performance would surely be a flop. Part of what makes Marlon Brando's movie performance so electrifying in the afore-mentioned scene, is that he, as Stanley Kowalski, clearly expects to get his wife back, that he will not give up until he does.

When a teacher enters the classroom, especially on the first day of class, expectations must be high; meaning, a teacher should expect great things from his or her class and individual students. A teacher's enthusiasm, coupled with high expectations, is what excites and engages students. If expectations are not high then students surely will sense their teacher's doubt, and this may create a sense of anomie. Indeed, if a teacher's expectations are not high, he or she should revisit the above goals, obstacles, and tactics to determine where the fault lies and what can be done to strengthen that area. The first day of class sets the tone for the semester. If teachers make a bad or weak first impression, they may not recover their students' confidence during the entire semester (Lavington, 1997).

Expectations must be high; further, teachers must be sincere in their expectations. While teachers may be able to maintain a façade of high expectations temporarily, this façade is sure to crumble in the face of repeated confrontation with lower than desired student performance. Holding insincere expectations means teachers should reexamine their goals, obstacles, and tactics and techniques. Perhaps the goals are too high, the obstacles are too great, or tactics and techniques need to be reexamined and revitalized. Remember, one obstacle is one's self as the teacher. If a teacher is not enthusiastic about his or her students and the learning process, he or she becomes an obstacle to students and their learning.

Expectations teachers hold with regard to their students are perhaps the most important link in the learning process. Do you, as a teacher, doubt the impact of your expectations on your students' performance? Rhem (1999) cites some interesting studies showing a strong connection between teacher expectation and student performance at all levels of education. These studies have cited evidence of a self-fulfilling prophecy in the learning process. If teachers hold positive expectations with regard to students then those students are apt to flourish (Eden, 1990). If

teachers hold negative expectations then students are apt to flounder. Belief in students' abilities comes across in a variety of ways, some overt and some subtle. As mentioned above, when considering actions in the classroom, all movements have some purpose. According to Rosenthal and Jacobsen (1992), "You can tell in about ten seconds of silent video how a teacher will be evaluated at the end of the semester" (p.38). Rosenthal found a strong correlation between evaluations by students who did not know the professor and the actual evaluations. If it is this easy for students who do not know the professor to evaluate "accurately" the professor then it certainly appears that non-vocal communication (e.g., movements) plays a strong role in sending messages to students.

Examples

Below are three examples that illustrate the four-step GOTE process. These examples are actual applications of the GOTE process that we used, and still use, in our classes and that have worked. The examples we selected are not technical, material-specific illustrations, but are meant to show how the process can be applied in practically any teaching-learning setting. The GOTE process also can work well when used for course development to achieve content-specific goals (e.g., learning how photosynthesis works, evaluating corporate financial statements, identifying weather patterns). While teachers may not agree with some of the obstacles and tactics we use below, we hope that does not deter them from seeing the possible benefits to be gained from using the GOTE method.

Example 1

Goal. As teachers, one of our goals is for students to come to class prepared. By prepared, we mean that students have studied the material assigned for that day and are ready to participate in class discussion and ask questions about material that gave them trouble. We have tried several methods to encourage students to come to class prepared.

Obstacles. Numerous obstacles might present themselves as barriers to achieving this goal, but three obstacles are most readily apparent.

Students have heavy time commitments outside class. These include work and family. We all have the same amount of time, but many of our students (Indiana University SE is a non-residential school with a high enrollment of nontraditional students) have a spouse, children, and full- or part-time employment to support the family. These students have returned to school with noble ambitions—to pursue a college degree and, thus, aspire to better employment with better pay. But, it is a catch-22 for them. To earn a college degree also means to give up something, such as current income or family time.

Another obstacle to student preparation can be elucidated using the comparison of the "learn me the material" mindset versus the "help me to learn" mindset. Some students come into higher education with the philosophy that teachers should "learn them the material" and that the burden of the work of learning lies greatly with the teacher.

A third obstacle involves students not making learning a priority, or a high priority. Part of this may be due to the time constraints and pressures discussed previously. Another part may

be due to students' desire for the degree, and the improved employment position they see will come with it, but not necessarily the education.

Tactics-Techniques. How do we overcome such seemingly difficult obstacles? The foundation for all our tactics and techniques must be enthusiasm and a positive attitude. Without enthusiasm and a positive attitude, all our attempts at a profitable learning environment may come to naught. Another key is to impress upon students (early in their college careers, or at least in our courses), that the burden for learning rests with them. Students must keep their families as a top priority, but we also need to convince them that learning, vis-à-vis an education, is the gateway to a brighter future, not merely a degree. As part of this understanding, students should pick a college major they enjoy. While some degrees result in better-paying positions than others, graduates will not be happy working in a field they find unpleasant. We should encourage students to pursue the discipline that interests them. If they enjoy the discipline then interest in the work, including the schoolwork, will follow. We are merely the tour guide, providing some direction. We must instill in them the idea that we cannot 'learn' them the material.

As a second part of the foundation tactic, *we* must always come to class prepared. If we are not prepared to teach, why should students be prepared to participate? We must lead by example.

As far as specifics, there are several ways to enhance student preparation effort. Starting material coverage with quizzes can entice preparation, although a word of caution is due here—making quizzes too difficult can be discouraging. Class participation, including calling on students in class, should help encourage them to prepare, especially if participation counts as part of the course grade. In-class team projects also can encourage them to prepare as a result of peer pressure, although team projects can also lead to free riders. Of course, we should remind them that comprehension increases if they learn as they go, instead of cramming for exams.

Expectations. If you want students to come to class prepared, you must expect that they will come to class prepared. If you start backtracking and teaching to the ones who do not come prepared then you have lost the incentive for students to come prepared. In essence, you must stick to your commitment to require preparation, and you must show them that you come to class prepared. We found giving quizzes at the start of each chapter pushed some students to come to class prepared, but others complained that having quizzes on material before the teacher covered it was "unfair." Letting the quizzes go until after material coverage, however, defeated the purpose of getting students to come to class prepared. We tried three strategies: quizzes at the beginning of class, quizzes at the end of class, and no quizzes. We found quizzes at the start of class enticed the best students to come to class prepared, but many still did not make the effort. Our conclusion is that no matter how we handled quizzes, some students would not prepare for class. We simply needed to ensure those individuals were not the driving force in deciding how to handle quizzes.

Example 2

Goal. One of our goals, as teachers, is to maximize class participation across students in our classrooms. While there is no way to get all students to participate at the same level, we would like to make each student feel comfortable participating and feeling as if her or his participation is desired.

Obstacles. Several obstacles present themselves as legitimate roadblocks to class participation. If students do not properly prepare for class, they will not be able to participate (at least in an informed manner). If the material is too hard for them, that is to say, they actually made an attempt to understand the material, but were unable to do so, they will be limited in their participation. In fact, they may feel uncomfortable asking questions when they have basic comprehension problems. Many students are shy or lack the confidence to speak up, more so if they are concerned about giving the wrong answer. If there are no points attached to participation, students may feel no reason to speak up in class.

Tactics-Techniques. Here are a few ideas that teachers might use to increase class participation.

- Get to know the students by name. Teachers calling on them is important to generating participation. Some teachers do this by taking pictures at the start of the semester and matching names with pictures. Other faculty use seating charts and ask students to sit in the same seat each period, at least for the first few class periods. Teachers also might try greeting students at the door as they enter or leave, shaking their hands, and having them provide their names.
- Get to know students outside class, possibly during office hours. This lets the students know that you are approachable and that you know them and are interested in them.
- Use the Socratic Method to question students. Ask them questions, and give them time to answer, if necessary. Leaving some free time in the classroom is one of the most difficult things to do. Teachers learn early in their careers that they must fill class time—after all, there is a lot of material to cover!
- Provide positive feedback for student questions and answers. Even if a student gives an incorrect answer, try to be positive—at least the student answered your question.
- Try to build a classroom community that is a safe haven for making mistakes.
- If possible, use a circular seating arrangement in the class, instead of a lecture-style seating arrangement. A face-to-face arrangement can lead to a more informal classroom style for the students.

Expectations. Teachers must start that first class period with high expectations for participation. Greet students enthusiastically and by name, if possible. Again, expect participation from the first class period. If teachers fall back into old teaching methods that lack or stifle participation then students will realize their contribution to class discussion is not valued. Faculty who know students' names, call on them in class, and provide a positive environment for input get better overall participation than faculty who rely on students to answer questions voluntarily.

Example 3

Goal. A third goal for classes is lifelong learning. Let us further define lifelong learning as instilling the desire to continue learning long after students leave the traditional learning environment (i.e., the classroom). To do this, students will need to learn how to learn, not just learn course material, especially as rote.

Obstacles. Students often focus on short-term goals, especially those with monetary rewards. While lifelong learning has a noble purpose, and we as teachers know it has its rewards, its rewards are harder to see than the short-term rewards of high grades and enhanced pay upon graduation. The greatest obstacle to instilling a desire for lifelong learning in our students may be our orientation as teachers. Many teachers have learned they must fill class time with material coverage, especially when class time is so limited and there is so much material to cover. Therefore, teachers get caught up in a fast-paced attempt to cover all the technical material possible without seeing the greater good of teaching students how to learn.

Tactics-Techniques. Certainly teachers must tell students that to continue to advance in their chosen fields and careers, they must continuously learn and grow. Besides telling them this, teachers also must practice what they preach. Therefore, teachers too must continue growing in their teaching. Teachers can do this by attending teaching-related seminars and conferences, and by leading teaching-related workshops. However, this is not enough. If students do not know that teachers are participating in learning opportunities then they cannot know teachers also practice what they preach. Teachers must tell students about their own learning activities, how teachers are also students.

Another tactic is to have alumni return to the classroom and explain to students about the material they used in the classroom and how they learned to learn and apply this material in their lives. In most college disciplines, the actual technical material will not stick with students. It is knowing how to learn, how to ask the right questions, and how to find answers that will stay with them for years to come. The diploma is not the end, but the beginning of learning.

Expectations. Again, teachers must expect students to be lifelong learners. To expect otherwise is to preordain the result. A positive attitude and enthusiasm go a long way toward bringing a point across. Students provide very positive feedback (verbally and on their end of semester teaching evaluations) to the visits from alumni. They indicate that these visits add credibility to what they learn in class and let them know they will use this information, and more, in their professional careers.

Summary

Teaching is acting. Whether teachers like it or not, faculty and students are on a stage, and the scene is the classroom, whatever that classroom is for them. We sincerely hope teachers can and will use the GOTE rubric in teaching-acting scenes. Break a leg!

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Discussion Questions

1. What learning goals did you have for your classes at the start of this semester? Should learning goals change based on the students we have a particular semester?

2. What can your campus administration and colleagues do to help you overcome obstacles to learning in your classroom?

3. How effective are your tactics at addressing your obstacles? Are better tactics available to you?

4. What can professors tell their students to emphasize learning expectations of the students?

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Life Forward

Barbara Bibas Montero
Co-Founder and Chief Marketing Officer

Interviewed by Hagai Gringarten, Editor-in-Chief

Barbara Bibas Montero is one of the founders of SafetyPay and currently holds the position of Chief Marketing Officer. She also serves on the Miami Beach Community Relations Board as Chair of the SMILE Campaign and on the Economic Advocacy Trust Board for Miami-Dade County. Previously, she ran her own direct marketing company in Spain, which serviced American Express and other financial institutions. She has held various marketing-public relations management positions with such multinational corporations as American Express, Coopers & Lybrand, and Inter-Continental Hotels. Barbara holds a B.A. degree from Boston College and an M.B.A. from Thunderbird School of Global Management.

Life is about stories. Do you have a favorite story that you use as an icebreaker?

First of all, I love stories and have published a few. As far as an "icebreaker" story, this one is my favorite as it relates to SafetyPay:

I was recruited out of Thunderbird to work for American Express Company in Miami, where I started out as an assistant manager in the marketing department. One of my first assignments was to help develop the Bank Approval Program in Latin America. My boss at the time asked me to provide him with data and updates on our efforts in Mexico. I had a tight deadline and was having difficulty obtaining information from a certain in-house consultant who wouldn't return my calls and seemingly was refusing to share the data. After many attempts to speak with him, I finally let my frustration be known to his secretary who finally passed me through. This conversation didn't go well, and I found him rude and uncooperative. He demanded that I transfer the call to my boss, and I firmly told him that I couldn't (it was actually physically impossible since it was in a different building across town) and that he should just call directly himself. I then hung up on him. I was fuming and feeling totally exasperated that I was not going to make the deadline. I told my boss what happened, but he didn't seem too worried about it – this guy, after all, was just an obnoxious consultant.

A couple of weeks later, I received an organizational announcement from New York headquarters announcing the hiring of the new Vice President of Strategic Planning, Marketing, and Sales. This person would be my boss' boss' boss, and it was none other than that same obnoxious consultant. I said "Uh-oh; I had better start updating the resume."

Thank goodness nothing happened, and I managed to stay under the radar until the annual Amex management meeting held in Key West. I dreaded the possibility of running in to him, but I did. It was at one of the receptions while I was talking to his boss, I heard him calling me from across the room. I didn't want to be rude, so I signaled to him to wait (thinking…who was this guy anyway?). He ended up coming over to us, interrupting our conversation, and formally introducing himself. To my surprise (and relief), he apologized for our previous conversation and for getting off on the wrong foot. The rest is history.

We were married three years later, on the exact same day we met, and at the same hotel in Key West. Thirty years later, we are running SafetyPay together (along with a terrific dedicated team), and he is the company's CEO. In fact, some of our friends from American Express are serving on our board and in advisory capacities (including his old boss). And, yes, we are still married and have "healthy" debates!

What is SafetyPay's business model, its focus, and mission?

SafetyPay is a global, secure, and easy online payment solution that enables online banking customers to make Internet purchases from merchants worldwide and pay directly through their own bank account in their local currency without the need for a credit card. Based in Miami Beach, SafetyPay currently operates in eight countries and serves as a secure payment facilitator and clearinghouse benefiting online shoppers, e-commerce merchants, and banks.

Unique from other methods of online payments, SafetyPay's focus and mission is to (1) share revenue with bank partners allowing them to monetize their online platform, (2) require no

enrollment or registration, (3) disclose no confidential or financial information, (4) guarantee no fraud as is inherent with credit card usage, (5) allow users to shop globally and pay locally in their own currency, and (6) enable merchants to receive payments in their currency of choice and have promotional access to millions of customers.

What are some of SafetyPay's greatest challenges?

As a startup firm, SafetyPay truly has started from scratch in terms of building its brand and recognition within the payments industry. It has taken time, but we are getting there. As a result of licensing restrictions, SafetyPay has faced challenges in getting the European markets up and running. However, in September 2011, we were one of the first payments companies to be granted a Payments Service Directive license in Europe and now are fully operational in several European markets.

What companies do you admire?

In general, I admire companies that make a positive contribution to the world and their success is derived from doing "good" business. Companies I admire are similar to people I admire: They are passionate, intelligent, trustworthy, resilient, ego-less, positive, and forward-thinking. For now, Google, Zappos, and USAA come to mind when thinking along these lines. But of course, I have to say I do admire SafetyPay and the team – what we have been able to accomplish together has been nothing short of amazing.

What is your long-term vision for SafetyPay?

Long-term, I would like to see SafetyPay accepted all over the world in every major market, connecting consumers with merchants and helping them have a safe and secure shopping experience.

What are the lessons that come to mind from your career?

There are many, but these three come to mind:

- Chase your passion – you will look forward to getting up in the morning.
- Trust your inner voice – it truly does know best.
- Learn new things everyday, and don't be afraid to get out of your comfort zone – it's good for you!

What elevator speech would you give your children about success in life?

Just because something doesn't work out at first, doesn't mean it was a failure. I can tell you countless times of how those little (and big) failures ended up being my blessings in disguise. Failure is merely a pit stop on the way to success. It teaches you to do better, be better, and appreciate better. I think Thomas Edison's quote on failure sums it up beautifully: "I have not

failed. I've just found 10,000 ways that won't work." One should not be discouraged when at first it doesn't work out. You need to keep trying and, most importantly, never give up. It always works out in the end…and if it hasn't worked out yet, it's not the end!

To Cite this Article

Gringarten, H. (2012, Spring). Life forward: Barbara Bibas Montero. *Journal of Multidisciplinary Research, 4*(1), 91-94.

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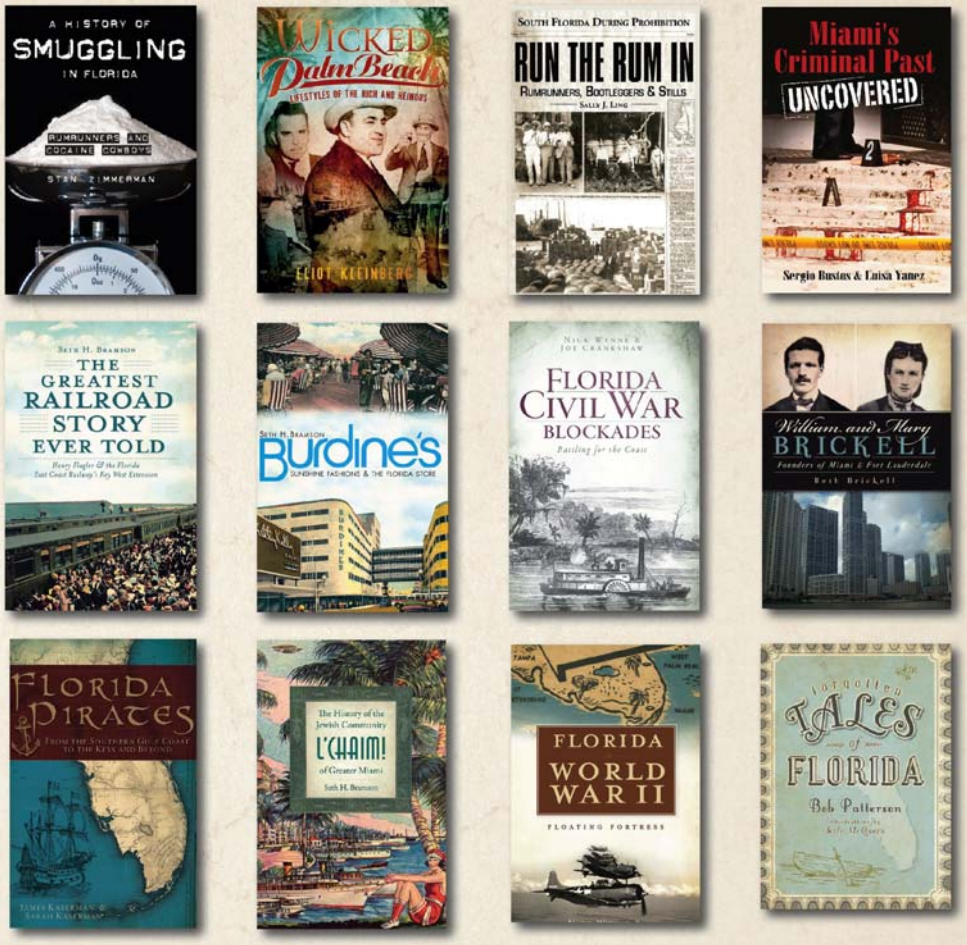

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STU VITA Founder Professor Mark J. Wolff,
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Book Review

Book Details

Bedell Smith, S. (2012). *Elizabeth the Queen: The life of a modern monarch*. New York: Random House, 688 pages, hardcover, ISBN 978-1-40006-789-3.

Reviewer

Gricel Domínguez, M.A., M.L.I.S.

Synopsis

Opening with an anecdote on the day Elizabeth learned her uncle had abdicated, Bedell Smith begins her biography of Queen Elizabeth II with a look at the child who would one day become Queen. Learning that her uncle, Edward VIII, had officially abdicated the throne, leaving her father, George VI, in the role of reluctant monarch, ten-year-old Lilibet, as family knew her, becomes heiress presumptive and takes on the daunting task of preparing for a future as Queen. Shaking the long-held tenets of the monarch's role to serve God and country above all else, King Edward VIII's abdication challenged public opinion of the monarchy and its part as a continuous presence in British society. It also placed a new level of scrutiny on the royal family and its ability to uphold unity and tradition, scrutiny that would eventually focus on Elizabeth.

Despite being members of the royal family, Elizabeth and her younger sister Margaret enjoyed a sense of freedom and ease during their early childhood. The changes to the line of succession resulting from Edward VIII's abdication placed new pressures on the Princess's upbringing. When young Margaret learned about her sister's new position as heiress presumptive, she astutely noted, "Does that mean you will have to be the next queen? ... Poor you," a precocious assessment of the demands that awaited her sibling (p. 21). The need for a well-rounded education became imperative once Elizabeth's future role was clear. No longer were grammar, reading, and composition enough, a much more rigorous education was necessary to prepare her for her part as Queen. Under the tutelage of professors and intellectuals from prestigious institutions, Elizabeth acquired knowledge on a wide range of subjects relevant to her new position.

It was this foundation that marked the beginning of the Queen's keen interest in current affairs and world news, an interest that Bedell Smith notes has been part of her daily routine since she ascended to the throne. Describing the Queen's relationship with the media and the delicate balance she maintains to avoid making statements that might be misconstrued, Bedell

Smith brings to light the difficulties inherent in maintaining such a careful, neutral persona and the challenge of inspiring equal discretion among members of the royal family and household.

Touching on issues such as the failed marriages of the Queen's children, Princess Diana's death, and the impact of negative press coverage on the royal family's reaction to these events, Bedell Smith provides a sympathetic look at the Queen's actions and the changes that such negative press wrought on her public persona. Describing the 1990s as a time of great strife and negative public opinion concerning the royal family, Bedell Smith also notes this period led to a reevaluation of the monarchy's place in British society, resulting in an effort to humanize the Queen and make her real to her people. With its details on the Queen's upbringing, social engagements, and love of horses and corgis, the biography serves a similar purpose.

Elizabeth the Queen presents the changing face of the monarchy as it evolves and adapts to modern society's demand for an approachable, visible monarch describing the journey that brought the monarchy from the days of radio broadcasts to adoption of YouTube, Twitter (@BritishMonarchy), and Facebook to publicize the royal family's work, charitable efforts, and appearances.

Evaluation

Sally Bedell Smith's unauthorized account of the life of Queen Elizabeth II, the longest reigning monarch in British history since Queen Victoria, is a fascinating portrayal of the Queen's role as a symbol of British history and tradition, while serving as a great primer in the history of 20th century British politics. The text is highly readable and rich with detail as Bedell Smith draws on personal anecdotes, interviews, official statements, writings, reports, and more to create a multidimensional narrative of the Queen's life and times. Relying on information and observations gathered from members of the royal family, friends, current and former palace staff members, religious leaders, politicians, world leaders, and others who have spent time in the Queen's presence, Bedell Smith's sources are thorough and varied, providing a lens through which to understand the many roles the Queen plays on a daily basis, both in public and in private.

Following the Queen's example, Bedell Smith avoids making overt political statements or taking sides when discussing major events and issues. As such, the book provides an effective historical framework for understanding the monarchy and its role in modern times, as well as how advances in media and communication have influenced the image of the royal family.

Though the Queen does not grant interviews or access to personal documents (her official papers and authorized biography will not be released until after her death), Bedell Smith's biography aims to provide as authoritative an account as possible. The work is a great read for anyone interested in the lives of the British monarchy, as well as the political and historical realities of modern Britain.

In the Author's Own Words

"There is never a moment in her life when Elizabeth II is not the Queen, which puts her in a solitary position and affects the behavior of everyone around her, even her family. She holds neither a passport nor a driver's license, she can't vote or appear as a witness in court, and she

can't change her faith from Anglican to Roman Catholic. Because she stands for national unity and must avoid alienating her subjects, she needs to remain scrupulously neutral—not just about politics but even innocuous matters such as favorite colors or songs or television shows. But she does have strong preferences and opinions that occasionally emerge" (p. 14).

Reviewer's Details

Gricel Dominguez holds a Master of Arts in English from Florida International University and a Master's in Library and Information Science from the University of South Florida. Her professional and academic interests include British history and literature studies, particularly Victorian women's history and writings, women's issues, and the use of social web technology for student outreach and education in libraries.

To Cite this Review

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Book Review

Book Details

Schiff, S. (2011). *Under the Yarmulke: Tales of faith, fun, and football.* Miami, Florida: Chai Books, 205 pages, paperback, ISBN 978-1-46649-890-7.

Reviewer

Hagai Gringarten, A.B.D.

Synopsis and Evaluation

The recipient of a Papal Medal from Pope Benedict XVI for outstanding service on behalf of interfaith relations, Rabbi Solomon Schiff is currently a visiting professor at St. Thomas University in Miami Gardens, Florida, and director emeritus of the Greater Miami Jewish Federation's Community Chaplaincy Service and the Rabbinical Association of Greater Miami. He holds a doctorate in pastoral counseling from the Hebrew Theological College, and he received the Israel Redemption Award from the State of Israel and the B'nai Avraham Award from the American Jewish Committee. Rabbi Schiff has appeared in various media such as 60 Minutes, Nightline, and Viewpoint, and in *Time, The Forward,* and *Promise.*

In his book *Under the Yarmulke: Tales of Faith, Fun and Football*, Schiff (2011) recounts his life's journey from a kid in Brooklyn to a world renowned Rabbi through smart anecdotes and intimate accounts of his encounters with religious, business, and political figures. He shares thoughts with luminaries such as Pope John Paul II, Pope Benedict XVI, the Dalai Lama, and former U.S. presidents Richard Nixon, Jimmy Carter, George H. W. Bush, George W. Bush, and Bill Clinton, as well as former Israeli Prime Ministers David Ben Gurion, Golda Meir, and Yitzchak Rabin.

Schiff became a Rabbi because of a promise he made to his father during a Holocaust rally at Madison Square Garden in 1942. He promised to take the place of his father's family and others that were lost in Europe. Although his speech teacher at Brooklyn College told him, "Schiff, I hope you don't choose a profession in which speaking is a part of it" (p. 15), Schiff asserted that as "inspired by my childhood experience with my father, I was determined to do much more" (p. 4).

We can learn about Rabbi Schiff's character from his wife. While on a trip to Chicago, he asked a friend about young ladies he could meet while in town. The friend responded with several names while mentioning one girl that he should not call because she was beautiful and will not go out him. Schiff's response was "That's the kind of girl I would like to meet" (p. 40). They were

married three years later. We also learn about his friendship with Joe Robbie, the original owner and managing partner of the Miami Dolphins football team. He recounts how after a "heartbreaker" loss, he went to visit Mr. Robbie at the "victory celebration" reception room where "the only two people in the room were Joe Robbie and Howard [Cosell]" (p. 96).

Under the Yarmulke: Tales of Faith, Fun and Football is a collection of stories and jokes encompassing Rabbi Schiff's career, such as when he was a young Rabbi, one of his congregants told him, "Rabbi, we didn't know what sin was until you came to town" (p. 57). We also learn how Cardinal Jean-Marie Lustiger, who was born a Jew and given to a Catholic family during the Holocaust, joked with him: "It would be most historic and ironic if he as a Jew and as a Cardinal would be elected as Pope" (p. 167). We also learn how Schiff's "beautiful friendship" with the Miami Archbishop, John C. Favalora, started with a story about another well renowned Rabbi visiting Cardinal Spellman and quipping, "How unusual is this? Here I am, wearing a black yarmulke, while you are wearing a red yarmulke. But we are always in the red and you are always in the black"—to which Spellman responded, "How I wish that were true" (p. 94).

Schiff's *Under the Yarmulke: Tales of Faith, Fun and Football* is collection of personal stories and lessons learned, where people can still have fulfilling lives with the motto "live and help live" (p. 91). Since life is a mosaic of stories, this remarkable story of the boy from Brooklyn who made good on his promise to his father and in the process became a distinguished Rabbi is worth telling. As Paula Ben Gurion, the late wife of Israel's first Prime Minister, once said about Schiff "This is a Rabbi" (p. 82).

In the Author's Own Words

"America is often referred to as a 'melting pot.' To me, this implies putting all the food in one pot, boiling away all the differences, and ending up with one uniform hash. I prefer the term 'dinner plate.' You have meat, potatoes, and vegetables, each with its own color, nutritional value, and taste. Together they make an interesting, attractive, and exciting meal. So are the benefits of diversity, which we should teach as a blessing and not a curse. This is the essence of the interfaith mission" (p. 144).

Reviewer's Details

Hagai Gringarten's doctoral research is in Global Leadership with a specialization in Branding. His research interest includes branding, international business, and marketing. He has authored a non-fiction bestselling book *Over a Cup of Coffee* (Shiram Shachar, 2000). He also pursued postgraduate studies at Harvard Graduate School of Business and the Kellogg School of Management. He currently teaches branding, marketing, and other business courses at St. Thomas University, and serves as the Editor-in-Chief of the *Journal of Multidisciplinary Research.*

To Cite this Review

Gringarten, H. (2012, Spring). [Review of the book *Under the Yarmulke: Tales of faith, fun, and football*]. *Journal of Multidisciplinary Research, 4*(1), 101-102.

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Book Review

Book Details

Bramson, S. H. (2011). *The greatest railroad story ever told: Henry Flagler and the Florida East Coast Railway's Key West extension.* Charleston, SC: History Press, 160 pages, paperback, ISBN 978-1-60949-399-8.

Reviewer

Lloyd Mitchell, M.B.A.

Synopsis and Evaluation

The first ever complete history of the Florida East Coast Railway's Key West Extension, *The Greatest Railroad Story Ever Told: Henry Flagler and the Florida East Coast Railway's Key West Extension* (2012) hails the building of the line from Homestead to Key West as the greatest railroad engineering feat in U.S. and, possibly, world history. The particular time, place, and actors that joined to create the rail line to Key West were a brief constellation of opportunity, unique in history. Only a visionary such as Henry Flagler could combine America's engineering prowess and an unprecedented private fortune to seize the opportunity that a railway link from New York to Key West afforded.

Written by Seth H. Bramson, a Barry University and Florida International University history professor, the book describes the extraordinary feat of how the extension came to be. Whereas past books have dedicated themselves either to the 1904-1912 construction or to the September 2, 1935, hurricane, which destroyed the extension, for the first time Bramson tells the complete story. Of the 94 photos in the book, 80 are from the author's private collection and have never been in print before.

Bramson, the Florida East Coast Railway Company Historian and author of 20 other books, has "given a face" to this great task. The book finally allows the public to understand not just the reasons for building the extension and the obstacles like the 1935 hurricane, but, also, how the railroad was operated later during the 23 plus years of its existence. As an authority on Florida railroad history, Bramson brings to light a neglected corner of our Florida heritage that is rich with history and narrative. I have been a fan of the author for quite a few years, and, frankly, I think and believe that it has to be one of the finest railroad line histories ever written.

I strongly recommend this book to readers interested in Florida railroad history, but also to those readers interested in discovering more about South Florida's legacy and the extraordinary venture of a savvy businessman through Bramson's unique and always interesting writing style.

In the Author's Own Words

Apparently, the fate of Florida was due to a chance visit, the way so many other future Floridians have come to the state since. "Fortunately for Florida – and for America – it was Flagler's imagination and ingenuity that caused him to make the decision to move to St. Augustine with Ida Alice following the 1883 visit, and it was that decision that changed the future and fate of the Sunshine State forever" (p. 24).

Building the extension in 1912 was a daunting undertaking. "When the time came, though, the only person in America capable of facing the task, fully cognizant of the obstacles and hardships that would have to be overcome in order to bring the Eighth Wonder of the World into existence, was none other than Henry Morrison Flagler" (p. 25). When tasked with assessing the possibility of creating a cross Florida rail link to the west coast of Florida, the engineer Krome said, "Mr. Flagler, there is not enough fill on the face of the earth to build a railroad across the Everglades" (p. 33).

Reviewer's Details

Lloyd Mitchell currently serves as the Chair of the Department of Business Administration within the School of Business at St. Thomas University, in Miami Gardens, Florida. His research interests include investments as well as financial and managerial accounting.

To Cite this Review

Mitchell, L. (2012, Spring). [Review of the book *The greatest railroad story ever told: Henry Flagler and the Florida East Coast Railway's Key West extension*]. *Journal of Multidisciplinary Research, 4*(1), 103-104.

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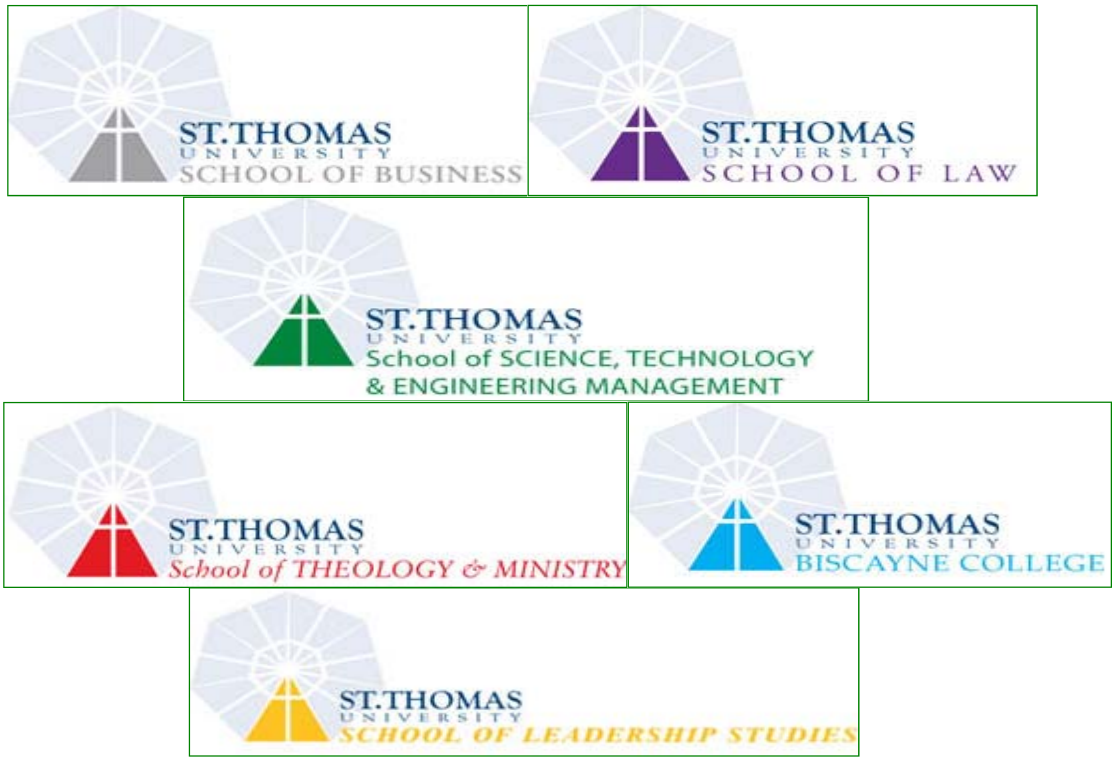
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