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What Every President and Every Chief Academic Officer Should Know about College and University Summer Sessions—Redux

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Abstract

Using as a framework a paper titled "What Every President and Every Chief Academic Officer Should Know about College and University Summer Sessions"(based on a 1997 North American Association of Summer Sessions conference presentation by Ronald Wasserstein), we explore the extent to which research findings over the intervening 24 years support or question Wasserstein's views. Topics include summer term organizational structures and administrative oversight, serving academic needs of students, instructional contributions and benefits of faculty, and the relationship of the summer term to the mission and goals of institutions. As well, we comment on Wasserstein's arguments encouraging the alignment of the summer term with the rest of the academic year and recommending membership in professional associations to support the functions of nascent and established summer term offices. Finally, and understandably not part of Wasserstein's discussion, we offer a perspective on the extent to which the COVID-19 pandemic has affected and will affect the role of the summer term within universities and colleges.

Introduction

While there is disagreement about when and where the summer term was inaugurated in a US four-year college or university (see Young & McDougall, 1991), there is no doubt today that it has become important to the overall operations of many US colleges and universities.[1] Schoenfeld and Zillman (1967) noted a half century ago that "even excluding the research and public service aspects of university summer work, the enterprise is hardly an insignificant one" (p. 6). Lytle et al. (2014) extrapolated from a relatively small sample of 65 four-year institutions that the summer term generated over $4 billion annually in gross tuition revenue and spent about 25% of that on instructor salaries and benefits to teach over 195,000 courses offered to more than 2 million students enrolled in the 2012 summer term.[2] There is no question that the summer term, by virtue of the numbers of students served and the generation and impact of its financial largess, has truly become "big business" (Schejbal, 1996).

This paper is a retrospective on a seminal paper by Ron Wasserstein, "What Every President and Every Chief Academic Officer Should Know about College and University Summer Sessions" (see Appendix A). Wasserstein, then associate vice president for academic affairs at Washburn University, first presented his ideas at the 1997 North American Association of Summer Sessions (NAASS) annual conference.

In our view, Wasserstein nicely captured most of the fundamental factors that make the summer term unique relative to other terms in the academic year calendar.[3] Our intent here is to review the literature to consider whether the assertions put forward by Wasserstein are as meaningful today. Needless to say, the extent of the literature varies across topics, which means where there is a paucity of literature less can be said about the relevance of Wasserstein's perspectives. For example, marketing and special programs are two areas where the literature is relatively scant, which suggests these are prime topics open for further research related to the summer term. Additional suggestions for further research are proposed in the Conclusion. At other times, our commentary drills down into topics of more current interest to summer term administrators,

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1 *Summer session/summer term*: For the purposes of this paper, we use *summer term* to refer to the period of time over which summer courses and programs are scheduled/offered. *Summer session* is used only when associated with an individual or institution/association that uses the term, as well as in reference to Wasserstein's use of the term.

2 *Course/class*: For the purposes of this paper, we use *course* as a defined unit of study (e.g., Introduction to Psychology, American History 101). *Class* is a part of a course whereby students attend multiple classes or do multiple lessons within each course, usually defined in time periods.

3 *Semester/quarter/term*: These words define the length of time over which courses are taught within an academic year calendar. Depending on the institution, the academic year is divided into *semesters, terms, or quarters*. While academic schedules vary, universities and colleges in North America typically divide the academic year into fall, winter, and summer terms or fall and winter semesters and a summer term. Institutions on a quarter system divide the year accordingly into fall, winter, spring, and summer. In this paper, we use *term* most often to describe the summer period or in reference to the other parts of the academic calendar that are not summer. In fact, approximately 85% of Title IV US four-year colleges and universities are on the semester system, and 13% are on the quarter system.

such as those related to summer term organizational models, changing student diversity, student motivation to attend summer term, and teaching in compressed format summer courses. We summarize Wasserstein's major points in italics to introduce each section, followed by our review and commentary.

1. Someone Has to Be in Charge

Wasserstein recognized the diversity of administrative models in summer session, ranging from those that were highly centralized to those that were decentralized, with a large array of institutions in between. Inasmuch as campuses have their own unique climates, cultures, and administrative styles, he concluded that someone should be in charge with a clearly defined responsibility for summer session budgetary decisions and operations, even though the precise reporting relationships within the campus administrative hierarchy might vary from one institution to another.

How the summer term is organized, overseen, and positioned in the administrative hierarchy are key, long-standing issues. There are different perspectives to consider about these organizational issues—whether to create a centralized versus decentralized structure; who (academic vs. administrative staff) is best qualified to lead the summer term; and what that person's or unit's reporting relationship should be within the university structure. Perhaps most important, do summer term performance outcomes (enrollments, revenue generation, student access, graduation rates) vary as a function of differences in organizational models?

Summer Term Organizational Models

In its earliest incantation, summer term was a separate unit with little or no direct institutional oversight (Young & McDougall, 1991). This organizational model, described as highly *centralized* (Kops & Lytle, 2013; Lytle et al., 2014), consisted of a single- or multi-person office charged with oversight of all functions and services of the summer term. This model has prevailed, albeit in many cases evolving into *hybridized* models with functions and services shared with other campus units and departments. In a study of Canadian universities, Kops (2010) found that 80% of the 23 surveyed institutions with a summer term reported a centralized model or alternative model with key functions centralized, and 20% reported a *decentralized* model or alternative model with key functions decentralized. Kops and Lytle (2013) operationally defined the different types of organizational structures by analyzing summer term models using a 38-item functions/services survey to compute a composite centralization/hybridization/decentralization (CHD) score for responding institutions. Using the CHD scores, classified institutions ranged from a high score of 94% (highly centralized) to a low score of 16% (highly decentralized), with an average score of 51% indicating that the most common organizational model was characterized as hybrid. Judging anecdotally from recent changes in the membership numbers and composition of summer session associations, there has been a shift toward more decentralized organizational structures as the summer term is becoming increasingly embedded in the academic year.

Factors Affecting Summer Term Organizational Models

Support for a particular organizational model seems to depend to some extent on the set of institutional assumptions and beliefs held about summer term. Those who believe a centralized model is more effective generally hold assumptions that the summer term is different from other terms in the academic year. There is a recognized value in a centralized summer term consisting of a qualified group of academic and expert staff focusing attention and interest on summer programming. On the other hand, those believing the summer term is best administered using a decentralized model generally hold different assumptions—that is, summer term is more similar to than different from other terms with existing offices (registrar, enrollment management, student affairs) providing staff expertise, and colleges and academic departments offering requisite experience to develop, staff, and support the summer term. Recognizing these differences, Heikel (2000) recommended that the summer term should be administratively centralized and programmatically decentralized in order to maximize the benefits of both organizational forms. Interestingly, within institutions, no one organizational model remains in place permanently as they change from centralized to decentralized and back again, much like the swinging of a pendulum. Kops (1998) identified several critical factors driving such changes, including economic fluctuations; advances in instructional technologies; pressures to improve efficiencies, responsiveness, and flexibility; and changes in campus senior management.

Who Is in Charge of the Summer Term and Where Are They Located in the Campus Administrative Hierarchy?

According to the 2018–2019 *Joint Statistical Report* (Suske, 2018–2019), the primary responsibility for the summer term resided in the office of the provost (32% of the respondents), continuing education (32%), and enrollment management (12%), with the remainder (24%) spread among various academic administrative offices. Most individuals with responsibility for the summer term held the title of director/executive director (49%); dean (14%), vice president/vice provost (8%), and associate vice president/provost (5%), with the remainder identified as registrar, coordinator, or program officer. Although there is little hard evidence indicating that differences in location or title of those with oversight over the summer term have changed much over time, anecdotal observations suggest that, when located in the academic hierarchy, they may better focus on curricular planning and other academic issues. In contrast, when located in the administrative hierarchy, they may better address advising and other staff support facilities and activities; when located in market-driven continuing education/extension offices, they may benefit from staff expertise in support services, information and financial systems, and instructional design.

Does the Type of Summer Term Organizational Model Affect Performance Outcomes?

One important element in the ongoing centralization-decentralization debate hinges on the extent to which the different models might affect performance outcomes. To our knowledge, only two

published reports have assessed these possible relationships. Heikel (2000) reported that summer terms with centralized models, typically found in smaller institutions and funded primarily through self-generated funds, were self-perceived to be more financially successful and efficient in meeting student needs compared to those that were decentralized. Lytle et al. (2014) found differences in organizational structure had little or no significant impact on performance outcomes, including amount of tuition revenue generated, instructional expenses, or the number of summer student credit hours or courses taught.

As Wasserstein observed, "when everyone is in charge, no one is in charge"; therefore, it is important for universities and colleges to consider their assumptions and situational factors, and the experiences of others when determining what summer term organizational model works best for them.

2. Summer Session Should Be Designed for Students

Wasserstein believed the summer session must offer a well-planned curriculum delivered using schedules or formats that best meet student needs. Understanding and recognizing similarities and differences among students enrolled in the summer session and their reasons for enrolling should drive curriculum planning. Inasmuch as student participation in the summer session is almost always voluntary, better understanding student motivations and developing marketing efforts sensitive to these motivations are keys to successful summer session outcomes.

Wasserstein's advice was to offer a student-centric summer curriculum—designed to meet student interests and needs—with the right mix and number of courses appropriately scheduled. Nonetheless, several questions arise: Who are summer term students? What motivates students to enroll in the summer term? Which summer term scheduling options promote student learning? What marketing techniques are best used to increase summer term enrollments?

Who Are the Summer Term Students?

Wasserstein, like many others before him (Shoenfeld & Zillman, 1967; Young & McDougall, 1991), opined that, while the composition of the student body in the summer term was similar to that of other terms (because it consisted predominantly of regular degree students), it was also strikingly different. It is simplistic to think that the composition of the summer student body is a mere cookie-cutter image of other terms. The greater student heterogeneity, in part resulting from summer open enrollment policies, allows differentially motivated visiting students (earning degrees from other institutions), teachers needing certificate renewal, nondegree older students interested in personal enrichment or professional advancement, and younger precollege high school students to sit side by side with regular degree students.

An important factor Wasserstein did not address was the growing diversity of summer students and its impact on student access, including student enrollments, persistence, and attainment of degree objectives (Heller, 2001); institutional curricular design and delivery; and faculty teaching

strategies. For example, US national undergraduate student enrollments have climbed 33% over the last 2 decades; numbers of underrepresented minority students have increased 120% while the percentage of White students in 4-year Title IV colleges and universities has declined; female students (56%) now outnumber males; and the percentage of older students is slightly higher (Chen, 2017). While much has been learned (Adelman, 2006; Kuh et al., 2010) about how student diversity—including differences in student personal, social, cultural, physical, financial, programmatic, geographic, and academic characteristics (Heller, 2001)—affects faculty teaching and student learning outcomes during the "regular" terms, comparatively little is known about how and whether student diversity affects summer term outcomes.

In addition to recognizing possible research and institutional differences in who is enrolled in the summer term, there are also disagreements (Harris & Fallows, 2002; Patterson et al., 1981; Taylor et al., 2001) about precisely what these differences are, and the extent to which they might impact summer student access. Two recent but tactically different approaches are noteworthy for their efforts to improve our understanding about what kinds of students enroll in summer term. Smith and Read (2013) took an overarching national view of student diversity to determine whether students enrolled in the summer term differed from those enrolled in the preceding fall or following spring terms. Some characteristics of summer term participants—sex, age, ethnicity, class level (freshman, sophomore, junior, senior), financial resources, residence locations (relative to their home campuses), and familial financial resources—differed from nonparticipants in ways that were compatible with earlier published reports, but as noted these authors did not include assessments of whether these differences affected performance outcomes.

In contrast, the second approach was a narrowly focused, longitudinal-case-study view of summer term student diversity (Lytle et al., 2016; Lytle et al., 2018). In brief, these studies found that student diversity affected single and multiple summer term participation rates. Notably, two thirds of all students enrolled in one or more summer terms. Summer term participation rates were lower among University of California, Santa Barbara (UCSB) students who were male, of lower socioeconomic status, from underrepresented minorities, less academically prepared following high school, and had lower grade point averages after their freshman year. Higher 4- and 6-calendar-year graduation rates were found among UCSB students who were female, of higher socioeconomic status, nonminority, and had higher grade point averages following high school and after their freshman year at UCSB.

The Smith and Read (2013), Lytle et al. (2016), and Lytle et al. (2018) studies provide some insight into the impact of student diversity on summer participation and academic performance outcomes, but each approach has differential value to institutional administrators. Unfortunately, both approaches produce results that do not generalize easily to institutions. If Smith and Read's single-point, time-locked snapshots of summer term participants and nonparticipants are to be of use at the institutional level, then surveys of the type carried out by the National Center for Education Statistics, the Integrated Postsecondary Education Data System, or other agencies need to include

the summer term as a component of the routinized annual surveys. Similarly, the single-institution, longitudinal case study approach taken by Lytle et al. (2016) and Lytle et al. (2018) also has limited utility to other institutions given campus-to-campus differences in student composition, campus infrastructure, climate, location, and a whole host of other factors. Nevertheless, when the longitudinal case study is focused solely on an institution of interest, this approach provides the specific kinds of information needed to help the institution better understand where it has been, where it is now, and where it hopes to be in the future.

Even though Wasserstein didn't specifically raise the issue of student diversity, he astutely observed that a hallmark of a well-run summer term is one that includes a summer curriculum shaped by research-based facts so that it meets the varied needs of its students.

What Motivates Students to Enroll in the Summer Term?

Fish and Kowalik (2009)—building on the earlier work of Patterson et al. (1981); Chandler and Weller (1995), and White (1999)—surveyed and categorized student motives for enrolling in summer term. These motives included desire to complete degree requirements; preference for smaller and more intimate summer class sizes; interest in improving grade point averages; intent to attain a degree in 4 years; and opportunity to focus on one course at a time. Using factor analytic statistical methodology, Fish and Kowalik categorized summer student motives into several different motivational clusters—academic enrichment and career enhancement; perceived summer learning environment; impression that summer term work and grading might be easier; desire to improve academic standing; importance of summer as an academic semester connected to other terms; and opportunity to save money. Taken together, these clusters accounted for over half the variance underlying student reasons for enrolling in summer term. Using similar methodology, Fish and Kowalik surveyed student reasons for selecting a particular institution to attend in summer term. The principal reasons included familiarity with the institution's registration system and ease of enrolling and transferring credit; satisfaction with the institution's reputation; and access to summer employment. Students based their decisions to attend a particular institution on advice from other students or friends and information gleaned from the web, print materials, posters, and brochures. Their decisions to enroll in the summer were made mostly in the spring or by as early as the end of the previous calendar year. Done well, surveys and analyses of the type used by Fish and Kowalik (2009) might help individual institutions better understand how to market effectively to expand summer enrollments while maintaining curricular quality and meeting student needs.

Even on campuses with robust summer programs, one study found that less than half of students who were enrolled in the other terms enrolled in the summer term (Young & McDougall, 1991), although other studies found that over time, more than half of students enrolled in at least one summer term prior to earning their degree (Lytle et al., 2016; Lytle et al., 2018). Hence, factors other than those motives and intentions collected in surveys seem to determine whether students elect to enroll in summer courses. Fish and Kowalik (2009) studied the motives of these students

and concluded that some of them enrolled in summer coursework elsewhere because of lower-cost summer courses, the perception that the competitor institution had a more elite status, and/or more opportunities for unique educational experiences. Beasley and Aguiar (2016) found that the three most important factors for transient students electing to study elsewhere included perceptions that tuition and fees for summer coursework elsewhere were lower, the location of the competitor institution was closer to their family homes, and they were able to take summer courses not offered at their home institution. The transient students tended to be disproportionately younger, female, and White; to have better grades and stronger SAT scores; and to live farther from their home university.

Additional research needs to be carried out to better understand the critical variables that differentiate students who enroll in summer coursework at their home institutions or elsewhere from those who are summer term nonparticipants. Many summer nonparticipant students manage to graduate on time, but a substantially larger subset of them graduate long after the normative times established institutionally, or may never achieve their degree objectives. The dearth of research leaves us with only unsubstantiated anecdotal observations that summer term nonparticipants most likely include students who elect (or need) to spend their summers working, traveling, or returning to their home residences to visit their families and friends.

Which Summer Scheduling Options Promote Student Learning Outcomes?

Wasserstein noted that most college and university summer terms are wedged in between the end of spring and the beginning of fall term, which results in a summer term almost always shorter than the others. This constraint means that the breadth, depth, and absolute number of courses making up the summer curriculum can differ relative to the other terms. Nonetheless, most institutions strive to ensure comparability in classroom contact hours as well as student workload by increasing the frequency and/or duration of class meetings in summer courses.

Within the summer term, 76% of institutional respondents to the 2018–2019 *Joint Statistical Report* (Suske, 2018–2019) offered from three to seven different length sessions, with over half of total enrollments in courses scheduled in 5- and 6-week formats. While shorter sessions seem to be popular with students and many faculty, they do produce challenges—subject compression and the rapidity of midterm and final examinations—that may affect student performance. Regardless, there is signifcant amount of literature suggesting that "intensive courses seem to be effective alternatives to traditional-length classes regardless of format, degree of intensity, or field of study" and may actually improve mastery in certain but not all disciplines (Scott & Conrad, 1992, p. 451).

Several studies assessing academic performance in compressed courses generally claim that results are at least comparable to the same courses taught in full-length formats. Anastasi (2007) determined that overall academic performance was similar and course/instructor evaluations were comparable, regardless of the teaching format. Comparing courses taught over a full semester versus in compressed formats, Lutes and Davies (2013) found that grades earned were not

significantly different and reported student workloads were about the same. Simunich (2016) looked at student motivation and learning outcomes in two sets of online courses and concluded that student learning outcomes and motivation were not significantly different based on course length. Similarly, Martin (1997) concluded there were no significant differences in the average grades of students who took a summer course taught in a compressed format compared with students who took the same course in a non-summer term. Based on an extensive literature review, Martin and Culver (2009) claimed that courses taught in compressed formats were not inferior to semester-length courses and in certain situations were superior. In an exploratory study of the relationship between course length and student success, Sheldon and Durdella (2010) discovered that select courses offered in a compressed format saw students benefit in their retention of course material as well as their progress through the curriculum. Gaubatz (2003) found that student performance in compressed summer courses compared favorably to that in semester-length courses, regardless of their academic disciplinary focus. Even though science-based courses are often thought to be disadvantaged when taught in compressed formats, Arrey (2005, 2009) observed that students in his chemistry courses were better able to focus in the compressed courses and therefore achieved higher grades.

Despite this growing body of research, it appears that some faculty (oftentimes those who have never taught a summer course) and faculty senates at some institutions continue to have doubts about the efficacy of compressed summer courses. Lytle, based on unpublished work carried out when he was dean of summer sessions at UCSB, addressed these concerns by providing funding for a faculty-led academic senate assessment program in which summer term faculty were encouraged to apply for grants to assess student performance in compressed courses. Some of the projects entailed directly comparing summer student performance in the same course, taught by the same instructor, in a 3- or 6-week compressed summer format to performance in one or more of the standard 10-week fall, winter, and/or spring quarters. Student grades were the usual dependent performance variables examined in these studies, but in some cases student-authored papers or other academic products were evaluated at arm's length by faculty cohorts who were blind to whether these products came from students enrolled in summer or other term courses. Most, but not all, of these research projects showed little or no differences in student learning outcomes in compressed courses compared to outcomes in courses offered in the other terms.

Which Marketing Techniques Increase Summer Term Student Enrollments?

Wasserstein recognized the importance of establishing a good marketing plan that reaches students, especially since students seem to have many different reasons for enrolling in the summer term (Alexander, 1996; Beasley & Aguiar, 2016; Fish & Kowalik, 2009; Martin, 1996; Taylor & Doane, 2003). Knowing what these motivations are and aligning the summer term curriculum to address these student interests, or to supplement and expand upon student academic experiences that take place in other terms, can be critical to realizing the kinds of enrollment goals that might be set by the campus administrative hierarchy.

Goal setting—one of the key steps in developing a marketing plan—involves speculation about future events. Unfortunately, enrollment targets are oftentimes set unrealistically high and/or are driven by administrative needs and greed mixed with wishful thinking, rather than based on reasonable projections rooted in year-to-year enrollment changes. A modus operandi for summer term directors and deans should be to employ a research-based, data-driven analysis of enrollment growth to determine enrollment targets. Promising lower targets but also aiming higher than the analysis might warrant is an interesting strategy—most administrators are happiest when actual end-of-term enrollments exceed targets but are much less happy when reality falls short of over-stated expectations.

Almost all colleges and universities use an array of mass and targeted marketing techniques and approaches—such as branding the summer term, offering giveaways, and disseminating emails, newsletters, and other forms of electronic and print media—to reach their students and improve the attainment of enrollment targets. A recent survey reported about one third of respondents spent $50,000 or more annually on marketing (Kokorudz & Suske, 2016–2017). In addition to targeting students, some marketing campaigns are directed at parents and caregivers, since many college and university students depend on their families to fund their summer studies.

Penders (2014) argued that most, if not all, marketing efforts should be analyzed to determine their successes or failures. While tools such as Google Analytics can be beneficial, Bilella (2013) warned that website hits and other website analytic results do not necessarily translate into increased enrollments. Perhaps the most challenging aspect of developing a successful marketing plan has to do with knowing whether that plan succeeded or failed. Penders (2014) believed that every single marketing project undertaken must be evaluated before deciding whether to employ it again or try something else. He argued that most, if not all, marketing efforts should be analyzed using enrollment outcomes and/or net enrollment dollars generated to determine marketing plan successes or failures. Despite Penders' and Bilella's admonitions, Kokorudz and Suske (2016–2017) reported that while 84% of survey respondents said they used a variety of different indices to evaluate their summer session marketing strategies, a finer-grained analysis of the methodology used to make these evaluations showed that 68% focused their evaluative efforts on analyzing web-site traffic, Google Analytics outcomes, social media metrics, or student focus groups. Only 40% evaluated their marketing plans by tracking enrollments and/or enrollment trends relative to one or more prior years, and less than 10% employed return on investment (ROI) methodology—that is, how many dollars are spent on the summer term relative to the dollars ultimately generated. Focusing on enrollment growth alone, particularly in the context of looking at trends over time, does not account for the relative costs of implementing the marketing plan, nor does it provide a methodology for including the impact of institutional changes in summer term unit charges and other student fees. Properly applied ROI methodology has the potential to take some of these changes into account, particularly when the investment numerator includes total summer income generated by unit fees and other unduplicated head-count-related fee income.

There are other hurdles to getting an accurate estimate of the true cost of summer term marketing. It is relatively straightforward to track costs associated with printed materials and advertisements, direct mail campaigns, radio/television spot advertising, banners, giveaway promotional items, and the like. But it is much more difficult to track the true costs associated with website development and maintenance; social media campaigns and staff salaries for those campaigns; faculty instructor recruitment, hiring, salaries, and benefits; marketing staff salaries and benefits; and student advising and other communications. In the report of annual expenditures on marketing by Kokorudz and Suske (2016–2017), there was a lack of clarity about what was included in these estimates, making it difficult to compare what marketing the summer term actually costs across institutions. More importantly, it makes it difficult to use ROI methodology to evaluate the success or failure of any particular marketing effort within an institution.

Regardless of how a marketing campaign is implemented, tracked, and assessed, it is important to remember the old statistical canon that just because two things are highly correlated, it does *not* mean that one causes the other—in short, correlation does not imply causation. There are ways to address this problem, but a single evaluative tool is not an effective way to do so in most instances.

Some students do not enroll in the summer term because they lack needed finances (see Taylor et al., 2001). Financial aid—which can come from residual federally funded Pell Grants or by diversion from marketing budgets or other gift or earned income accounts—can be critical to increasing summer enrollments. Since a growing segment of the summer term curriculum now entails the delivery of distance and remote courses, the proliferation of off-site learning opportunities opens up more options to students who need/want to work, travel, or visit family and friends during the summer. It can make developing appropriate summer term marketing efforts more complex, since institutions must now compete to enroll their own students as well as visiting students. However, from the student perspective, synchronous or asynchronous distance learning opportunities provide greater flexibility than the face-to-face, campus-based, fixed-schedule courses that have been the mainstay of summer terms.

There is no disputing Wasserstein's call for a student-centric curriculum and schedule, which are critical to meeting student needs and increasing summer enrollments. What the research has added is a perspective on student diversity and learning outcomes, and an enhanced understanding of why students participate in summer term, that should be helpful in planning and marketing the summer curriculum.

3. Summer Session Should Benefit Faculty

Wasserstein contended that the summer session offers opportunities for faculty to earn supplemental income; innovate, experiment, and develop new or improved courses; and teach different students (visiting students, working professionals, precollege students) in smaller classes that promote a relaxed teaching-learning climate. For whatever reason they teach, there is an array of regular faculty,

adjunct instructors, graduate-student teachers, and visiting scholars who teach summer courses. Regardless, Wasserstein cautioned not to base the summer curriculum and schedule on faculty availability; in his view, it seldom results in courses and schedules that best meet student needs.

Wasserstein suggested it was important to develop a summer curriculum based on student needs, then devise methods and rewards to recruit and hire the best faculty available to teach those courses. While the opportunity to earn additional salary is an incentive for many regular faculty to teach during the summer, it alone does not always attract a full cadre. The result is that universities employ a range of regular faculty, lecturers, adjunct and visiting instructors, and graduate students to teach in the summer term. In a summary of findings from the 2014 *Joint Statistical Report*, Smith and Byrd (2015) reported 55% of summer term instructors were tenure-track (regular) faculty, 37% were adjunct/instructors, and 8% were graduate students.

Summer Instructional Salaries and Other Incentives to Teach

Although a few dedicated faculty are willing to teach voluntarily, and select others may be interested in "trade-outs" or reductions in teaching loads in the other terms, most faculty expect to be paid to teach in the summer term. A wide array of different formulae are used to compensate summer faculty. As reported in the Joint Statistical Report (Kokorudz & Suske, 2016-2017), 28% of publicly and 22% of privately funded universities and colleges determine summer faculty salaries as a percentage of their academic salaries per semester credit hour taught, 28% of public institutions pay as a percentage of the academic salary on a per course basis, and another 10% pay a flat rate amount per credit hour taught, with stepwise increments based on faculty rank. Privately funded institutions use similar incentives. Nonfaculty instructors are usually paid less, depending on their academic year rank and titles (lecturers, visiting faculty, graduate-student teaching associates and assistants), or on whether they are members of a union. Nonfaculty salaries are typically determined using a flat rate per course; a variable rate based on academic year salaries, student enrollments, and/or credit hours taught; and/or a combination of these factors.

Extra income is not the only incentive used to recruit and reward faculty to teach in the summer term. For example, two programs at the University of Colorado at Boulder offer interesting recruitment initiatives. Heinz and Lewis (2009) described how the university created a program, Faculty in Residence for Summer Term (FIRST), to enhance the range and quality of courses taught in the summer term by recruiting distinguished domestic and international scholars to teach. Over the 5 years of the study, the program proved successful in recruiting 63 visiting faculty to teach summer courses, as well as participate in collaborative research, colloquia, and outreach activities. Drake and Kilworth (2013) analyzed a grant program designed to incentivize departments to offer new and innovative courses, and also to encourage faculty to teach in the summer term. In the 13-year period reviewed, 455 new courses were offered with annual total grants ranging up to $125,000. They reported that, besides the additional income, faculty were keen to

participate because of the opportunity to test new course material, innovate with new curricular ideas, and more readily connect with students in smaller summer classes.

Summer Term Instructor Teaching Styles

Inasmuch as compressed courses dominate the summer term, many researchers have become interested in learning more about how instructors shape courses to better fit teaching in compressed formats. It should come as no surprise that faculty have different perceptions about teaching a compressed course and different ways of making adjustments to their teaching (Eagle, 2012). Wilson (2007) emphasized the importance of instructors' prioritizing learning to include "must know" (prerequisite knowledge and foundational ideas) and "need to know" (less critical at the moment but must know later), while placing less emphasis on "nice to know" (can be omitted without jeopardizing baseline knowledge). Similarly, Swenson (2003) focused on learning outcomes as a measure of learning quality, which changes emphasis from trying to fit the semester-length content into a more compressed format to a focus on what needs to be learned. Lee (2002) determined that time per se (number of weeks over which the course is taught) may be relatively unimportant when instructors adapt courses to shorter formats by setting clear learning outcomes, recognizing individual student learning differences, creating positive classroom environments, using short but frequent assignments, and providing regular feedback and support to students. In sequential studies, Kops (2009, 2014) interviewed high-performing instructors at two large public universities to gauge how they approached teaching compressed summer courses and compiled a set of best practices. Foremost were efforts to reorganize and redesign courses to fit the faster pace while taking advantage of smaller summer classes and more frequent class meetings. Kops also found some instructors used a longer planning horizon in the summer term by developing a detailed course plan that paid attention to key and more complex topics early in the course so as to give students more time to synthesize and understand these topics.

Instructors who analyzed their own experiences teaching compressed courses concluded that the experiences were more positive when they adjusted their teaching approaches and methods. Peca (1996) required prereading, scheduled more frequent tests to better utilize available study time, and extended due dates for research papers. Crowe et al. (2005) emphasized the need to change teaching methods, readings, assignments, and student assessments to meet the challenges of teaching in compressed formats.

Advantages of teaching compressed courses included better focus on learning, more collegial classroom relationships, more in-depth discussions, and stronger academic student performances (Gaubatz, 2003; Scott, 2003). Similarly, Crowe et al. (2005), DiGregorio (1996), Kops (2009, 2014), and Peca (1996) recognized that smaller classes and more relaxed settings allowed better interaction with their students, which, in turn, helped students connect to course material and enhanced their overall learning experience.

Faculty are aware of the opportunity to innovate, redesign, and experiment to modify how they teach in the summer. At the same time, they are aware of the opportunities to take advantage of smaller classes and continuity created by summer schedules. A metaphor used by one of the instructors in the study by Kops (2014) illustrated course redesign in this way:

> The content of the course is like a quart jar of soup: summer session requires that you fit the soup into a smaller jar, but as you attempt to get the soup into the smaller jar, some spills over. You have to be okay with some broth spilling, letting some broth go, but you need to be skilled to ensure that the hearty components of soup get into the smaller jar. (p. 15)

Summer Teaching and Student Diversity

As noted previously by Wasserstein, the summer term also provides faculty an opportunity to teach students who are different from those they encounter in the other terms. Faculty in two public universities that Kops (2009, 2014) studied recognized that the mix of students in the summer term differed somewhat in age, maturity, and motivation from those attending in other academic terms. As a result, instructors drew on the range of experiences and backgrounds of visiting students and working professionals (mostly teachers) who attend in great numbers in the summer to enrich the classroom experience. Some universities actively recruit and pay special attention to visiting and transfer students in the summer term. For example, Kokorudz and Levy (2013) and Lettiere and Kokorudz (2015) described efforts to recruit visiting students and support them to access information, resources, and advising, and ease admission to the summer term. Further, Miller and Durham (2014) documented a transition program for transfer students beginning their new academic experiences in the summer term. The program included specialized academic advising, focused workshops, and a credit-bearing orientation course. The summer term also provides an opportunity to teach younger students, recruited to summer precollege and head-start programs, who are eager to experience university for the first time.

The literature generally validates Wasserstein's earnestness about the advantages of teaching in the summer term, including the advantages of teaching compressed summer courses with smaller class sizes and more frequent class meetings. As a result, instructors take the opportunity to remodel teaching approaches, and experiment with new teaching methodologies to address these differences. The research provides evidence that the summer term, in addition to serving students, is a benefit to faculty, as well as to the overall teaching/learning enterprise of the university.

4. Summer Session Should Benefit the Institution

Wasserstein believed summer session benefits institutions by providing opportunities for students to stay on track to graduate; offering academic credit for visiting students; offering personal development and enrichment courses and programs open to the local community; providing faculty and staff employment opportunities; extending the use of campus residence halls, bookstores, food pavilions,

recreational facilities, and health services; developing and experimenting with new courses and academic programs; and generating revenue.

Even on campuses with robust summer programs, somewhat less than half of students who are enrolled in the other terms also enroll in the summer term (Young & McDougall, 1991). Despite lower numbers of students and fewer campus activities in summer, campuses are by no means ghost towns. In addition to offering undergraduate and graduate credit courses, many colleges and universities have long traditions of presenting a variety of noncredit academic, recreational, and enrichment programs for elementary and secondary students, and for members of the local community, that both generate revenue and enhance institutional outreach efforts and visibility. As well, special summer credit-bearing academic programs—precollege, freshman transition, and international student programs—are designed to prepare students to make smoother transitions to the university. Further, special academic programs—travel-study courses, internship placements, and preparatory and advanced graduate programs—offer unique educational opportunities available only in the summer term.

Summer Precollege Programs

Precollege programs are designed to enhance student recruitment, as well as generate revenue (Gallaher & Rios, 1997). These programs allow high school students to take credit-bearing courses alongside university-level students. These students also participate in structured workshops, tutorials, and other programs designed to improve basic study, writing, and mathematics skills that help students better prepare for the academic challenges of university life. Some of these programs also provide opportunities for high school students to live on campus to gain the full experience of university life, while others partner students with faculty research scientists, scholarly mentors, and performance artists to engage in cutting-edge research and other scholarly endeavors.

Summer Transition Programs for Undergraduate Students

Many institutions offer special summer programs for first-year (freshman) students (Agawu-Kakraba & Gaudelius, 2013; Hensley & Davis, 2016; Lytle & Gallucci, 2015a, 2015b; Nemelka et al., 2017) or transfer students (Miller & Durham, 2014) or both (Cowan, 2015; Herndon & Nemelka, 2016). These programs help students get a head start on their university studies, make up academic deficiencies, and ease transition to the university during the summer, when the overall pace is more relaxed and manageable. Programs typically consist of credit-bearing courses, orientation programs, and academic advising specialized to meet student needs. Other summer transition programs focus on international students to help them hone their English-language skills and become familiar with contemporary North American university life and social mores.

Summer Term Travel-Study and Internship Programs

Summer travel-study programs, typically taught in foreign countries, enhance and reinforce student learning experiences. Oftentimes these programs are led by university faculty with specialized knowledge and/or interest in the country who both teach credit-bearing courses and guide the structured travel experience.

Internship courses/placements provide students with experiential learning opportunities typically supervised and assessed by summer faculty. Internships place students in on- or off-campus paid or volunteer employment opportunities in private, government, or nonprofit organizations, including work-related internships in foreign countries.

Special Summer Term Graduate Programs

Summer term programs for graduate students are designed to provide opportunities to improve foreign-language skills or enroll in preparatory courses to make up academic requirements needed for specialized advanced degrees. In addition, some institutions offer concentrated graduate degree programs in the summer term, such as residential, full-immersion foreign-language programs that provide an opportunity to earn a master's degree in one or more summers. Others, such as the University of Wisconsin, offer doctoral students an opportunity to acquire teaching skills to add to their teaching portfolios (Bubenzer & Westphal-Johnson, 2003).

Summer Term Financial Returns to the Institution

Penders (2000) summarized revenue sharing as a process in which a portion of surplus summer term revenue is shared with academic [and administrative] units responsible for scheduling and staffing summer courses. Revenue sharing encourages efficiencies, develops summer term curricula based on student need, and makes summer term a shared enterprise between the summer term office, colleges and departments, and administrative and student services units. Almost 60% of survey respondents indicated some or all of summer term revenue surpluses were shared with the academic colleges/departments or programs (Kokorudz & Suske, 2016–2017). This revenue sharing happens using a wide variety of models that typically define how the revenue surplus is to be utilized, such as supporting summer term course and program development, providing student financial support, rewarding stakeholders (colleges/departments and programs), and/or contributing to the institution's general fund. Ironically, Penders (2000) warned successful revenue sharing arrangements may ultimately encourage decentralization of the summer term, such that the shares of revenue to colleges and departments are maximized by cutting out the intermediary (i.e., summer term office).

Wasserstein pointed out that the summer term is important to universities. The benefits to students, faculty, and the university he articulated are as meaningful today as they were almost 25 years ago. The summer term allows students to progress with their studies in a timely fashion, creates space for new course development, maximizes use of campus facilities, supports community

engagement initiatives, generates tuition and fee revenues, and, overall, serves the university's mission. We know Wasserstein would agree that, regardless of differences in the ways the summer term is organized, it is important that it aligns with the university's mission and goals.

While Wasserstein did an excellent job highlighting the benefits of the summer term to the university, he did not address the inherent difficulty in balancing student, faculty, staff, and institutional needs and wants. This summer term administrative conundrum is most apparent in juggling the disparate financial goals of students and their parents/caregivers (who expect the highest quality educational experiences at the lowest price), faculty (who want salaries commensurate with delivering quality teaching), staff (who are frequently asked to meet the support needs of the summer term, oftentimes without additional compensation), and campus administrators (who expect the summer term to deliver much-needed financial returns to the university). Additionally, both faculty and staff may not be enthusiastic about increasing summer enrollments, which bring more revenue but increase workloads and encroach on time for other summer activities. While the literature does not point to a best way to handle this conundrum, Wasserstein's recommendation—that a person or unit be in charge with a focus on the summer term—is crucial to achieving such success. It goes without saying that this person/unit must be adept at putting out fires and finding win-win solutions to satisfy the competing interests of students, faculty, staff, and university administration.

5. Summer Session Is Part of the Academic Year

Wasserstein makes the point that calendar and fiscal years are 12 months long, but summer session at some institutions has been marginalized so that the academic year is oftentimes thought to consist only of the fall and spring terms. The part of the year known as summer session provides significant opportunities and benefits to institutions. Many students depend on summer session to keep on schedule for graduation, make up missed courses, or lighten academic loads in other terms. Recognized formally or not, summer session has become the de facto third term.

Wasserstein's assertions may ring truer today than they did in 1997. Before then, summer term offices rightfully prided themselves on their relative autonomy from mainstream campus activities and on their entrepreneurial spirit, novel programming, profitability, and financial contributions to the university. Regardless of such achievements, some felt that many summer operations were questionable in terms of their organization, instruction, and administrative support (Schoenfeld & Zillman, 1967). Therefore, they were not worthy of playing a central role within the academic enterprise. Later, Schoenfeld (1985) offered a more positive view but noted that the summer term still operated with continuing issues and challenges. Nonetheless, Wasserstein recognized that the summer term gained strength as an academic enterprise when it became more attuned to the goals of the university.

The summer term plays an important role in student degree attainment and, in turn, serves institutional goals to graduate students on time. Several factors affect graduation rates—selectivity of student applicants; student age at admission; sex and ethnic differences; full-time versus part-time enrollment status; employment status; and, perhaps most importantly, the extent to which a student participates in summer term coursework. The data seem to clearly indicate that a greater number of undergraduate students who take summer courses graduate in 4 and 6 calendar years compared to those who do not take summer courses (Lytle et al., 2016; Lytle et al., 2018). This difference raises two important considerations: (a) summer student participation rates and graduation rates need to be included in the overall institutional calculations to assess the impact of summer term on time-to-degree expectations; and (b) the summer curriculum needs to be integrated and aligned to enhance, complement, and fill gaps in the fall and spring term curricula. For example, offering courses in summer that are oversubscribed in other terms overcomes bottlenecks to students attempting to complete degree requirements in a timely fashion. Hence, the impact of summer term on student graduation rates supports the idea that the summer term should be integrated into the year-round plans of students and their institutions.

Many other kinds of summer term programs are designed to achieve strategic institutional goals. For example, Askeroth et al. (2017) described how Purdue University's strategy to build a year-round university included increasing on-campus summer enrollment. Their Summer Stay Scholars program, based on financial incentives and unique career opportunities in research and summer internships, not only influenced immediate summer enrollment but also increased awareness of on-campus opportunities in the summer and helped build a culture of a year-round campus.

The contribution of the summer term to the financial health of the university is a key factor linking it to institutional missions and goals, but other factors are important in making the connection as well. Over the years, the case has been made that the summer term is academically respectable and therefore central to the academic mission of universities. For example, Martin (1996) claimed the summer term had become a fundamental part of universities and colleges because it primarily served degree-seeking undergraduate and graduate students and, by so doing, had become critical to student retention and degree completion. Alexander (1996) noted that, "summer session, once thought of as a time set apart from the 'academic year,' less rigorous and of slower pace, is currently being heralded by [university] administrators as a term in which regular students can complete graduation requirements in a more timely fashion" (p. 51).

Alexander also recognized that summer term was an incubator for ideas and programs, and was "an entrepreneurial hotbed where significant revenues can be generated to cover diminishing state funding" (p. 51). Similarly, Martin (2003) suggested that the summer term serves as a catalyst for change by providing space for academic experimentation in teaching and learning, and offering unique and experiential-type courses that complement students' academic programs in the fall and winter terms. As well, Martin and, later, Dev (2005) promoted the idea that universities and colleges should capitalize on the revenue-generating potential of summer courses and programs.

In addition to revenue gains from successful summer programming, Dev pointed to its increased value in reputation, recognition, and recruitment potential for universities. The latter idea relates closely to the current university-community engagement initiatives of many universities that "significantly extend the membership of their university communities and do so in ways that add greater colour and richness to their existing teaching and research programmes, as well as providing tangible benefits to their local communities" (Laing, 2016, para. 9). Martin (2003) was of the same mind when he observed that many cultural, performing arts, and community education events connect universities to the community and benefit university-community engagement goals. Also, summer term programs support institutional recruitment efforts by serving the special needs of students, including precollege high school students, students from underrepresented populations, and returning adult students.

Fish and Kowalik (2009) concluded that information on student motivation and enrollment decisions is not only helpful in summer term course development, program building, faculty support, integrative student services, and student recruitment/marketing, but also sets up conversations about how summer term is important to achieve institutional goals. They felt that such data revealed the alignment of the summer term with the mainstream functions of the institution. Similarly, Kline and Leggat (2014) suggested an integrative approach to connect the summer term with primary campus stakeholders. They advocated networking using strategic task forces made up of senior administrative staff and key faculty constituents to share ideas, develop action plans, and monitor outcomes. As reported, the process created institutional buy-in and aligned the summer term with mainstream operations of the university. In their words, "it takes a village—and possibly an entire institution [to make summer term successful]" (p. 2).

Finally, Kops (2016), in an interview with presidents of summer session associations—Association of University Summer Sessions (AUSS), NAASS, North Central Conference on Summer Schools (NCCSS), and Western Association of Summer Session Administrators (WASSA)—about the present state and future directions of the summer term, summarized their perspectives:

> Summer sessions are in a state of flux, moving from their traditional role, as somewhat independent, revenue-generating units that served students who had a particular interest in taking courses during the summer, to a role that is more integrated with year-round operations and involves mainstream issues, including student recruitment and retention, time-to-graduation rates, and new program development. (p. 3)

Taken together, the literature supports the notion that the summer term is key to the central mission of universities and colleges. At a minimum, the literature supports Wasserstein's proposition not to marginalize the summer term but rather value the role it plays in moving universities forward.

Interestingly, the association presidents interviewed by Kops (2016) warned that with more integration of the summer term into a year-round operation, the summer term could be overwhelmed

in ways that might result in the loss of advantages it currently brings to the university. They advised universities and colleges to leverage summer term values, achievements, and successes, but not lose them. In an earlier article, Kobayashi (1996) offered a fuller discussion of moving toward a year-round session, cautioning that it is important to give careful consideration to the unique features of the summer term. He reminded us that the year-round idea—sometimes better known as a trimester system—had been around since the first summer term was developed at the University of Chicago in the late 1800s, but the idea never became popular for a variety of reasons. Over time, even though the summer term continued to operate "outside" of the academic year, fewer operated with the independence they once did. Rather, the summer term is now much more aligned and integrated with the mission and goals of the university. Whatever the particular form and function of the evolving summer term, predictably things will not be as they used to be.

6. Your College or University Should Belong to a National or Regional Organization of Summer Session Administrators

Wasserstein advocated for universities to be members of a summer session association. At the time there were four member-benefit associations—two were regional (NCCSS and WASSA), and two were national (NAASS and AUSS). In addition to member services, Wasserstein emphasized the importance of the wealth of ideas and contacts that arise from meeting with colleagues from other universities and colleges.

Wasserstein observed that the prime benefits of joining one or more of the summer session associations were the networking opportunities and the development of collegial relationships, along with the services and resources gained from membership.

However, changes over the intervening 24 years have affected the structure and viability of the four organizations. Most notably, the two regional associations (NCCSS and WASSA) merged with NAASS under a single operational structure. While this change may be considered evolutionary, resulting from changes in the way universities and colleges operate and changes in external factors, it tends to lose the advantages of decentralized/regional organizations (see Coggburn, 2005; Fleurke & Hulst, 2006; Goddard & Mannion, 2006; Ho, 2006; Hutchcroft, 2001; Iwe, 2006; Rickards, 2007). Large centralized associations can be more efficient, but regional associations are more familiar with the peculiarities of member institutions, can better serve their needs and wants, and more easily allow meaningful connections and relationships to form. Time will tell whether the new association structures will continue to benefit the summer term as suggested by Wasserstein.

North Central Conference on Summer Schools (NCCSS)

NCCSS, formally established in 1950, offered membership to any 4-year university or college in the 19 states in the north-central region of the US and Manitoba in Canada. NCCSS had a tradition of

establishing and maintaining summer session standards. Between its founding and the time of its merger with NAASS in 2017, membership fluctuated between 51 and 141 member institutions.

Western Association of Summer Session Administrators (WASSA)

WASSA, following its formal establishment in 1950, offered membership to any accredited 4-year universities or colleges in the 13 Rocky Mountain and West Coast states, three western Canadian provinces, and Mexico. WASSA prided itself on being open, sharing ideas, and helping its members deal with institution-specific problems and concerns. Membership fluctuated from a high of 95 in 1978 to a low of 26 institutions in 2017 when WASSA decided to merge with NAASS.

Membership decline in NCCSS and WASSA appeared to result from several factors, including the decentralization of many summer term operations, the advent of state-funded summer terms in California and other states, and budget-related travel restrictions limiting conference attendance.

Association of University Summer Sessions (AUSS)

Organized for the purpose of facilitating discussions around issues and problems facing summer session administrators, AUSS held its first meeting in November 1917, making it the first of the summer session professional associations formed. AUSS is unique because it restricts membership by invitation only. Its initial 40-member cap was expanded to 50 institutions in 1964.

North American Association of Summer Sessions (NAASS)

Governed by a volunteer administrative council, regional representatives, and committees, NAASS is a nonprofit association of higher education administrators throughout the United States, Canada, and Mexico that focuses on summer and special sessions. NAASS was formed in 1964, to create a national association to share information on summer session programs. NAASS membership began with 179 institutions and grew steadily to just over 450 colleges and university members by the mid-1990s, but now includes fewer than 160 institutions.

Despite a decline in membership, NAASS remains the primary open-membership summer session association and has strengthened its regional presence with the 2017 mergers with NCCSS and WASSA. In 2016, NAASS surveyed members who expressed satisfaction with the association but also pointed to challenges of sustaining and growing membership, offering timely professional development programs, and creating data-driven reports on student enrollment trends and forecasts.

The summer session associations have collaborated to create three important resources: the Theresa Neil Memorial Research Award, the *Joint Statistical Report*, and *Summer Academe: A Journal of Higher Education.*

The Theresa Neil Memorial Research Award, first established as the Summer Session Research Consortium Award in 1974, was created to foster research addressing pedagogical or

administrative issues pertinent to the summer term at North American colleges and universities. To date, over $185,000 has been awarded to selected projects, many of which have been published in peer-reviewed journals and/or presented at conferences; some have been cited in this paper.

The *Joint Statistical Report*, first published in 1978, provides comparative data on the summer term that can be useful for benchmarking, evaluating and improving summer programming, and advancing the role of the summer term at universities and colleges. An updated version of the report was reintroduced in 2013 after a 5-year period of inactivity. As an example, Smith and Byrd (2015) provided a summary and explanation of findings from the 2014 report.

Summer Academe: A Journal of Higher Education has been published since 1996. It is a source of current research and best practices in summer session administration and pedagogy. Only one volume had been published when Wasserstein presented his paper at the NAASS conference in 1997; since then, 12 additional volumes have been produced, containing over 70 articles. After a break of 4 years, the journal was rebooted in 2013 as an open source, online journal with a new format that gave voice not only to articles on research and scholarship but also to conference presentations, opinions/viewpoints on current topics, and book and media reviews.

Wasserstein's recommendation that universities and colleges offering summer programs should belong to a summer session professional association remains valid today. While it is no longer possible to join a stand-alone regional association, the benefits can be gained through NAASS. The services, resources, professional development events, and networking opportunities are more accessible than ever before with potential benefits at many levels: to individual staff, overall to the unit, and to the broader academic enterprise of the university (Atkinson, 2012). At the same time, NAASS does not operate without challenges, including questions of structure and management. Regardless, NAASS is a member-benefit association seeking to create value for members, and membership growth and retention (Balthazard, 2017). One lingering question hanging over NAASS (and possibly AUSS) going forward is whether there will be a sufficient critical mass of centralized summer terms headed by directors and deans to sustain the associations' future.

Conclusion

Most of Wasserstein's suggestions for college and university presidents and chief administrative officers have been supported in the literature, making his advice as meaningful today as it was when he first presented his ideas in 1997. While much has remained valid over the intervening 24 years since Wasserstein first presented his paper, some newer trends are worth noting:

- closer alignment of the summer term with the academic year and mainstream operations of universities
- increase in courses taught online and in virtual formats

- fewer positions as head of summer term held by academic faculty
- decline in membership in summer session associations

What such trends mean to the form and function of the summer term going forward remains to be seen. In the meantime, we return your attention to advice offered by Wasserstein, and now others, on these key questions: Who are the students we serve; what are their wants/needs; and how can we best meet them? How can we recruit and engage high-performing faculty to teach? How do we ensure the summer term is relevant to the mission and goals of the university? How do we sustain the viability and success of the summer term going forward?

Our parting advice is largely based on a shared belief that practice-based (applied) research is perhaps the single most important tool to help summer term offices maximize benefits to students, faculty, and the university. We recommend consideration of the following:

- Determine the information and data important to the summer term, identify the source, and gain access to the data/information.
- Master the basics of the Integrated Postsecondary Education Data System in order to learn about institutional student demographics, graduation rates, and available student financial support.
- Collect summer term student demographic data, survey students (and faculty) about academic needs and wants, and analyze student enrollment patterns.
- Conduct SWOT (strengths, weaknesses, opportunities, threats) types of analyses to better understand the summer term, the environment within which it operates, the opportunities and challenges it faces, and the tools and resources available.
- Understand the institution's mission and goals, then align summer term academic programs with them.
- Consult with your NAASS/AUSS colleagues to vet ideas, benefit from sage advice, and learn from experts; and read *Summer Academe* to gain insights into research findings and best practices.

Further Research

As is evident from reading this paper, the availability of literature is not consistent across sections—ranging from an abundance on topics like teaching in summer compressed formats, to limited on the impact of summer term specialized and travel-study programs. Areas where there is a paucity of literature suggests opportunities for further research, such as questions related to the effectiveness of revenue-sharing models on participation in the summer term, incentives that best engage faculty to teach, and ways to measure effectiveness of marketing strategies to attract students to attend the summer term. Whatever is an area of interest, we encourage summer term administrators and faculty to engage in research to answer questions and fill these research gaps. Keep in mind funding

support is available through the Theresa Neil Memorial Research Award; applications are accepted annually. Also, researchers are encouraged to present their work at annual NAASS conferences, and to submit their research results for publication in *Summer Academe*.

Addendum: COVID-19 Pandemic Impacts on the Summer Term

Wasserstein could have never imagined the COVID-19 pandemic and its current and, most likely, future consequences for the summer term. The COVID-19 pandemic is impacting universities and colleges on multiple fronts, and has already caused significant widespread changes in post-secondary institutional operations and finances that could threaten the survival of some colleges and universities (DePietro, 2020; ICEF Monitor, 2020; Times Higher Education, 2020). Some of the impact has changed the very nature of teaching and learning, beginning in the spring and spilling over into the summer and fall terms in 2020. The majority of courses have shifted to being taught online, in blended formats, or by socially distanced, face-to-face delivery. There are no or fewer students and faculty allowed on campuses; fewer international students have been admitted; no or fewer study-abroad, experiential, or internship courses; and no precollege high school or transition programs in the summer term (unpublished results from a COVID-19 survey done by NAASS in 2020). All of these immediate effects have consequences for the financial well-being of universities and colleges, including the summer term.

In our view the challenges arising from the COVID-19 pandemic will have both immediate and long-term impacts on the summer term. Overall, the changes will likely push the pace and pressure to have the summer term align more fully with the rest of the academic year. The biggest and most immediate changes affect course formats, modes of delivery, and class structure and size because courses have migrated to being taught online. The proliferation of online courses could see summer term courses, traditionally taught in compressed time frames, being taught over the same number of weeks as in other terms, because online courses are designed to "standard" term lengths. Further, in programs where students have the option to choose when to start and finish courses, term length becomes even less relevant. As a consequence, one of the prime distinguishing characteristics of the summer term—compressed course formats—could disappear. As well, other aspects of instruction could change dramatically. Regardless of term length, face-to-face courses taught in the immediate future will require more classroom time and space to meet social distancing directives. The result could be courses taught over the full academic year that includes the summer term, to accommodate student demand. Such changes are pushing the summer term to be a comparable third term in a 12-month academic year, something Wasserstein posited, albeit for different reasons.

It is still too early to tell how the pandemic will affect summer enrollments and student diversity, but thus far it appears that racial and ethnic minority groups are at increased risk of getting sick and dying from COVID-19 (Stokes et al., 2020). Early indications are that 2020 fall term undergraduate student enrollments declined 2.5% overall from the prior year, with private institutions showing larger declines (3.8%) compared to publicly funded colleges and universities (0.4%) (June, 2020). There is little reason to believe that the impact of the virus on the summer term will be much different from the other terms. One factor to consider is that students motivated to enroll in summer courses because of their preferences for smaller class sizes or closer student-faculty contact may be dissuaded as courses are only taught online.

Another distinguishing feature of the summer term is precollege, freshman, transfer, and international student transition programs and other special programs. With no or fewer students coming to campus, the role of the summer term in delivering such face-to-face programming will disappear, and universities and colleges may incorporate these recruitment and orientation efforts into institution-wide initiatives offered in one or more of the other terms. In addition, with increased access created by online course delivery, universities and colleges may look to recruit students farther afield to create sufficient demand in all academic terms. This could lead to centralization of all marketing and communication functions, including those activities related to the summer term. With budgets impacted by the pandemic, universities and colleges will be eager to maximize revenue and control costs. Expectedly, this would be done most efficiently by centralizing financial functions, which would see summer term budgets and finances managed centrally.

At this point it is difficult to predict the full and extended impact of COVID-19 on the summer term, but changes are underway that may not be easily reversed when the pandemic dissipates. Ken Burrows (2013) may have captured these sentiments best when he looked back at the 2008 recession and said the following about the changing role of the summer term:

> Now, in the midst of recession with business-as-usual in doubt and the near certainty that only the deluded and complacent believe that things will go back comfortably to what they were, I think the need for leadership in and by summer sessions, and therefore by NAASS, has never been clearer and the opportunity never greater. (p. 2)

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Biographies

Loy Lytle is professor emeritus in the Department of Psychological and Brain Sciences and dean emeritus of Extended Learning Services and Summer Sessions at the University of California, Santa Barbara. He is a past president of the North American Association of Summer Sessions and the Western Association of Summer Session Administrators, and the recipient of NAASS's Honorary Life Member Award and past recipient of two Theresa Neil Memorial Research Awards. Although retired from his administrative duties, he still conducts research, consults, presents, and writes on issues related to summer session administration, data collection and analysis, and program development.

William Kops is a professor in Extended Education and the former director of Summer Session and General Studies at the University of Manitoba. He is a past president of the North American Association of Summer Sessions and the Association of University Summer Sessions, and the recipient of NAASS's Distinguished Service and Honorary Life Member Awards and the past recipient of three Theresa Neil Memorial Research Awards. He teaches courses in adult and continuing education, and his research interests are in issues related to higher education administration, continuing education for older adults, and self-directed learning.

Appendix A

What Every President and Every Chief Academic Officer Should Know About College and University Summer Sessions was authored by Ronald L. Wasserstein almost a quarter century ago, based on the presentation *What Every President and Chief Academic Officer Should Know About Summer School* at the 1997 North American Association of Summer Sessions annual conference in Berkeley, California. Although never published in a peer-reviewed journal, the paper was posted on various websites (e.g., North Central Conference on Summer School and Washburn University), with the numerical data from Washburn University updated in 2001 and 2005. We include the 1997 version as Appendix A.

Please note: The original paper (replicated on the following pages) contained links that are no longer active.

What Every President and Every Chief Academic Officer Should Know About College and University Summer Sessions

prepared by Ronald L. Wasserstein,
Associate Vice President for Academic Affairs, Washburn University

Information about Summer Session at *Washburn University*
provided by *Ron Wasserstein*

Last update: November 10, 1997

This document was designed to be freely downloaded and used by colleges and universities to assist their chief executive and academic officers in understanding the nature of academic summer sessions. Each institution using this document will need to update the *italicized* portions of this document with pertinent information from the institution.

Summer Session is a vital enterprise at your college or university. In this electronic document, we hope to provide you in a convenient format information to make you more aware of this enterprise and its importance to your campus. We know that, in your line of work, you have great demands on your time, so we've tried to be brief.

As the title suggests, this document is addressed to you as the President or as the Chief Academic Officer of your institution. The author is the director of a university summer session, and was helped in the preparation of the document by many summer session administrators from across the country. If you have comments or suggestions about this document, please click on the author's name and send an email message.

The variety of types of summer sessions, and the issues concerning them, is as rich as the variety of institutions of higher education in the U.S. In this brief document, we provide a broad view of summer sessions. We will discuss how summer session benefits students, faculty, and the institution; indicate how summer sessions are organized administratively; and provide some links to web sites which offer additional details about summer sessions across North America.

Unless otherwise indicated, data used in this document are from the "1996 Summer Sessions Associations' Joint Statistical Report," prepared at the University of Portland by Dr. Lee Golden. (The data in the statistical report are based on responses from participating institutions: however, the institutions that respond to the survey tend to be most active in the development of summer sessions. A complete list of participating institutions is included in the report.)

1. Someone has to be in charge

Summer sessions are organized in numerous different ways, and no one model is universally agreed to be superior. Some institutions have highly centralized models, where decisions regarding summer programs and budget are made by one individual. Others have more decentralized models, with a summer session officer who delegates certain program responsibilities and/or allocates program funds to deans or department chairs. Some institutions are highly decentralized, with each academic unit given a budget and accepting responsibility for programs. Every point along this spectrum seems to be occupied. Campuses also have their own unique climates and cultures as well.

The common factor found among successful summer programs however, is that someone (we'll call that person the "summer session director") ultimately has clear responsibility for the summer session, and has been given the authority and the budget needed to carry out this responsibility within the structural model of the institution. The principle is that "when everyone is in charge, no one is in charge." The summer session experience at many different kinds of institutions bears witness to this principle. A few phone calls to your colleagues at other institutions will no doubt confirm it as well.

Perhaps the main reason why this is so is that there are many competing interests involved. Students have needs and desires regarding the summer session, but so do faculty and administration. These competing needs can often be reconciled in a very beneficial way, but this will not happen on its own. Summer session brings benefits to all groups, however, as will be discussed below.

There are many reporting models for summer session directors. Most commonly, summer session directors report to the chief academic officer (or to someone reporting to the CAO) or to a dean of continuing education (and/or extension, special instructional programs, or other names). The "right place" for a summer session director depends on the institution, of course. However, in order to be able to exercise the authority described above, the summer session director should report to a senior administrative official.

> The summer session director at *Washburn University is Ron Wasserstein. He* reports to the *Vice President for Academic Affairs*.

Typically, the summer session director is charged with a specific fiscal obligation that must be met through summer tuition and fees. That obligation might be to cover a certain percentage of instructional costs. At some institutions, an overhead assessment is added to the obligation and at others, costs of the summer session office are part of this obligation. The following table

shows the fiscal obligations assigned at 198 public and private institutions participating in the 1996 Joint Summer Session Associations survey:

Less than 100% of instructional costs	100% of instructional costs only	100% of instructional costs plus an overhead factor	100% of instructional costs, plus year-round cost of summer session office	100% of instructional costs, cost of summer session office, plus an overhead factor
9.1%	7.1%	24.8%	10.1%	49.0%

Naturally, such choices depend on the fiscal structure and the tuition and fee structure of the institution. However, at most institutions, summer sessions can be expected to cover costs and to make some contribution toward the overall operation of the institution.

> *Summer Session at Washburn is expected to cover 100% of instructional costs plus an overhead factor of 37% of instructional cost.*

2. Summer Session should be designed for students

Students are and must be at the heart of college and university summer sessions. If this is not the case at your institution, you may want to consider exercising your influence to bring about this perspective. Three questions, asked in this order, should drive the planning of the summer session:

- What courses/programs do students need or want?
- What times or instructional formats meet student needs?
- What faculty are available to teach these courses?

What courses/programs do students need or want?

While students vary from institution to institution, the research and experience of many summer session directors in a variety of settings shows that the majority of students who take summer session courses do so for one or more of the following reasons:

- to enable themselves to graduate on time, or at least to shorten the time to graduation

- to lighten the course load required in other terms
- to concentrate on some area of study that needs full-time attention
- to take courses that can't be offered at other times during the year
- to take courses that they could not get into during other terms
- to be in smaller classes
- to overcome academic difficulties/deficiencies
- to get a "jump start" in a new environment (for freshmen or transfer students)

Students choose particular courses in the summer session for many of the same reasons they choose courses in the fall and spring: to meet general education requirements, satisfy prerequisites, fulfill major or correlate requirements, to take electives, to improve job-related skills or employability, or for personal enrichment. Understanding which of .these are most important to various groups of students at your institution is an important part of summer course planning.

Thus, the summer session schedule can be likened to an investment portfolio. A diversified selection of courses is required to meet these varied needs.

At the same time, the summer student body is often dissimilar from the academic year student body. At many institutions, summer session serves a substantial number of "visiting" students, in addition to its own regular students. Such students may attend your institution because they are home for the summer, perhaps while working at home. Perhaps, as in the case of public school teachers, they are only free to take classes during the summer. They may have come to take a particular course or set of courses at your campus that they cannot get at their home institution. Whatever the reason, such students provide a real revenue bonus for your institution, since they would not be attending otherwise.

> *12–18%* of students enrolling in Summer Session courses at *Washburn University* are visiting from other higher education institutions.

It is important to remember that, for most students, summer session is an optional attendance period. Therefore, it is important to put some effort into marketing the summer session. Your own students must be sold on the benefits of giving up some of the freedom of summer to take classes. Visiting students will need to be convinced that their needs can be met on your campus. You can expect that your institution's investment in promotional materials, such as the class schedule, will be somewhat larger on a per unit basis than in the fall and spring. Your institution may very well use a variety of other advertising methods to communicate

to students the benefits of your program. Typically, these activities will be separate from the usual recruitment programs of the institution.

What times or instructional formats meet student needs?

Summer Session is by its nature compressed relative to the fall and spring terms. Typical academic calendars for schools on a semester system allow 15-16 weeks for fall and spring terms. Starting in early June and ending in mid-August leaves only about 10 weeks for summer session, though some schools manage to squeeze 12 weeks in by starting sooner and/or ending later. Whatever the time allotted, summer session often consists of a mixture of course lengths. For instance, there may be an eight-week summer session, with a couple of five-week sessions overlapping it. There may be back-to-back five or six week sessions. Some larger institutions have more than 30 different summer 'sessions" going on at the same time. The trend over the past 20 years seems to be toward shorter sessions, and this trend appears to be driven by student preferences.

The table below shows the length of the term having the most enrollment (by student credit hour) among 208 public and private institutions surveyed for Summer 1996:

Length of term	**2 weeks**	**3 weeks**	**4 weeks**	**5 weeks**	**6 weeks**	**7 weeks**	**8 weeks**	**9 or more weeks**	**other**
Number of schools	0	6	13	69	70	10	34	4	2
Percent of total	0.0%	2.9%	6.3%	33.2%	33.7%	4.8%	16.7%	1.9%	1.0%

Shorter terms are often popular with students and faculty because they help to overcome one of the frequently reported hindrances to summer session enrollment, the need for a break in the summer. Students can devote 5 weeks to pursuing course work and still have some time off before the next term begins.

Some disciplines (for example, mathematics and some of the natural sciences) do not lend themselves as well to shorter terms.

> Summer Session at *Washburn University* consists of *two five-week sessions with an overlapping eight-week session. Numerous short-term courses are also offered.*

What faculty are available to teach these courses?

With good communication and careful planning, summer session can and should benefit students and faculty alike. Benefits to faculty are discussed in the next section. Certainly the choice of courses to be offered depends on the availability of qualified faculty to teach them. However, summer session course offerings should not be planned primarily on whose "turn" it is to teach. Departmental planning for summer session sometimes takes on the following form: the department chair asks who wants to teach, and then asks those who want to teach what they would like to teach. While this may serendipitously result in a schedule that meets student needs, it is not as likely to do so.

3. Summer Session should benefit faculty

> *Over 130 regular and adjunct faculty taught courses at Washburn University during Summer Session 1997.*

Summer session offers at least two fundamental opportunities for faculty:

- The opportunity to innovate and develop new or improved courses through experimentation in summer when classes might be smaller and other distractions might be fewer..
- The opportunity to earn extra income.

To a certain extent, summer session can at the same time meet student needs and serve as a laboratory for curricular innovation. With the smaller class sizes and longer class periods that often characterize summer courses, instructors can attempt to incorporate new technologies and methodologies. In addition, courses involving certain kinds of field work are often ideally suited for the summer. Even courses that are offered in the other academic terms can be given a different look by including some activities that work well in a summer setting.

Summer session can also offer opportunities for faculty to teach different clientele. Many institutions have offered summer programs for gifted high school students, or intensive workshops for professionals. Teaching these unique groups of students can be great fun, and is a form of faculty development.

To the degree possible within other constraints, then, faculty should be given the opportunity to think creatively about the summer session.

Faculty also appreciate some of the same aspects of summer session that students like. Students are taking fewer courses and can give each more attention. There are usually fewer

students so faculty can give them more individual attention. Courses meet more often and for longer periods, providing better continuity of subject matter. Facilities are more accessible, the atmosphere more relaxed. And parking is more plentiful!

At some institutions, particularly research-oriented colleges and universities, enticing faculty to teach at all in the summer is difficult to do. Most institutions, however, find that the opportunity to supplement salaries makes summer teaching an attractive option for faculty. The attractiveness of the option will depend on the rate of pay and related compensation issues, however, and there is great variety among institutions in this regard. Key factors are:

- Basis for computing the summer salary. Frequently used methods include: a fixed percent of regular 9-month salary per credit hour or per course taught, a flat amount per credit hour or per course taught, and a flat amount based on academic rank per credit hour or course taught.
- Type of summer contract; that is, guaranteed contracts vs. contract contingent upon enrollment.
- Existence of a per-course cap on summer earnings.
- Payment for supervision of independent studies or direction of theses.
- Extension of benefit package to summer salary. (For example, if the institution contributes a percentage of regular salary to a retirement plan, is the same percentage contribution made for summer salary?)

Of course, faculty represented by a collective bargaining unit will usually have these factors spelled out by contract. On every campus, finding an equitable balance of these factors to make summer teaching attractive while still remaining affordable to the institution requires considerable effort on the part of the summer session director, the administration, and the faculty. Here is the status of these factors at your institution:

Compensation factor	**Status at *Washburn University***
Basis for computing salary	*Three and one-third percent of 9-month salary per credit hour*
Type of summer contract	*contingent upon enrollment*
Salary cap?	*none*
Faculty paid for ind. study or thesis supervision?	*no*
Benefit package applied to summer salary?	*no*

Where it is difficult to find faculty willing to teach in the summer, many institutions provide opportunities for visiting faculty from other institutions, graduate students and or adjunct faculty during the summer.

4. Summer Session should benefit the institution

Perhaps the most fundamental thing you should know about the summer session is its importance to the university as a whole. The benefits of summer session to students and faculty were discussed above. But consider also the following:

- Most summer sessions make money for the institution, as mentioned in part 1 of this document. Net revenues from summer are used to meet other institutional needs. Other fiscal benefits accrue to student housing, the bookstore, food service, etc. Buildings and grounds do not stand empty for three months but are used more efficiently.
- Summer sessions provide opportunities to students, staff, and faculty that would otherwise not be available to them. For example, new programs are much easier to try in the summer. New courses can be offered on a trial basis. Staff and members of the community can utilize summer offerings for personal development. In general, summer session is more flexible. There is much greater autonomy and liberty in the summer than during the rigid, usually conservative, fall and spring terms, and hence the summer provides an essential dimension to an institution of higher learning.
- Many of your students depend on summer session to meet specific academic needs or to keep their programs on track. Surveys at some institutions have found that as many as 75-80% of their graduates attended at least one summer session during their academic careers.
- Many academic departments depend on summer session to handle excess load in certain courses.
- Summer session increases the visibility of the institution. Summer programs which reach out to high school students or others special populations can provide positive public relations for the institution, and can serve as a recruiting tool as well. People who might not otherwise ever be a part of the institution form a connection.

If you haven't already received one, be sure to ask your summer session director for a copy of the summer session policy handbook or planning guide at your institution. Such a document should provide you with a good indication of how summer session is contributing to the life of your college or university.

Here are a few of the ways Summer Session 1997 benefitted Washburn University:
A total 2,501 students generated 11,377 credit hours (both figures up 5% from 1996)
Net revenue generated exceeded the budgetary goal by 20%
Virtually all graduate programs depend on summer session to help keep their part-time students on schedule to graduate
Previous studies have shown than nearly 80% of graduates enrolled in at least one summer session course

5. Summer Session IS part of the "academic year"

Unfortunately, the term "academic year" is often used to refer to the fall and spring semesters. Calendar years and fiscal years are 12 months long, and so are academic years. Colleges and universities operate year round, and the portion of the year known as "summer session" provides significant opportunities and benefits to the institution. Many students depend on summer session to keep on schedule for graduation or to take lighter loads in other semesters. For these students, summer truly is a third semester. The institution should guard against marginalizing this important part of the academic year.

6. Your college or university should belong to a national or regional organization of summer session administrators

There are two regional organizations and two national organizations of summer session administrators. These organizations provide a variety of services to their memberships, including annual conferences, newsletters and home pages. In addition, these organizations work together to provide two major publications, the annual "Summer Sessions Association Joint Statistical Report" and "Summer Academe," a refereed journal emphasizing scholarship relating to college and university summer sessions. Most important for your institution and your summer session director, however, is the wealth of ideas and contacts that arise from meeting with counterparts from other schools. Annual dues to these organizations are low, making them a real bargain. The four national and regional summer session organizations are:

- North Central Conference on Summer Schools (NCCSS)
- North American Association of Summer Sessions (NAASS)
- Western Association of Summer Sessions Administrators (WASSA)
- Association of University Summer Sessions (membership in AUSS is by invitation)

Washburn University is a member of NCCSS and of NAASS.

Another valuable resource is "Summer Academe," a journal devoted to scholarly articles pertaining to summer sessions. To subscribe, contact the publisher, Caddo Gap Press, 317 South Division St. Ann Arbor, MI. 48104.

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Go to North Carolina Conference on Summer Schools (NCCSS) home page.