

Management History Division Five Year Review Report

Management History Division Planning Committee

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Submitted to the

Academy of Management Board of Governors

via the

Division and Interest Group Relations Committee

February 11, 2010

Executive Summary

Reflecting upon our recent survey results, historical data, and the Academy of Management Health and Governance checklist, we offer our analysis of the well-being and functioning of the Management History Division. We find that although our division is small in number, it is comprised of loyal, active, and satisfied members who make significant contributions to the discipline and to the Academy. The small number, however, is a concern, as the management history division and annual program has not been growing at a comparable rate to the Academy of Management in general. While we would not expect our growth to match that of the broader organization, we would like to substantially close this gap. While Academy members have varying interests and expertise, all have a history that helps us grasp past events, understand contemporary paradigms, and inform future developments. As one of the original AOM divisions, and one of the few that directly relates to all other divisions, we are seeking to increase our visibility amongst current and future Academy members. We are pleased to note that our attempts have begun to bear fruit, as our 2010 paper submissions are up substantially.

Analysis of the Survey Results

In the Fall of 2009, Management History Division members were asked to complete an online survey to assist us in understanding our membership and their participation and satisfaction with the division. Of our 402 members, 85 responded giving us a response rate of 21.1%.

Membership Profile

Membership data (as of July 1, 2009) indicated that our membership has increased 10.74% since 2005, as compared to 28.99% for the Academy at large. Although our growth has been rather torpid, our division has maintained a healthy mix of long serving members (nearly 50% with eight years or more - 20% with 15+ years) and more recent contributors (just over 50% with seven years or less - 31% with less than three). We think this level of new membership is important to the field of management history and suggests our division and program have appeal to emerging scholars and established management historians.

The majority of our respondents were male (77%), academics-oriented (73% faculty and 18% students), and from North America (85%). We would note, however, that four percent of responses came from Asia. While this may seem a small percentage, we see this as a significant growth opportunity for our division. As anecdotal evidence, one of our committee members hosted a visiting scholar from China this past year with the express purpose of further developing management history as a research area in Chinese universities. This scholar is now a division member and was on the program at last year's annual meeting. We find this consistent with our

26.7% growth in international members since 2005 and will work to further develop global membership and participation.

As expected, our membership is broad with respect to management history being their primary division (33% definitely, 42% also identifying with other divisions, and 25% viewing management history as their secondary division). Our members often maintain membership in other divisions, their work frequently focusing on the history and foundations of those divisions. In this manner our members play a vital role in many management disciplines and divisions. In fact, a review of current data (1/09/10) shows our members maintain membership in 23 other divisions/interests groups with over 80% of our members also identifying with the Business Policy and Strategy, Organization and Management Theory, and Organizational Behavior divisions.

According to the survey, the most important reason given for respondents maintaining their division membership was to gain and share information relevant to research (55%). This is not surprising, as we are proud of the quality of work created, shared, and disseminated by our members. For example, at last year's meeting it was a management history division nominee that won the Carolyn Dexter Award. One of our papers from the previous year's program won the Paul Hersey Award from the *Journal of Applied Management and Entrepreneurship*. The prior year's best article from the *Journal of Management History* came from our annual meeting program. We also present well attended professional development workshops focused on research and exceptional symposia such as last year's offering with Ed Schein.

The next most significant reason for membership (26%) was to develop and maintain social connections. This also was expected, as we would consider our division as one of the most hospitable and collegial in the Academy. Whereas our small size is a detriment when it comes to time on the annual meeting program, it also means that members get to know and interact with each other more than with larger divisions.

Teaching was third and ranked first by only 14% of respondents. Since many schools do not teach a specific management history course/seminar, although we think they certainly should, many of our members primary teaching responsibilities lie in broader management disciplines. We have to be realistic in this area, as most faculty positions appear in areas such as strategy or organizational behavior and not with management history as the focus.

We were heartened, however, by the 11% of our members who joined to learn more about a domain that was new to them. This bodes well for the division as we are generating interest from those not traditional aligned with the discipline.

In addition to the standard metrics of the AOM survey, we also asked our members if they would recommend to a colleague that he/she join the management history division. Since we viewed growing our membership as an important objective, we thought this information would prove especially salient. We had 84 responses to this question and not a single respondent said no. 73% said they would recommend the division to others and 27% said they possibly would do so. While we want to work hard to move those “maybes” into the definitely column,

we find the overwhelmingly positive response gratifying and think it provides further evidence of the satisfaction and commitment of our membership.

This information is also consistent with the overall satisfaction expressed by our responding members. The vast majority of our members indicated they were extremely satisfied (33%), very satisfied (35%), or satisfied (23%) with their membership in the management history division (total of 91% satisfied or better). Only two responses indicated dissatisfaction. In order to further examine these responses, we went into the raw data to search for explanations. The first suggested dissatisfaction with the listserv being largely inactive. The second said they were new to AOM and had not had the opportunity to participate yet. While we consider ourselves the most welcoming group in the Academy, even one response like this suggests that we need to communicate that message even more aggressively with new members.

The Management History Program at the Annual Meeting

Fifty one percent of our responding members stated that they attend the AOM meeting every year even if they were not personally on the conference program. Another 16% attendance was dependent upon program participation. That just over half of our members almost always attend the meeting is certainly in line with other divisions. A review of some of last year's reports indicated 32% (ODC) to 58% (Careers) attendance and 39% - 50% for the divisions reporting the previous year. Also, like many divisions, over half (56%) of our members suggested the lack of funding as the major obstacle in attendance with only 7% not interested in attending.

Forty one percent of our respondents said they reviewed every year for the division and another 22% a few times. 22% also said they had never reviewed. Only 9% had served as a session chair or discussant every year. Twenty percent had a few times, 15% once, and 57% never. Seventeen percent reported that they routinely presented in the scholarly and PDW programs, 41% a few times, 11% once, and 31% never. While we would like to broaden participation even further, these numbers certainly indicate a membership that is involved.

Our membership also appears to be satisfied with the program put forth by the division. Ninety one percent of respondents reported being satisfied, very satisfied, or extremely satisfied for both the traditional paper sessions (36%, 26%, and 29%, respectively) and professional development workshops (34%, 32%, and 25%, respectively). The interactive sessions were less so with 74% being satisfied. Our symposia, however, satisfied 92% of respondents. In addition, 91% of our members reported satisfaction with the social and networking opportunities provided. We also take particular note that 92% of our membership indicates satisfaction with overall access to the program. In fact, there was only one respondent that was not satisfied with overall access to the program. Since 31% of respondents indicated they had never been on the program and 92% are satisfied with access to it, it appears that the lack of program presentation for many of these members is not a perceived lack of access.

Although we have demonstrated excellent quality in our annual meeting program scholarly papers and presentations, and our members' satisfaction concerning the program, we do have concern with the number of submissions. While we have always had a small number of submissions because of our size, submissions had not been growing. We had 47 and 48 papers

submitted in 2005 and 2006, respectively. Since then we had received 36, 33, and 34 (2007 – 2009). In an attempt to increase our visibility, our officers donated \$1,500 to allow one of our doctoral student members to reach out to non-traditional and less active PhD programs. Further, we communicated with all of our members seeking their assistance in encouraging their colleagues to participate more fully in the division and increased our participation at some of the regional Academy meetings.

In addition, the 2010 meeting will be the first since we have introduced the Sage Leadership Award for the best division paper on leadership and the best international paper award sponsored by the *Journal of Management History*. Both of these awards carry monetary prizes. We will promote these even more in the coming year to further foster quality paper submissions.

While we can't directly tie these efforts to our 2010 submissions, we are buoyant about our substantial increase. We had 54 paper submissions this year, giving us our best number in several years and more than a 60% increase from our three most recent meetings. We find this increase especially satisfying with the current economic situation and this year's annual meeting site. We were concerned that the lack of funding from many universities and the cost of travel to Montreal might work against our efforts to increase participation. Instead, even with the current milieu, our number is dramatically higher. We think this not only suggests that our efforts are beginning to bear fruit but, moreover, is indicative of the commitment and satisfaction of our division members.

Our acceptance rate for papers has been traditionally higher than for the broader AOM (from 3% higher in 2007 to 20% higher last year). Conversely, our acceptance rate of symposia has been significantly less (43% DIG versus 60% AOM last year). Although our acceptance numbers are not available for the 2010 annual meeting, we anticipate being in the suggested guidelines presented to the division chairs by this year's program chair.

Services and Leadership

If we look across the board at the 14 measures of satisfaction with the services and leadership provided, the mean response was over 84% of members satisfied or better. We were especially gratified to see that 90% were satisfied with the opportunities to influence the division, 94% perceived that we held fair and open elections, and 96% viewed the selection process for awards and recognition as fair.

Two areas, however, are noted for improvement. First, the satisfaction percentage was only 74% with respect to opportunities outside of the annual meeting to network/collaborate with peers. Only 7% were dissatisfied but 19% were only somewhat satisfied. Second, only 67% of responding members were satisfied with the value of the listserv (6% dissatisfied and 27% somewhat satisfied). This stands in contrast with the other areas concerning communication (81% from the division, 86% with the newsletter, 84% for the Web site, and 85% with the officers) from and within the division.

When considering future resources that the division might consider providing, our members expressed interest most in research funding (77%), teaching resources (75%), external

relations (73%), mentoring for junior faculty (71%), and mentoring for doctoral students (70%). Career resources, online events, and practitioner resources received the lowest levels of interest (52%, 57%, and 59%, respectively).

Health and Governance Highlights (Complete checklist is attached)

We think that we can easily make the case for the health, well-being, and continued functioning of the management history division. First, our survey results confirmed our assessment of the division. Although we are a small division, our members are very committed and satisfied, and contribute a great deal to the Academy.

In addition, our history indicates that our division members and officers work well with each other, with the other Academy divisions, and with the overall Academy leadership and staff members. We are always a willing partner in the attempt to strengthen the Academy and its service to the membership.

Also, although with limited numbers, our division produces high quality management history research that has been recognized by the Academy and multiple journals. We will continue to try and grow our numbers so that more of this work can be presented at the annual meetings and included in the best paper proceedings (as the space available is determined by the number of papers).

As far as finances are concerned, we are a responsible division. Since our last review (2005), there have been no years where the division account was overdrawn. Even though we

have put on various special events and receptions, we have successfully sought outside funds to offset the expenses. For example, in 2007 we had an exclusive session and reception for the Richard Hodgett's Award recipient. Yet, while our costs were up \$4,000 from the previous year, we sought and received a \$5,000 gift to cover the added costs. In recent years we have also received donations to help provide coffee, pastries, etc. for our early morning PDW sessions and sponsorships for monetary prizes associated with our division awards. Our financial stewardship has allowed us to go from a negative Fund Net in 2004 (-\$162.94) to \$3,610.05 (2005), \$3,772.88 (2006), \$5,097.55 (2007), and \$8,788.79 (2008). Our treasurer is monitoring these trends to make sure that we do not build up too much of a cash position but this does bode well for the division's ability to continue to meet the needs of our membership.

Recommendations for the Management History Division

While we are satisfied with the general health and functioning of the division, our analysis does suggest some areas for improvement and/or continued development:

1. Although our members indicated their satisfaction with much of the communication from the division (e.g., newsletter, Web site), the results of our survey indicate that we should improve the listserv to encourage discussions about historical research. This will provide a forum for established management historians but also allow those new to our discipline to further develop and participate.

2. Although we have a relationship with the *Journal of Management History* and provide access free to our membership, too many members are unaware of this benefit and it is underutilized. We will work to communicate this better.
3. We must also continue our focus on emerging scholars. While we are blessed to have living legends and the top producers in our field as members of the division, we have to find and develop the next generation of quality management historians and divisional leadership. This is important as we attempt to grow our membership.
4. We must be more consistent with encouraging international participation. In the past, the number of international participants (reviewer, session chair, presenter, etc.) has varied widely. This is a growth area for our division and we should set standards for participation to avoid the swings that often unintentionally emerge from program chair to program chair.
5. We must seek broader financial support for division activities. Although we have been quite successful in garnering support that support has routinely surfaced from the same few sources. With financial constraints rising, we will need to seek other sources as well, and make sure that we properly recognize those institutions that do consistently support the division.

We will address these issues in our upcoming executive team meeting. The results of those discussions will be presented to our members present at the annual business meeting and

communicated widely through the Web site and Academy resources. In addition, an open letter will be distributed to the membership to publically share the report and analysis and to seek further feedback to improve the functioning of the division and the satisfaction of our members.

Conclusion

From our review of our survey results, historical data, and the Academy of Management Health and Governance checklist, we conclude that the management history division is a healthy and functioning division. Although we are small in number due to the specificity of our focus, we are comprised of loyal, active, and satisfied members who make significant contributions. We do, however, seek to grow our membership, as well as the number of submissions to our annual division program, and will strive to improve our communication with our membership and the Academy at large. As one of the original AOM divisions, and one of the few that directly relates to all other divisions, we will continue to increase our visibility amongst current and future Academy members.

Health and Governance Checklist

Bylaws and Domain

1. The division/interest group's bylaws are up to date and periodically reviewed and revised, if necessary.

Yes. The executive team does so during the annual meeting.

2. The division/interest group's domain statement is current and activities reflect its full scope.

Yes.

The historical development of management concepts and practices and the historical roles of individual managers. Major topics include: historical assessments of the social consequences of management; reexaminations of established historical concepts; the historic role of behavioral sciences in the emergence of management practices; historical development of management of present-day companies; historical analysis of management philosophy; ways of using historical materials, new directions in historical research and oral history; the importance of a historical perspective in international management; historical aspects of quality control, cultures, and health and safety in the workplace; and topics that, although they may fall within some other division's domain, draw on historical data that are firmly rooted in a historical perspective.

3. The division/interest group conforms to all official Academy policies as detailed in the Division and Interest Group Chair's Guidebook.

Yes. We conform to AOM policies and consider them before taking action as officers.

Membership

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.).

Yes. We formally review them during the annual meeting and address the trends in the business meeting and in member correspondence during the year.

5. The division/interest group delivers programs/services for all member constituencies.

Yes. We have an excellent slate of programs for our main constituencies, which are faculty and students. In addition, though, we have offered numerous symposia and professional development workshops with practitioner focus and have instituted a program to encourage emeritus scholars to participate in the division. We also received a Challenge Award from the Academy of Management to offer podcasts with prominent management thinkers.

Finance

6. At least one person has responsibility for reviewing and understanding the division/interest group's financial reports.

Yes. This is formally the responsibility of the division treasurer but financial reports are disseminated to the entire leadership group and discussed.

7. The division/interest group follows the Academy's financial policies, and routinely operates in the black.

Yes. This is an area of strength for our division. For example, to offer expanded social opportunities and enhanced refreshments for our PDW sessions and reception, we have sought and received donations and sponsorships from multiple Universities to offset the increasing costs.

8. If feasible, the division encourages outside sponsorship to extend its resources.

Yes, but needs improvement. While we think we have done a good job in this area per the preceding question, we realize that we cannot always rely on the same schools to step up to the plate alone. In these times of constrained resources, it will be important that we strive to encourage contributions from a wider audience.

Governance

9. Periodic planning takes place to consider how the division/interest group might meet new challenges and opportunities.

Yes. The executive team does so formally each year at the annual meeting.

10. There is a climate of mutual trust and respect among the officers.

Yes. A resounding yes. This may be the strongest area for us as an organization. Many of us work together on journal boards, etc. in addition to our division activities and are colleagues more broadly than simply our AOM divisional affiliation.

11. The respective roles of officers and key volunteers are understood and some level of orientation/guidance takes place.

Yes, but needs improvement. In the past, most of this orientation has been very informal, so the education of successors has occurred but the intensity has not been as consistent as it could have been. We have endeavored to improve in this area with greater documentation in addition to informal mentoring.

12. The division/interest group actively attempts to involve members in volunteer and leadership positions, including international members and other underrepresented populations.

Yes. We have taken steps to intentionally broaden our program, reviewers, etc. to increase international participation. Last year we helped fund a member from China to attend and present at the annual meeting. We also have created an award for the best international paper in the division. As a small division, we are always seeking volunteers and have opportunities to participate.

13. The current governance and committee structure serves the division/interest group well.

Yes. We think the member survey supports this assertion.

14. The division/interest group has a fair and open process for nominations and elections.

Yes. The survey supports this position and we follow all Academy guidelines.

15. The officers periodically consider adopting new programs and modifying or discontinuing others. They know the strengths and weaknesses of their programs.

Yes. The leadership discuss this formally every year during the annual meeting.

16. Scholarships, travel stipends, or other funding programs are transparent and open to all who are eligible.

Yes. This is very limited however.

17. The division/interest group has well publicized recognition programs (for service, scholarly contributions, etc.) and the criteria for awards are transparent.

Yes. We announce these during the business meeting and/or reception. In addition, we initiated two new awards this year and communicated that to the membership through e-mail.

18. The division/interest group provides opportunities and services to members with different interests, including teaching, research and practice-based interests.

Yes. Although research has been/will be the primary focus, we offer symposia, paper sessions, and professional development workshops addressing each of these area.

19. Services to members extend beyond those presented at the annual meeting.

Yes. We maintain our Web site through which we offer our members' access to the *Journal of Management History*. In addition, the survey indicated that our newsletter was well regarded.

20. The division/interest group carries out regular communication with members (minimally including a newsletter and up-to-date Web site).

Yes, but needs improvement. In addition, we communicate directly with the membership through the AOM divdownload e-mail blast. We still could use improvement, though, because our members are less satisfied with our listserv for the MH division.

21. The division/interest group actively works to build community (communities of practice, listservs, collaboration activities, social and special events), etc.

Yes. In one sense, our division is small enough that community is our calling card. In addition, though, we have special programs to bring founding scholars together, recognize those that have played important roles in assisting the division with special receptions, etc.

22. The division/interest group actively strives to improve the annual meeting program by periodically reviewing program statistics to monitor meeting trends.

Yes. The officers do so formally at the annual meeting.

23. Collaboration exists with other division/interest groups in the Academy.

Yes. We have a history of joint sponsorship of symposia with many other divisions. As much of our work provides the foundation of other divisions, we also provide excellent opportunities for cross-divisional paper sessions.