Social Issues in Management (SIM)

Five-Year Review

Report to the Board of Governors

The Academy of Management

2010

Review Team

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This report is in two parts. The first relates to a review of issues that are specific to SIM and our past efforts and future plans to address them. The second relates to the issues that are shared by all divisions and reflected in the Academy of Management's Health and Governance Checklist.

ISSUES SPECIFIC TO THE SIM DIVISION

The members of SIM come from a variety of disciplines and have a range of perspectives but one thing unites them – a commitment to values. 72% of SIM members surveyed report that the SIM division promotes values that are important to them. Only 9% disagree. Because values are deeply held, it is especially important that the SIM division respect the diversity of approaches scholars take with the field of Business Ethics and Business & Society and that we strive to be inclusive in ways that are specific to our division, as well as in ways that are shared by all the divisions.

Incorporating Social Scientists and Philosophers

In the SIM Division, scholars come from a variety of business disciplines, such as accounting, marketing and finance. In addition, many of our business ethics colleagues come from the field of philosophy. Philosophers are trained in a way that is very different from that of social scientists and it is important that the SIM Division respect those differences in its operations. We have been working to be inclusive in a variety of ways.

We maintain a strong relationship with the Society for Business Ethics (SBE) and have been building on that relationship in the past five years. SBE is an organization to which many of our philosophy-trained members belong (Note that we also have a strong relationship with the International Association for Business and Society (IABS), which we discuss later under "External Links"). SBE holds its annual conference in the same location as the Academy. The conference is always scheduled to precede the Academy with the last day or so of the SBE conference overlapping with the first day or so of the

AOM preconference. Where possible, we are considerate of the SBE schedule as we plan preconference activities so as to continually strengthen this relationship. Each year we have a keynote speaker that is shared by SBE and the SIM Division. We take turns selecting the speaker and organizing the reception. The speech is always well attended by both SBE and SIM colleagues. This tradition has been maintained and strengthened in the past five years. We also have undertaken new ways of collaboration. We now have a representative of SBE who attends our board meeting at the Academy and have identified a representative of SIM to be available to attend the SBE meeting. Last year, the SIM executive team attended the SBE closing banquet.

Incorporating Philosophers into the SIM Review Process

Thanks to the support of the Academy, we also made significant strides in incorporating our philosophy-trained scholars into the SIM program. Even the most highly trained and celebrated SIM philosophy-trained scholars have had no training whatsoever in empirical research methodologies. It is not a part of the philosophy tradition. For that reason, program chairs have had significant challenges when sending articles out for review. Someone with no background in empirical research methodology could not review an empirical study effectively.

Two years ago, the Academy permitted us to add a question to the questionnaire that potential reviewers complete. In it, potential reviewers were asked whether they were able to assess empirical articles, conceptual articles or both. We recognize that the question is of less use for other divisions. Perhaps it could weed out someone whose training is dated and/or a student just entering the field but one generally expects social scientists to all have training in empirical research. For the SIM Division, the inclusion of that question has been very important and has added to the quality of the reviews we can now provide as well as the atmosphere of inclusion we seek to promote. We are very grateful for the Academy's willingness to consider our situation and continued support in including that question of reviewers.

ISSUES APPLICABLE TO ALL DIVISIONS

SIM Division Metrics

Our membership statistics indicate a strong and growing membership. Over the past five years, the SIM Division membership increased its membership by 37.62%, which is about double the 18.79% average five –year growth in the overall Academy membership. The annual SIM average % change in membership was 9.69%, as compared to 5.24% in the overall Academy. Our international membership is growing, albeit at a decreasing rate. The only category of member for which we are experiencing a decrease is Emeritus. In this category, the division is dealing with very small numbers, going from a high of 27 in 2005 and 2006 to a low of 20 in 2009. Small changes can have large impacts on percentages.

While we are pleased with the increasing SIM membership, we are concerned that the rate at which the membership is growing is decreasing. Although the Academy in general is experiencing a decrease in new membership, the overall Academy's new membership is decreasing at a slower rate than SIM.

The SIM division election participation has been consistently higher than the average election participation in the Academy – though still lower than we would like it to be. 2009 was the low point of participation for both the SIM Division (35.42%) and the Academy (27.76%). We will try to get that up this year with reminders.

Finally, our financial metrics indicate financial stability and fiscal responsibility. We have lived within our means throughout the five-year period. As with all divisions, the conference is our greatest expense and the extent of that expense varies with the cost of living of that location. Our governance structure, with a dedicated and well-trained treasurer plays a large part in our financial standing.

In sum, the SIM division is on solid ground. While we will attend to the decreasing growth in new members and the decreasing participation in elections, we are gratified that our membership continues to grow and reassured that any decreases we are experiencing are also being experienced by the Academy as a whole.

SIM Division Membership Survey

Many of the aspects of the membership profile met our expectations. We will focus on those factors that were not necessarily expected and that point to goals we should pursue in the future.

Internationalization of the membership has been a goal of SIM for years. Nevertheless, the majority of SIM members still come from North America (74%). The second greatest percentage comes from Europe (18%). That leaves only 8% to come from Asia (5%), Oceania (2%) and South America (1%), with no members coming from Africa. Although we are pleased with the increase in international SIM membership, the preponderance of North American members remains a concern, as does the fact that our membership outside of North America is concentrated so heavily in Europe.

We were pleased to see that innovations in the SIM Academy program have been well received. We evaluated the percentage of respondents who were satisfied, very satisfied, or extremely satisfied with specific innovations, considering them to be well-received. SIMTracks, a printed electronic grid of the SIM programs, was well received by 86% of the respondents. The SIM "Push" Panel, which highlighted ways to make older 'classic' research relevant to today, met with 83% satisfaction, while the session in which dissertation finalist presented their work was well-received by 75% of the respondents. We will continue to offer programmatic innovations in forthcoming programs.

We were less pleased to see the level of satisfaction with SIM Academy reviews. Only a quarter of our members (28%) are extremely or very satisfied. About half of our members are satisfied (46%). That leaves over a quarter of our members (27%) who are somewhat

satisfied (21%) or not satisfied (6%). We recognize that conference reviews will never be perfect but we are trying to improve them however we can. We ran a session on reviewing at the 2009 meeting. Unfortunately, it was poorly attended. We will make similar efforts in the future. For the 2010 conference, Program Chair Shawn Berman is using super reviewers as gatekeepers, adopting the model of the OCIS division. We are hopeful that will improve the reviewing function.

An interesting theme develops upon deeper analysis of the survey results. Respondents indicate a belief that elections are open and fair, as are the selection processes for awards and recognition. They are satisfied with the responsiveness of division officers to member concerns 78% are satisfied with the opportunities that exist for becoming more involved in the division, but 32% are unclear about how to become involved. It is clear that we need to do a better job of informing the membership about how they can become involved. It seems that the membership believes in the good will of the people in the division. Many of the comments spoke of the collegial and supportive atmosphere of SIM. However, we still must do a better job of explaining how SIM members can become more involved over time.

Progress on the 2005 Goals

The last SIM Division review was in 2005. The Action Plan that resulted from that division review had four themes: 1. Internationalization, 2. Junior Faculty, 3. Internal Stakeholder Management, and 4. External Links. Analysis of our survey results and metrics indicate that some progress has been made and other goals have yet to be achieved. In the area of internationalization, there has been great progress.

- **Internationalization:** The International SIM membership grew from 332 in 2005 to 574 in 2009, an increase of 72.89% as compared to the 22.74% increase in domestic membership. The survey results show that the International membership comes primarily from Europe.

- **Junior Faculty**. The Junior Faculty program of the SIM preconference was instituted following the last division review and had received positive feedback. The program continues and is adjusted each year based on participant feedback.

- **Internal Stakeholder Management**. Many of the survey results point to good internal stakeholder relations. Most members would recommend SIM membership to a colleague and the comments repeatedly mentioned SIM's supportive and collegial atmosphere. However, although the results indicate that members feel that they are welcome to become involved in SIM, many still are not aware of how they can become involved.

- **External Links**. As mentioned previously, we have actively strengthened our relationship with the Society for Business Ethics and plan to continue to maintain our strong connection. SIM also cosponsored conferences with ISEOR in 2005 and in 2009. These were held at the University of Jean Moulin Lyon 3. Furthermore, SIM maintains a strong relationship with the International Association for Business & Society. IABS was formed as a way for SIM members to meet a second time during the year, and we schedule both the IABS Board and the Business & Society Editorial Board meetings for Sunday of the Academy. It has prospered with its own journal *Business & Society* that was recently accepted into the social science citation index. *Business & Society* is published by SAGE.

Action Plan for 2010

Our review of the Survey results and the Division Metrics pointed to areas that we would like to emphasize as we move forward. They fall into the areas of 1. Division Identity, 2. Member Inclusion, and 3. Member Involvement.

- **Division Identity**
  - We will continue our re-evaluation of our domain statement and our division name. We asked specific questions about this initiative on our survey and the answers will help us in our future work. We found that half the respondents were neutral about both the domain statement and name

change. However, there was more negative reaction to changing the name. 34% of the respondents disagreed with a name change while only 13% disagreed with a domain change. Similarly, 41% agreed with a domain change while only 18% agreed with a name change. We will take that helpful feedback into account as we continue the process. Also of note were the written comments we received, which matched verbal feedback from the conference. Our members would like us to come to closure on this task and we will strive to do that.

- o After we complete the name and domain change consideration, we will undertake a review of the bylaws. We recognize that they are in need of revision as well but wanted to reach closure on our domain statement work before undertaking by-law revision.

- **Member Inclusion**
  - o We will continue our efforts to strengthen our relationship with the Society for Business Ethics and to develop and strengthen relationships with international associations that are interested in Business Ethics and Business & Society issues.
  - o We will explore ways to reach out for members from areas that are currently under-represented, i.e., areas outside of North America and Europe.

- **Member Involvement**
  - o We will adjust our committee member and committee chair selection process to allow for more involvement from new members. We will begin the process earlier in the year and welcome self-nominations and we will communicate the process to current committee chairs so that they can be thinking of ways to bring new people into their committee work (by "new" we do not mean new members but members who have yet to become involved in committee work). We see committee membership as a way for members to become involved and more aware of SIM, as well as for us to

determine who has the necessary work habits to be considered for higher level posts. Of course, committee chairs would be reserved for people who have experience but we want committee chairs to reach beyond their own acquaintances and find members who want to become involved but don't know how to do that.

- o We will look for new ways to involve members beyond our current committee structure, such as task forces and other special projects.

In closing, we find that the SIM division is in good shape but still has improvements to make. We believe the three points of the above action plan represent the best use of our focused energy moving forward. We are grateful for the Academy's work in conducting a survey that sheds light on our operations for us. We also appreciate the change in format of the 5-year Division Report. The shorter free-form report enabled us to focus on our analysis and recommendations for the future.

Health and Governance Checklist

The purpose of this checklist is to monitor basic division/interest group health and governance. It is intended to stimulate conversation among the officers and prompt reflection. Copies of documents referenced in the checklist are **NOT** being requested. For each item please share an example that illustrates your answer or a quick idea for improvement, where applicable. Officers should expand on items calling for improvement in their report.

Bylaws and Domain	Yes	Yes, but needs improvement	No
1. The division/interest group's bylaws are up to date and periodically reviewed and revised, if necessary.	☐	☐	☒

Example/quick idea:

> Although we have been revisiting our division documents, our focus has not been on the bylaws. We have spent considerable time and energy in the past couple of years on our domain statement and whether or not we should change our division name. We intend to address the by-laws as soon as the domain statement revision is resolved.

	Yes	Yes, but needs improvement	No
2. The division/interest group's domain statement is current and activities reflect its full scope.	☐	☐	☒

Example/quick idea:

> As mentioned above, we have been actively pursuing a possible change in domain statement for more than a year. Although we have not yet made any changes, the process has been a good opportunity for self-reflection. Our membership is supportive of a change in domain statement (41% agree with the need for a domain statement change while only 13% disagree).

	Yes	Yes, but needs improvement	No
3. The division/interest group conforms to all official Academy policies as detailed in the Division and Interest Group Chair's Guidebook.	☒	☐	☐

Example/quick idea:

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Membership	Yes	Yes, but needs improvement	No
4. Membership statistics are periodically reviewed to understand trends (growth, decline) and who the division/interest group is serving (students, academics, practitioners, emeritus, international, etc.)	☒	☐	☐

Example/quick idea:

> Our membership committee is tasked with monitoring our membership trends and developing ongoing ways to attract new members and retain old members. They report to the board each year and at that time the group discusses both their initiatives and the nature of the trends in general. A condensed version of their report is given to the general membership at the annual meeting.

Membership (continued)	Yes	Yes, but needs improvement	No
5. The division/interest group delivers programs/services for all member constituencies.	☒	☐	☐

Example/quick idea:

We make this a priority in our planning each year. Our survey indicates that only 2% of our members are not satisfied with their membership in SIM and only 1% would not recommend SIM membership to a colleague. 88% of our members are satisfied, very satisfied or extremely satisfied.

Finance	Yes	Yes, but needs improvement	No
6. At least one person has responsibility for reviewing and understanding the division/interest group's financial reports.	☒	☐	☐

Example/quick idea:

We are fortunate to have Paul Dunn serving as our SIM Division treasurer. He keeps close tabs on our division finances throughout the year.

	Yes	Yes, but needs improvement	No
7. The division/interest group follows the Academy's financial policies, and routinely operates in the black.	☒	☐	☐

Example/quick idea:

Thanks to our treasurer, our financial accounts are well-managed and in the black.

	Yes	Yes, but needs improvement	No
8. If feasible, the division encourages outside sponsorship to extend its resources.	☒	☐	☐

Example/quick idea:

We have regularly sought and obtained outside funding for our doctoral consortiums, our awards, and our banquets. Unfortunately, as the economy has weakened so have our sources of outside funding. We continue to try to find new sources and maintain the ones we have.

Governance	Yes	Yes, but needs improvement	No
9. Periodic planning takes place to consider how the division/interest group might meet new challenges and opportunities.	☒	☐	☐

Example/quick idea:

The executive team communicates regularly by e-mail. Typically, we find that virtual communication is sufficient. However, we will meet face to face if necessary. Last year, we met mid-year to discuss a potential change in domain and/or division name. Those who were able to attend came to Penn State for the meeting and others were available through teleconferencing.

Governance (continued)	Yes	Yes, but needs improvement	No
10. There is a climate of mutual trust and respect among the officers.	☒	☐	☐

Example/quick idea:

Mutual trust and respect underlie much of the SIM domain and so it should not be surprising that we work hard to support each other. While officers are all very busy, we do our best to be responsive and to lend a hand to each other when needed.

	Yes	Yes, but needs improvement	No
11. The respective roles of officers and key volunteers are understood and some level of orientation/guidance takes place.	☒	☐	☐

Example/quick idea:

We rely on the Academy for formal orientation and expect officers to make informal orientation of the incoming person part of their responsibilities when departing a specific role. Other former officers are available for support as well.

	Yes	Yes, but needs improvement	No
12. The division/interest group actively attempts to involve members in volunteer and leadership positions, including international members and other underrepresented populations.	☐	☒	☐

Example/quick idea:

We monitor ourselves regularly for inclusion. 95% of our members are satisfied, at some level, with their opportunities to become involved in division activities. However, 32% of our members do not have a clear understanding of how to become more involved in division activities and so we need to do a better job of communicating. We are working on ways to communicate to members how they can become more involved in volunteer and leadership positions.

	Yes	Yes, but needs improvement	No
13. The current governance and committee structure serves the division/interest group well.	☒	☐	☐

Example/quick idea:

We have considered whether we need to make any changes but our current structure serves us well.

	Yes	Yes, but needs improvement	No
14. The division/interest group has a fair and open process for nominations and elections.	☒	☐	☐

Example/quick idea:

We believe we have a fair and open election process and the results of the survey seem to support our belief. 92% of our members are satisfied, very satisfied or extremely satisfied with our elections. Only 2 % are not satisfied.

Programs/Activities	Yes	Yes, but needs improvement	No
15. The officers periodically consider adopting new programs and modifying or discontinuing others. They know the strengths and weaknesses of their programs.	☒	☐	☐

Example/quick idea:

We do this annually. This year the survey results and division review provide us with a good opportunity to do that in more depth due to the feedback the survey provides.

	Yes	Yes, but needs improvement	No
16. Scholarships, travel stipends, or other funding programs are transparent and open to all who are eligible.	☒	☐	☐

Example/quick idea:

We strive to make all opportunities open to all who are eligible. Unfortunately, our Academy activities use up our funding and so we do not have funding programs such as those to offer.

	Yes	Yes, but needs improvement	No
17. The division/interest group has well publicized recognition programs (for service, scholarly contributions, etc) and the criteria for awards are transparent.	☒	☐	☐

Example/quick idea:

We have a best paper award, a book award and a dissertation aware. In addition, we have the "Sumner Marcus" award for outstanding service to the SIM division. 77% of survey respondents were satisfied, very satisfied, or extremely satisfied with the selection process for awards and recognition. 6% are not satisfied.

	Yes	Yes, but needs improvement	No
18. The division/interest provides opportunities and services to members with different interests, including teaching, research and practice-based interests.	☒	☐	☐

Example/quick idea:

Although our emphasis is on scholarship, which fits our membership profile, we strive to include items relevant to teaching and practice. 63% of our membership indicated that research was most important to them (as compared to 9% and 6% placing teaching and practice as #1 respectively). 62% placed teaching second or third and 64% placed practice third or fourth in importance.

	Yes	Yes, but needs improvement	No
19. Services to members extend beyond those provided at the annual meeting.	☐	☒	☐

Example/quick idea:

90% of our members are satisfied at some level with our efforts to provide services outside the annual conference. As mentioned in the report, we have the International Association of Business and Society (IABS) as a way for SIM members to join together a second time during the year. The SIM listserv also enables us to communicate with each other between conferences.

Programs/Activities (continued)	Yes	Yes, but needs improvement	No
20. The division/interest group carries out regular communication with members (minimally including a newsletter and up-to-date website).	☐	☒	☐

Example/quick idea:

97% of our survey respondents indicated that they were satisfied at some level with the level of communication received from the division. We need to stay vigilant about updating the website but the overall communication level seems to satisfy the membership.

	Yes	Yes, but needs improvement	No
21. The division/interest group actively works to build community (communities of practice, listservs, collaboration activities, social and special events) etc.	☒	☐	☐

Example/quick idea:

Only 4% of our members are not satisfied with the level of community in the SIM division. We need to continue to actively work on building community, but our efforts so far seem to have paid off. Most of the survey respondents see the size of the division as a strength rather than a weakness and that may help with building community.

	Yes	Yes, but needs improvement	No
22. The division/interest group actively strives to improve the annual meeting program by periodically reviewing program statistics to monitor meeting trends.	☒	☐	☐

Example/quick idea:

We monitor meeting trends each year and discuss them at our annual board meeting. We have noted that attendance at our sessions drops markedly when they are outside of our conference hotel (and the survey shows a strong member preference for activities scheduled inside the SIM conference hotel). We understand the difficulties inherent in scheduling but would appreciate having SIM programs in our conference hotel whenever possible. It helps to build community and markedly improves attendance.

	Yes	Yes, but needs improvement	No
23. Collaboration exists with other division/interest groups in the Academy.	☒	☐	☐

Example/quick idea:

We have collaborated with ONE in several areas, including the doctoral consortium and our banquet. We previously included PNP in our banquet as well.