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FROM: Carol Kulik, U. of South Australia
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CC: DIGR Committee Members:
Jackie Coyle-Shapiro, London School of Economics (BOG Vice-President and Program Chair)
Alain Fayolle, E. M. Lyon (Past Division Chair, ENT)
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Carrie Leana, U. of Pittsburgh (BOG Representative at Large)
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DATE: May 18, 2018

RE: SAP 5-year Review Report & Request for Division Status

Thank you for the detailed report regarding your 5-year review as an Interest Group and your request for Division status. The Division and Interest Group Relations (DIGR) Committee of the Academy of Management (AOM) appreciated your thoughtful review of extant SAP scholarship as well as the concise and valuable summary in the tables and figures, the comprehensiveness and structuring of the report, and the report's forward looking nature. Also impressive is the fact that the SAP community at large was involved in the application process for divisional status.

As part of the review process, the Board solicited input from other DIGs about SAP's potential move from Interest Group to Division. DIGR reviewed the full body of material and provided a thorough report to the AOM Board. **On April 28, 2018, the AOM Board of Governors voted to renew SAP as an Interest Group for five years but not to convert it to a Division at this time.**

In making its decision, the Board reflected on AOM's purposes in establishing Interest Groups and Divisions, and its criteria for differentiating between Interest Groups and Divisions. AOM's policy documents highlight two sets of criteria in relation to the Interest Group-Division transition. One set of criteria relates to the Interest Group's internal activities (e.g., governance, membership satisfaction and trends, meeting activities and membership services). The Board recognizes and appreciates SAP's strong performance on these dimensions over the last five years. SAP has created a vibrant community with high member engagement; SAP knows its membership and is actively delivering services to meet member needs.

The second set of criteria relates to the Interest Group's scholarly domain, and the positioning of that domain within the AOM portfolio. Interest Groups are organized around emerging trends; they

demonstrate a distinct body of scholarship that is not otherwise adequately represented within AOM's DIGs. Divisions are organized around an established body of scholarship evidenced by an independent scholarship record; a Division should deliver a unique intellectual contribution not represented by other DIGs. As a result of these differential definitions, Interest Group domains can display fuzzier boundaries than domains associated with Divisions. The Board's concern centered on the clarity and uniqueness of SAP's research domain. This concern – that SAP's domain is not sufficiently delineated to meet the definition of Division status – surfaced in Board discussions and in some of the feedback from other DIGs. It suggests that the boundaries around SAP's domain are not sufficiently visible to AOM stakeholder groups who are both close to, and more distant from, that domain.

We recognize that the Board's decision regarding Division status is disappointing, and we assure you that the decision was not made lightly. This decision does not speak to the Board's position on SAP's ability to move to Division status at some future point. It simply acknowledges that, at this moment, the Board does not see SAP as ready for the move. We want to emphasize that we appreciate all the contributions SAP's leadership and membership continue to make to the Academy. It takes time for emerging scientific trends to consolidate into established bodies of knowledge, and therefore it is not unusual for groups developing new scholarly areas to wait longer than they might have preferred to assure stakeholders of their establishment as a well-defined scholarly discipline. As a prime example, ENT remained an interest group for about 15 years before becoming a Division; ENT is now one of the largest and fastest growing Divisions of AOM.

Immediately below is a summary of DIGR Committee comments concerning the review criteria for an Interest Group attaining Divisional status. Later in the report, we deliver a set of comments from the DIGR Committee related to the 5-year review. DIGR committee members were asked to identify what they see as strengths, challenges or concerns in going forward as well as efforts underway that lessen these concerns. Taking these into consideration, we offer recommendations for the Interest Group. We hope that you will be able to use this feedback to provide valuable services to your members. As you continue to develop your strategic vision for SAP's future, we encourage you to keep AOM's "moonshot" goals for 2022 in mind; the moonshots are listed at the end of this report.

Feedback on Request for Division Status

Strengths

The SAP Interest Group (IG) provides several benefits to AOM. SAP authors represent an international group of scholars, as shown in Figure 1.3, which contributes to AOM's vision of being the premier academic professional association in management globally. SAP members based outside the U.S. constitute 64% of the IG's total membership (465 of 724). SAP shows consistent growth over time in both U.S. and nonU.S. members that is higher than the average annual growth shown by AOM overall.

SAP scholarship leverages novel, innovative theoretical and methodological approaches that are currently under-represented in AOM, which also contributes to AOM's inclusiveness and ability to attract a more diverse set of management scholars. SAP has a significant number of executive members (83 in 2017), which has increased by 11% over the last 5 years during which time executive membership in the AOM overall has dropped by 17%. This distinctive trend indicates SAP's ability to attract a greater variety of members to the AOM.



SAP's members tend to be young and early career, potentially indicating the growing importance of this area of scholarship to the field (e.g., 194 dissertation theses; 29% of members aged 30-39; 8% growth in student members compared to 4.17% for AOM overall).

Supporting its value within the AOM, SAP creates an "AOM home" for 82% of its members, members are highly satisfied with SAP's AOM program and events, and 80% of members support the move to Division status. In summary, SAP is a vibrant IG in a young, growing area which is particularly effective at attracting international and executive members to the AOM.

Concerns

The key area of concern is whether SAP's domain is sufficiently delineated to be considered independent from that of other existing Divisions.

The intellectual space explored in SAP focuses on the day-to-day work, activities, and practices of strategies; it intends to expand the phenomenon of strategy by theorizing strategy as something people do (Page 7 of the SAP report). SAP's work focuses on a broad set of organizational actors doing strategy work, so it encompasses middle managers and frontline workers as well as senior leaders. As a result, SAP sits within a space that intersects and interconnects with other AOM communities (e.g., scholars in the STR, OMT, and CMS areas). However, this positioning means that some of SAP's most distinctive features lie in its methodologies and epistemologies, rather than its substantive content. For some stakeholders, it is unclear how SAP's emphasis on strategy as "something people do" differs from STR's focus on "strategic processes" including "strategic formulation, implementation and planning."

SAP's report demonstrates that there is a great deal of scholarly activity in its domain (472 publications; Table 1.1). Review articles have summarized and defined the field of SAP, and 12 special issues of journals have focused on the SAP domain. This work is being published in several top-tier outlets, primarily *Organization Studies*, *Journal of Management Studies*, and the *Strategic Management Journal*. Social practice theory itself, as a non-unified theoretical perspective, is likely to provide fertile ground for further theoretical development. SAP's report also indicates an upward trajectory of citations, indicating impact on the management field that is increasing over time (Figure 1.2). However, it is unclear what form this impact will take over the long run. The evidence suggests that SAP is now a recognized (albeit potentially still under-represented) component of strategic management. As SAP researchers continue to push the boundaries associated with traditional strategy research, the overlap between SAP's domain and the broader domain of strategy might grow rather than diminish.

Feedback on 5-year Interest Group Review Report

Strengths

The 5-year review shows some strong aspects of the SAP IG. There is evidence that SAP scholarship is on the ascendancy in terms of citations and publications in top-tier journals. The SAP IG is a growing group that is technologically savvy in terms of communicating with members and publicizing its work and those of members. The outside sponsorship received in 2017 is commendable. There was a 32% response rate to the member survey, which is above the 27% average for Divisions and Interest Groups completing reviews this cycle. SAP also shows strong and growing participation at the elections with the highest % of voting in 2017 (27% as to 23% for AOM).



There is high identification with SAP amongst the 680/724 members with 70% identifying with SAP as their primary DIG (presumably out of 206 respondents). This statistic indicates the importance of the IG as an AOM "home" for many of its members, roughly 64% of whom reside outside the United States. Given the AOM's aspiration to be the premier academic professional association in the field of management and its ongoing challenge in building a truly global membership base, the success of the SAP IG in attracting international members is one of the ways the IG adds value to the AOM as a whole.

SAP membership is growing more quickly than the AOM and the IG shows a strong capacity to attract international and executive members in ways that contribute positively to the AOM.

Member satisfaction is about 87%, which is very high and commendable. Additional strengths include:

- An internationally represented leadership track
- The members of the IG are satisfied with what the IG offers them and the executives are viewed as good stewards of the IG's mission
- High levels of satisfaction are demonstrated in member responses to questions about governance and leadership. For instance, members showed very high levels of satisfaction with their SAP membership and officers' responsiveness to members' concerns. They also gave high scores to questions about a) Ability of interested members to become leaders; b) Opportunities to influence the IG; and c) Fair and open elections
- Clear member benefits in terms of belonging to SAP
- Strong, ongoing efforts to connect with members
- Strong emphasis on serving PhD students and early career researchers, such as the one-day Doctoral and Early Career Programme which received very high ratings from the participants in both 2016 and 2017
- The written feedback for papers (from 2015) session participants. Chair and authors provide written comments to each other
- Integrated online communication
- Satisfaction with the SAP program at the annual meeting has risen from 2012 to 2017
- Incorporation of feedback to improve special events at the Annual meeting
- Collaborations with other DIGs such as themed breakfasts
- A number of forward-looking goals outlined: improving the experience of diverse members and developing greater support mechanisms for doctoral students and early career scholars; quick integration of new members; ongoing community building outside the annual meeting and recognition

Challenges/Concerns

Several challenges and/or concerns were noted by members of the DIGR Committee; some of these were also noted in the SAP IG report. They are:

- Continued need to articulate a domain that is distinctive from that of STR and other DIGs in a way that is understandable for AOM members outside of SAP and its related Divisions
- Collaboration with other divisions (pages 50-51) show substantial overlap with STR, and the point of difference of SAP seems to revolve primarily around methodology
- Insufficient evidence of dialogue with OMT and STR about how its joint members and the two divisions would like to see SAP evolve so that everyone is enriched by its growth
- It was not clear from the current report whether their EC had implemented a midyear meeting as recommended in the prior review



- Did SAP experiment with crossDIG liaisons as recommended in the prior report? If so, what activities were undertaken/are currently being undertaken?
- SAP shows relatively low levels of engagement for all aspects of the annual meeting: registrants, participation and reviewer rates are below those of AOM as a whole
- Declining paper submissions since 2015 and variable symposia submissions
- A high percentage of members have never volunteered (63%), and the responses to Q13 in the member survey also indicate low engagement with AOM
- Lack of participation of U.S. members in leadership positions
- Low level of sponsorship, based on the AOM metrics, with \$0 in 2015 (lowest) and \$6,400 in 2016 (highest). In 2017, from the IG report, the sponsorship is estimated at \$18,195. What is forecast for 2018? A full list of sponsors over the period would be useful.
- Financial stewardship: There was a negative balance forward at the end of 2016 with negative operating funds of \$113.08 and little information about sponsorship planning going forward; this year's sponsorship efforts seem strong, is it sustainable?
- Little information regarding how the outlined goals outlined will be reached. The information around the goals is not future oriented but what SAP has done/is doing

Somewhat lessening these concerns, the report demonstrates awareness and action planning in relation to key issues. Also somewhat lessening these concerns are the following:

- Implemented a membership committee as recommended in the prior review
- Focus on regional ambassadors might help to provide more balanced global engagement
- Initiative to foster relationships with other divisions
- Clear priorities and initiatives for the next five years drawn from member feedback:
 - Priority 1: Innovative ways for increasing and diversifying engagement with the SAP community
 - Priority 2: Strengthening and widening program activities to increase value for members
 - Priority 3: Enhance growing program activities and membership services through aligned structure and governance
- All in all these three priorities lead to over 30 identified initiatives that should usefully address most of the concerns above

Recommendations

We suggest some recommendations for moving forward (several of these derive from ideas included in SAP's write up):

Domain and Relationship with other DIGs

- Differentiate the domain based more on theoretical perspectives and phenomena of study rather than emphasizing methods; many DIGs are methodologically pluralistic, so in the long run that is not as compelling a rationale for remaining a separate entity
- At least one initiative that is more explicitly externally focused and relates to communicating the DIG's unique niche to those outside the group
- As a group that meaningfully extends methodology, epistemology and phenomena studied by other Divisions, develop liaisons, events, and activities with OMT, STR, CMS, RM and other Divisions to contribute more broadly to the intellectual development of the field as a whole



Member Engagement

- Several interest groups that have become divisions in recent years have experienced downswings 5-7 years later, with the major exception being ENT. Consider action planning in light of this possible leveling phenomenon, and continue to monitor and nurture membership growth
- Leveraging AOM's specialized conferences initiative could enhance member engagement with the AOM overall

Governance

- The strategic plan presented in the report seems very ambitious. More details would be useful to assess the realism of such a plan; for example, develop a precise schedule detailing when each initiative will be launched and the dedicated resource allocation
- Develop a strategy for (sustainable) sponsorship, similar to that developed by TIM
- Organizing one executive committee meeting at the time of the annual conference is not enough for an IG having as a main objective moving to the Division status. Organizing a mid-winter meeting could be a very useful initiative that would be eased by succeeding in sponsorship; such a meeting could be virtual until resources are available for a face-to-face.
- Consider future needs for additional committees (research, award, for example) to facilitate/improve the organization and the conference processes in the years to come



MOONSHOTS

By 2022, the AOM will be *the* premier global community for management and organization scholars and for advancing the impact of management and organization science on business and society worldwide.

Specifically for members...

- AOM will connect members of the global management and organization community with one another and with external audiences through an unparalleled portfolio of engagement opportunities that transcend technological and geographic boundaries.
- AOM will provide to a diverse membership indispensable value characterized by extensive professional services, vibrant volunteerism, interactive communities, and re-imagined governance.

Specifically for the field of management and organization science...

- AOM will fundamentally advance knowledge creation and content dissemination for greater relevancy and impact on a diverse set of stakeholders and institutions around the world.
- AOM will aggressively and effectively champion the external standing of organization and management scientists as a globally-led, inclusively governed association.

