“So . . . I have asked you both here today to see if you would be willing to continue serving as co-chairs of the task force working on the first-year experience initiative,” Provost Callahan said as he started the meeting on that August afternoon. Mark and Sue glanced at each other, each knowing what the other was thinking. They had been at this task since March, and it was already very clear this was going to be an uphill battle.

Over the 6 years since Mark Jones had started as an assistant professor of instructional design at Bay Crest University (BCU), he had been asked to serve on various task forces and accreditation self-study committees associated with enhancing the first-year experience for incoming undergraduate students. Although this had seemed odd to many of Mark’s graduate-only College of Education colleagues, given that he did not teach undergraduate students, it was actually very much in line with his research related to using distance instructional technologies to facilitate students’ social and academic transition to college. That research had been well received by the field, and recently he had been promoted to associate professor.

Similarly, Sue Gulick’s master’s degree in student affairs with a concentration in leadership development made her uniquely suited to be involved in campus initiatives focused on core competency development for students, particularly over the first year. During her master’s program she had taken a number of instructional design courses and had even consulted on several design projects. Since coming to BCU 10 years earlier, she had risen through the ranks in student affairs and had recently become an associate dean of students. Co-leading this first-year experience initiative was a perfect fit with her new responsibilities in the Student Affairs Office.

But Mark and Sue had already been through the wringer on this task and, although neither was likely to shy away from a challenge, it was beginning to look like the idea of a shared first-year experience that combined both curricular topics (such as writing, critical thinking, and information literacy) and co-curricular topics (such as planning and
preparation, multicultural awareness, leadership, civic responsibility, and wellness/healthy choices) within the context of an interdisciplinary or theme-oriented academic course was something that would never happen at BCU. They had accomplished far less leading this initiative in the previous spring semester than they had hoped.

Background

Bay Crest University is a highly selective, research-intensive university with approximately 4,300 undergraduates and 2,000 graduate students. The university admits about 1,200 first-year students each fall semester. Although entering students do not commit to a major until their sophomore year, first-year students are required, on enrollment, to choose among Bay Crest’s three undergraduate colleges (engineering, business, and arts and sciences). Once there, students are often routed into highly structured, college-specific programs and requirements instead of having the flexibility to “test the waters” by taking courses in a variety of content areas. This disciplinary tracking also means that, other than the English 101 and 102 composition courses all undergraduates are required to take, there are few opportunities for shared intellectual experiences among students from different colleges.

Recognizing the need to provide some additional support for enrolled students’ academic and social transitions to college, the university created the First-year Experience Office (FYEO) within its Student Affairs Office 10 years ago. Since being established, FYEO programs for all newly admitted students had included:

- a May mailing of information about orientation and first-year programming (see Figure 14–1)

**FIGURE 14–1** May Orientation Mailing.
summer online synchronous conversations covering topics from the course request process to move-in day logistics
- theme-based pre-orientation weekend programs such as “Rehab Weekend” and “Sail School” (see Figure 14–2)
- a summer shared reading that explored multiple perspectives, ideas, backgrounds, or cultures, and provided opportunities to engage in follow-up on-campus discussions; and
- a required four-day orientation program the weekend before fall semester classes began.

The FYEO’s programming also included a required seminar of weekly two-hour meetings that extended orientation four weeks into students’ first semester on campus. This seminar was co-facilitated by a peer leader (upper-class student) and a member of the Student Affairs staff, with a few faculty volunteering to help as well. The focus of the seminar was to provide information to help students transition into their new environment. Topics ranged from exploring students’ individual identity development to exploring ways they could be proactive in creating curricular and co-curricular experiences at BCU that would help them identify and achieve their personal and professional goals after graduation. The summer reading selection was also incorporated into these discussions. Although the FYEO had not been able to get the faculty to agree to count this seminar for course credit, students who failed to attend these meetings risked having their spring semester course registrations delayed by 30 minutes. Because course registration at BCU was done online, a 30-minute delay could mean getting shut out of a section offered at a more desirable time or taught by a favorite instructor or, even worse, missing out altogether on a course required for one’s major.
The FYEO also offered several programs over the year to support new students during their transition to college on topics such as study habits, library skills, working in teams, leadership, multicultural awareness, and making healthy choices. However, these topics were rarely contextualized within academic conversations as part of courses. Although the faculty largely understood the need for discussing concerns that arise when young incoming students discover the freedom of college life, most believed these issues were best handled by Student Affairs staff—out of sight (and mind) of most faculty members. Besides, like many highly selective institutions, BCU’s remarkably low 3% to 5% attrition rate between the first and second year of college (as compared to national averages that hovered around 30% to 35%) meant the school did not appear to have any major retention issues around students’ transition to college.

That said, as in many similar institutions across the country, there was mounting evidence to suggest that current incoming BCU students needed additional support to handle the academic and social pressures they were experiencing. Midyear surveys collected annually by Student Affairs indicated that current first-year students were increasingly feeling “overwhelmed,” and the student emotional health ratings were at their lowest levels in the 15 years the surveys had been administered. Many respondents reported lacking the basic life skills and mechanisms for coping with the substantial increase in responsibility and stress. At the same time, faculty complained about the growing numbers of students skipping their classes and performing poorly on course assignments. As “Thirsty Thursday” devolved into “Wet Wednesday” and then “Tuesday Boozeday,” the number of hospitalizations due to alcohol poisoning among BCU students, particularly those in their first year, was rising steadily each year. According to the results of the annual Student Affairs survey, current students were reportedly spending more hours each week partying than studying, and many suspected that students’ academic performance would also begin suffering as a direct result. Although first-year student retention had not been an issue for BCU in the past, the recent surveys conducted by Students Affairs indicated that it might well become an issue in the near future.

Further, faculty had begun expressing concerns that BCU first-year students were increasingly preoccupied with decisions about selecting a major and focusing as quickly as possible on a career specialty, rather than valuing the opportunities the college presented for becoming a well-rounded educated person. In fact, as part of a recent coastal states accreditation self-study, BCU had opted to explore the extent to which their transition-to-college programs were helping incoming students adjust academically to college, as well as meeting their personal and social needs. The self-study report had recommended that, in addition to other components of a revised first-year experience (such as improved advising, special-interest housing, and academic initiatives in the residence halls), the institution should create a “shared academic experience for first-year students that might also help them develop closer mentoring relationships with faculty.”

That said, there was also evidence to suggest that the faculty still had not agreed that this shared intellectual experience should take the form of a course to be added to the curriculum. In fact, the same coastal states accreditation self study committee had recommended against that approach, citing the practical barrier of adding another required course to students’ already overloaded academic programs as well as BCU’s
long-standing preference for maintaining a program of more flexible, discipline-specific requirements, instead of adopting a core curriculum. Further, it was unclear exactly what the learning outcomes for a first-year course should be. It had been difficult even to come to agreement among the colleges on what term should be used to describe desired first-year outcomes (e.g., improved communication skills, technology and information skills, multicultural/ global awareness, and teamwork/collaboration skills). Should they be called learning objectives? Competencies? Understandings? Knowledge? Common skills? Orientations?

**Year 1**

At its January meeting, BCU’s Board of Trustees urged Provost Callahan to make the implementation of an enhanced first-year experience among the top priorities for the new calendar year. To this end, Provost Callahan asked Mark and Sue to co-chair a “First-year Working Group” made up of six key Student Affairs staff and 20 volunteer faculty as well as the associate deans from each of the three undergraduate colleges: Peggy Smith from Arts and Sciences, Hank Levitt from Business, and Eli Strauss from Engineering. By May, the group was to select a “reasonable” number of curricular and co-curricular outcomes for the first year, identify key elements of an enhanced first-year experience, and describe how objectives for first-year students might be assessed.

The group commenced with a March 4th retreat that began with the provost giving the working group their charge and encouraging them to think creatively about how BCU might develop a truly extraordinary first-year experience for its students. “Although I don’t want you to lose sight of the recommendations of previous committees, I don’t want you to repeat their efforts, either. I’d really like you to think outside the box on this.”

When the provost had left the room, Hank began, “Well, anything we do is going to need to be aligned with our business college professional accreditation standards.”

“That’s true for us as well,” Eli interrupted. “We just received the new engineering standards, and we’ve been struggling with how we’re going to fit them into the curricula for most of our programs. They’re already jammed full of courses!”

Sue noted, “I’ve reviewed the standards for business and the new engineering standards. The good news is that both sets of standards appear to be well aligned with what the previous reports recommended as suggested outcomes for an enhanced first-year experience—at least the academic skills.”

“If that’s the case, then why do we need to do more in the first year?” Hank asked. “We just finished revising the first-year business course to make sure it addresses those standards and, although there may still be a few things to tweak here and there, it seems to be going pretty well. Plus, all the discussions are contextualized within a business framework, which better prepares our first-year students for their business majors.”

“Does your course help students learn to make healthy choices? Or develop multicultural awareness?” Sue asked.

“But aren’t those topics better left to professionals who have been trained to address them with our students?” Peggy interjected.
Case Study 14: Mark Jones and Sue Gulick

“All I know is we’re going to need a lot of help if we’re going to be expected to address those sorts of ‘soft skills’ in our courses,” said Eli with air quotes to punctuate his concern. “Plus, I’m not convinced the classroom is the best place to have those sorts of discussions.” Turning to Peggy, Eli asked, “Does your college have an accreditation body you have to answer to?”

“There’s no single accreditation organization for the entire college,” Peggy responded. “I believe chemistry or biology might have something, but I’m sure theatre and philosophy don’t. I’ll have to check.” After a short pause she added, “I have to say that getting faculty from all the diverse disciplines in our college to agree on a set of common learning outcomes won’t be an easy task. They just don’t speak the same language about these sorts of things.”

After almost 90 minutes of discussion of desired first-year learning outcomes, Mark capitalized on a lull in the conversation to jump in. “Maybe we should try to avoid getting bogged down in a discussion of what the common outcomes might be—even though I think we are actually closer to agreement on those than may be apparent on the surface.” Looking at his watch he suggested, “In the time we have remaining, how about if we set aside the outcomes discussion and try to start envisioning what an enhanced first-year experience at BCU might look like?”

“That’s another thing that concerns me about all this,” Peggy worried aloud. “We have approximately 1,200 new students arriving each fall. Whether this is a course or a seminar or some sort of experiential activity, in order to keep the students engaged and the discussion meaningful, it sounds like we’re talking about small groups of students . . . say, around 20? And now we’re talking about those groups being co-facilitated by both a faculty and staff member? That’s 60 faculty and 60 staff!”

“Yeah, I don’t see how we can make that work without significant additional hiring,” Hank agreed. “Not to mention the facilities resources that will be required as well.”

Mark asked, “Well . . . since we’re brainstorming, is it possible there are existing courses or projects that could be dropped in order to accommodate the personnel demand?”

“Whew . . . I don’t know about that,” Eli responded. “What I can tell you is that I believe faculty course loads and enrollments within those courses have been slowly increasing over the past several years while we’ve been in this faculty hiring freeze. At the same time, folks aren’t rewarded for teaching overloads: as you know, the coin of the realm is research and publications. To be honest, I’m not sure how we could persuade faculty to get involved in an enhanced first-year experience. I don’t even know if there are any incentives we could offer to make it attractive.”

Over the next several weeks the group met five more times to hear reports from each of the colleges and key offices within Student Affairs about what currently existed in terms of “formal” first-year experiences on campus and the various “wish lists” each had for what a revised experience might include. Although it appeared to Mark and Sue that some common themes were emerging around ideas such as communication skills, technology and information literacy skills, teamwork and collaboration, intercultural awareness, career exploration, academic integrity, problem solving, time management, and critical thinking, when the time came to draft the report for the provost, it was clear there was less consensus around these ideas than the pair had thought. “I know I missed the last meeting,” Hank
wrote in his e-mailed reply to the first draft of the report, “but I don’t believe we specifically agreed on these outcomes as being the ones we want to tackle.”

And, although the group did come to consensus fairly quickly on the need for tighter coordination of curricular/co-curricular activities between the colleges and Student Affairs, there was little agreement around what the key elements of a comprehensive first-year experience might be. “I really like the idea of forming learning communities within the residences in which students spend part of their first year working on an interdisciplinary project, but who on the faculty is going to be willing to do that?” one of the faculty from Arts and Sciences asked in his response to the draft. A business faculty member on the committee was far more direct: “If you don’t remove the discussion of pre-major cross-disciplinary advising of first-year students from the report, then please remove my name from the list of contributors.” By May, Mark and Sue were left with little to report in terms of the group’s decisions about desired first-year outcomes or key elements of an enhanced first-year experience, much less any direction on how the desired first-year outcomes might be assessed. The group’s primary recommendation in their one-page report was to reconvene a similarly constituted group in the fall to explore these topics further.

**Returning to August, Year 1**

Sensing Mark’s and Sue’s hesitation after asking them if they would be willing to continue serving as co-chairs of the first-year initiative, Provost Callahan quickly added, “I gather from your report that you accomplished less in the spring than you had hoped?”

“Yes,” Mark replied. “We had lots of good discussions and heard many really terrific ideas, which we were prepared to present in our report. But, frankly, as soon as we put some of those desired outcomes and key elements down on paper, folks backed off. I’m not sure what happened there, exactly.”

“Well, to me it feels like the faculty just can’t see the forest for the trees,” Provost Callahan observed. “It’s easy to get bogged down in the logistics of something like this . . . some of which are much bigger problems than others. What if we tried to eliminate some of those barriers by reducing the scale a bit? Instead of trying to tackle all aspects of an enhanced first-year experience, how about if we just start with a credit-bearing course or project or activity or something that we pilot next fall with around 200 undergraduate students? Once faculty see how successful it is, they’ll want to get on board. Then we’ll be able to talk about eventually scaling it up to include all incoming students.”

“Well, it certainly seems like piloting something like this with just one-sixth of the incoming students should be a fairly benign request to make of the colleges,” Mark noted.

“Okay . . . but if we’re going to ask incoming students to participate in this experiment,” Sue argued, “then it has to count for something—their English requirement, or the Arts and Sciences freshman seminar, or an elective, or something else toward their program requirements. It can’t be just something extra we’re asking them to do.”

“I agree,” said Provost Callahan. “I’m sure we can find a way to make that happen for these students.”
Fall Semester, Year 1

After having said yes to continuing as co-chairs of the first-year initiative, Mark and Sue worked with the provost to craft a call for faculty participation that was sent out via e-mail early in the fall semester. The hope was to recruit two faculty participants from each of the three undergraduate colleges; however, only three faculty members responded in total. When the co-chairs proactively recruited volunteers, they heard repeatedly that, although the common first-year course was a “good idea,” it was unlikely to offer anything more than the current individual college initiatives underway. In some cases the co-chairs were told by prospective recruits that they were being actively encouraged by their department chairs not to participate in the initiative. Other concerns revolved around the project’s long-term sustainability. One business faculty member responded, “Although I get that running the pilot is likely possible, what evidence do you have that the provost and the administration are really committed to an effort of this size in the long run?” He added, “I don’t want to waste my time working on the pilot if it isn’t ever really going to be possible to scale it up to the entire entering class.”

During the fall semester Mark and Sue also learned about two additional initiatives that had been started out of the university’s strategic plan implementation. The deputy provost, Cathy Lebanon, started working in September with the undergraduate college and associate deans of Student Affairs in an effort to synthesize the myriad campus-wide documents addressing student learning outcomes. Her goal was to come to some consensus around a shared set of competencies the university hoped students would have acquired by the time they graduated. Additionally, in October, the university’s Director of Student Writing, Gary Dolin, e-mailed Mark to say he had been charged by the Student Writing Committee and the provost to conduct a study of writing across the curriculum; he included a copy of his project plan in the e-mail. When Gary and Mark met to discuss the synergy between these two projects, Gary added that there had been some discussion within his committee about whether the old model of requiring two writing courses in the first year (English 101 and English 102) was still the most effective way to improve students’ writing and communication skills. Gary told Mark that it was looking as if his group’s report would likely recommend the second required writing course be refocused on applied writing in the disciplines and that it be offered later in students’ academic programs, perhaps in their sophomore or junior years.

Spring, Year 2

Despite Mark’s and Sue’s efforts during the fall semester to recruit volunteers, by the start of the spring semester of year 2, the design team was still made up of just two members of the engineering faculty (well-respected full professors with many years at the institution), one member of the business faculty (a new non–tenure-track clinical professor with administrative duties as well), one member of the arts and sciences faculty (a part-time, non–tenure-track professor from the philosophy department whose primary responsibility was really administrative, in the faculty development area), the director of the First-year Experience Office, the director of Student Leadership Development, and the two co-chairs, Mark and Sue.
Shortly after the start of the spring semester, the co-chairs met with the provost to request permission to put off the pilot course until the fall semester of year 3. They explained that the additional time would be necessary in order to build a program that the larger campus community would see as having added value for incoming students.

“It’s fairly clear to us that we need to do a lot more work garnering buy-in from the faculty in all three undergraduate colleges before we can have a successful pilot,” Mark began. “At the very least, it would be nice to have guarantees that whatever we design will actually count for something for the students involved in the pilot. As Sue mentioned in our last meeting, this cannot be just an add-on for the students who participate.”

“The other big issue we’re hearing from both faculty and staff,” Sue added, “is that folks don’t believe the institution is really committed to this in terms of resources. Before we can make any progress on the design of an enhanced first-year experience, it’s going to be necessary to come up with a clear plan for how this whole thing can be sustainable over time.”

Sue continued, “We have also learned there is a lot of good work going on right now within other working groups and initiatives on campus, such as the shared set of competencies and the student writing initiatives, that we believe should come first and be near completion before we begin designing an enhanced first-year experience.”

After some additional discussion, the provost agreed to the extension, but it was clear that there was not likely to be another. “I understand why this is going to take a bit more time, and I agree that it makes sense for some of these other components to be in place before your group moves forward with your planning. But we will be implementing something by next fall.”

### Preliminary Analysis Questions

1. What are the obstacles that need to be overcome in order to gain widespread support for an enhanced first-year experience at Bay Crest University?
2. What strategies would you suggest for overcoming each of the obstacles you have identified in question 1?
3. Assuming the pilot is successful, how would you suggest scaling up the first-year initiative to involve all 1,200 incoming students at Bay Crest University each year?

### Implications for ID Practice

1. What are the organizational characteristics unique to higher education settings that can affect the success of a wide-scale curricular innovation?
2. In a higher education setting, what role should an instructional designer be expected to play with regard to “selling” the project and garnering “buy-in” from key stakeholders for instructional interventions, and what strategies might he/she employ?
3. How can instructional designers ensure quality is maintained when a wide-scale curriculum project is scaled up in a higher education setting?