OMT DIVISIONAL REVIEW
FREE-FORM REPORT

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INTRODUCTION

This free-form report is prepared as part of the Organization and Management Theory (OMT) Division’s 5 year review in 2010. It is submitted to the Academy of Management Headquarters for evaluation along with the Member Survey, Health and Governance Checklist, and Division Review Metrics. The latter three documents are materials that inform the conclusions in this report, along with the direct feedback from OMT members to the Divisional officers and volunteers.

DIVISION REVIEW METRICS

The Division review metrics concern the development of membership, meeting activities, governance, and finance. They provide a high-level overview of the Divisional strength as measured by number of members, activity levels, and finances. Although they can mostly stand without comment, a few explanatory notes and interpretations are offered here.

OMT is one of the older Divisions in a steadily expanding Academy of Management. Thus it is perhaps not surprising that the Division grows more slowly than the Academy as a whole with an average growth rate of 4.11% against 5.24% for the Academy. Likewise, the OMT Division has long been more international than the Academy with 43.8% international members in OMT against 35.7% in AOM in 2005, but the gap is closing. The figures for 2009 are 48.0% OMT against 41.1% AOM, placing AOM in 2009 close to OMT’s position in 2005.

Although these trends are easy to explain, they are not inevitable. The OMT Division should be able to achieve a higher international growth than it currently enjoys given its experience with an international membership and offerings for international members. Stronger
recruitment of international members is a realistic goal that can be accomplished through better web-based communications and outreach efforts to international academic associations with missions that overlap with OMT. Given the high proportion of international members any growth in that segment would also be significant for the overall growth of the Division.

The distribution over academic, emeritus, executive, and student members is the same in OMT as in the AOM overall, and there is no sign that OMT is either drawing or growing disproportionately in some groups. Having said that, the growth in student membership is marginally higher than the overall growth, which suggests that the Division has a good foundation for further growth.

The OMT Division is exceptionally active in the AOM Annual Meetings. Its 61.1% five-year growth in paper submissions compares to the 39.4% for the Academy as a whole. The numbers for symposia are more volatile for both OMT and AOM as a whole, but it seems fair to say that OMT is a paper-focused Division in both submissions and acceptances. The higher submission rate of papers is testimony to the high reputation of the OMT review process and its session composition, which lead many members of other AOM divisions to view OMT as a good destination for their papers. While this popularity is a desired outcome, it does strain the Division’s pool of volunteers and it has been difficult to grow the pool of reviewers to keep up with the submission growth. The reviewer recruitment has been most successful internationally (though from a smaller base), which is a desired outcome because it has led to a healthy situation where international members are engaged in the review process proportionate to their overall numbers. For a long time, international members were less influential in the paper selection process than their numbers would have indicated because of their lower reviewer signup rates. In the AOM overall, international participation in the
review process similarly lags behind that for the US.

The OMT Division follows the AOM overall closely in its electoral participation rates. Introduction of the Web based election was clearly a strong plus for participation but a recent decline (for OMT and AOM overall) suggests that the novelty may be wearing off. For the next election, some promotional activities over the web site may provide a rebound in the participation rate.

In finances, the OMT Division has a history of cautious use of limited resources. The prominence of the AOM Annual Meetings in our expenses injects substantial uncertainty into the budgeting process because hotel expenses are generally increasing and fluctuate by the city and hotel chain. That, combined with the relative absence of sponsor funds, until recently, has meant that OMT has found it best to maintain a high buffer of funds transferred from one year to the next. However, it is becoming increasingly clear that cautious management is not enough to maintain an activity level that corresponds to our members’ wishes, or even to keep up with the growing expenses of the Annual Meetings. The Division will need to seek increased sponsorship from external sources. If the search is successful, the buffer can be kept at the same size even as the overall budget grows, which would give more efficient use of the funds (lower proportion of idle funds).

OMT MEMBER SURVEY

The OMT member survey details the demographics of our members and how they evaluate the Division’s activities. The number of responses to the survey was 779. Not all respondents answered the more open-ended questions, which should be borne in mind when interpreting the various percentages. In the following, we report the main results of the member survey.
and offer interpretation of the results.

**Member Profile**

The OMT Division seeks to engage its members deeply and to have a high proportion of members that regard the OMT Division as their primary affiliation. On the question of whether OMT is the primary division (Q11), the numbers are good:

<table>
<thead>
<tr>
<th>Primary</th>
<th>No.</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, definitely</td>
<td>303</td>
<td>39.97</td>
</tr>
<tr>
<td>Yes, but I identify with another division</td>
<td>269</td>
<td>35.49</td>
</tr>
<tr>
<td>No, I identify mostly with another division</td>
<td>186</td>
<td>24.54</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>758</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

Our members have at least one other Division to which they belong, so there would be the same number of “No, mostly another” and “Yes, definitely” if we were only as appealing as any other Division. In fact, we are an anchor Division for many of the respondents. It is thus useful when planning activities to keep in mind that there may be differences between the preferences of members who are most attached to OMT and those who are equally or more attached to another Division. It would be especially problematic to neglect those who are most attached to OMT. Thus, below we will distinguish “primary” members (the 40% of respondents who answered “Yes, definitely”).

Basically, there is no difference demographically between primary and other members, except that OMT has slightly more primary members in the younger age groups. This could be a sign that we are doing well serving doctoral and junior scholars.
<table>
<thead>
<tr>
<th>Age</th>
<th>Not primary</th>
<th>Primary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>25-35</td>
<td>116 (actual)</td>
<td>87</td>
<td>203</td>
</tr>
<tr>
<td></td>
<td>122.6 (expected)</td>
<td>80.4</td>
<td></td>
</tr>
<tr>
<td>36-45</td>
<td>128</td>
<td>112</td>
<td>240</td>
</tr>
<tr>
<td></td>
<td>144.9</td>
<td>95.1</td>
<td></td>
</tr>
<tr>
<td>46-55</td>
<td>104</td>
<td>54</td>
<td>158</td>
</tr>
<tr>
<td></td>
<td>95.4</td>
<td>62.6</td>
<td></td>
</tr>
<tr>
<td>56-65</td>
<td>75</td>
<td>35</td>
<td>110</td>
</tr>
<tr>
<td></td>
<td>66.4</td>
<td>43.6</td>
<td></td>
</tr>
<tr>
<td>65+</td>
<td>26</td>
<td>7</td>
<td>33</td>
</tr>
<tr>
<td></td>
<td>19.9</td>
<td>13.1</td>
<td></td>
</tr>
<tr>
<td>&lt; 25</td>
<td>4</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>3.6</td>
<td>2.4</td>
<td></td>
</tr>
<tr>
<td>decline answer</td>
<td>9</td>
<td>6</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>9.1</td>
<td>5.9</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>462</strong></td>
<td><strong>303</strong></td>
<td><strong>765</strong></td>
</tr>
</tbody>
</table>

Respondents belong to the OMT Division (Q11) because of its emphasis upon ‘research’ (72% rank it as #1 and 18% rank it as #2 on their reasons for membership) and for the ‘social connections’ that it provides (14% ranked it as #1 and 36% as #2). OMT has long been a highly research-oriented Division and the survey confirms that we retain that valued profile. Some members want to share information about teaching (23% placed this reason as their #1 or #2 choice) and/or to learn about a new domain (26% #1 or #2). Primary and non-primary members look similar in their responses.

The qualitative responses relevant to this question match the categorical responses: 19% of these responses mention the high quality of scholarship and the importance of community. There are also good responses for diversity of scholarship (6%), cutting-edge scholarship (6%), and the value of networking opportunities and openness (16%). If anything, the social aspects of the Division are even more strongly emphasized in the written than in the
categorical responses.

The written responses to what members like least about the OMT Division are rather diverse (190 responses), but two inter-related themes are worth noting. For some members the Division is too large (13%) and appears stratified (13%) or overly US-centric (6%). Size can indeed be a liability and may work against a feeling of community and of easy access to the leadership. The Division needs to consider how these potential adverse effects might be mitigated. The challenge that the Division is US-centric is a view held by a mercifully low number given that nearly one-half of our members are international. The international representation in the OMT Executive should probably take some credit for keeping this number low but the Division needs to be sensitive to this issue.

**Member Activities**

OMT members regularly attend the Annual Academy meeting: 51% attend regardless of whether they are presenting papers and 25% only when ‘on’ the program. Primary and non-primary have similar responses.

There is a small but interesting difference between primary and non-primary members in their participation in particular activities (Q14), which is, that non-primary members are more likely to serve as chairs! But in PDW attendance and presentations, scholarly program attendance and presentation of papers, there are virtually no differences between primary and non-primary members, although primary members are slightly more likely to be involved as presenters.

Likewise, primary and non-primary members are remarkably similar in activity levels (Q15).
There is a slight lead in submissions and acceptances among primary members but it is not large, indicating that activity levels are not strongly segregated by primary Division. We interpret this result as a sign of inclusion and a healthy sign for the Division.

In answer to Q16, OMT members are less satisfied with posters and interactive sessions (43% and 37% are ‘not satisfied’ or ‘somewhat satisfied’). This situation is probably a typical result across Divisions, as these are the less prestigious activities.

OMT members view the PDW program as very important. It was ranked #1 by 35% of respondents and #2 by a further 22%. PDWs are perceived as being as important as regular sessions and more so than symposia. Although there is a fair amount of excitement and hype surrounding symposia (at least by the organizers), the survey results indicate that the OMT membership as a whole prefers regular paper sessions, though not by a large margin. The gap between satisfaction with traditional sessions and symposia is, however, more pronounced for presenters, for whom participating in regular sessions is twice as attractive as participating in a symposium (44% versus 20%). These numbers justify the extraordinary efforts that OMT Program Chairs have put into composing regular paper sessions. Over the last few years, OMT Program Chairs have been fairly restrictive in accepting symposia, an editorial policy justified by the above numbers.

**Member evaluation**

Our member responses to the question of their overall satisfaction with the Division (Q19) provide many encouraging results. We are very pleased by the many areas where OMT is evaluated highly. Thus, the responsiveness of Division officers to member concerns is rated satisfactory or higher by 73.5% of respondents, and the opportunity for members to become
leaders is at least satisfactory for 75% of respondents. The elections and award processes are rated satisfactory or higher by 88% and 82%, respectively. Because these processes are central to the Division it is a point of pride that such high levels of satisfaction are reported in the survey. We also note that a substantial majority of our members are satisfied with OMT’s collaboration with other Divisions (74%) and with activities that address the OMT domain (76%).

The overall picture provided by the member survey, in other words, is clearly positive. Nevertheless, attention should be given to the following in order to further improve the Division:

1. Provision of meeting opportunities outside of the AOM (46% of respondents are ‘not satisfied’/‘somewhat satisfied’).
2. The value of listservs (33%).
3. Provision of opportunities to influence the Division (32%).
4. A sense of community (32%).
5. Reaching out to international members (31%).
6. Usefulness of the website (30%).

We have already discussed communications as a ‘weakness’ of the Division and all the above responses validate that concern. Clearly, however, the provision of meeting opportunities outside the AOM Annual Meetings is the area of greatest discontent. (It may also be related to the views noted earlier that the Division’s size is a problem for some members, as is its current inadequate reaching out to international members.) The provision of opportunities outside the annual conference, however, is also the area that may be the most expensive to fix.
One possibility, and one that would fit well with our overall communications strategy (and funding), would be to provide ‘virtual’ meeting spaces rather than arrange actual conferences. Several of the qualitative responses made suggestions of this form. Similarly, the responses noted above on the adequacy of the listserv, member opportunities to influence the Division, the sense of community, the need to reach out to international members, and usefulness of the website all point towards a need to improve communications (including member communication to the Division).

We added a question specifically on communications because we were concerned (rightly, according to the survey results) that we were falling short (Q20). The results show that 55% ‘disagree’ with the statement that they ‘visit regularly’ the website and 28% ‘disagree’ that it ‘is a valuable resource.’ No other category of communications exceeds the 25% threshold of members who disagree on its utility. The responses suggest that we were right to be concerned about our communications. We believe that a stronger web site that allows the division to communicate to the members and the members to have virtual meetings spaces will constitute strong progress toward meeting these needs.

The responses on Divisional activities (Q22, and confirmed by the qualitative responses) are very clear. Our members want more activities for doctoral and junior faculty! Each of these was ranked by more than 50% of respondents as their first or second priority. Also, some interest is shown in invited talks from leaders in the field, with a combined first and second priority ranking of 32.5%. These wishes do not differ between primary and non-primary members.
The responses show that the activities where we currently put most resources (the junior and doctoral consortia) and our greatest marketing effort (the Distinguished Scholar breakfast and talk) are very well received. Clearly, the responses suggest that we are not misallocating resources. However, it would probably not be a good idea to allocate an even greater share to these activities because such a focus on the modal preference could make us less responsive to the diversity of OMT's membership. It might be possible to expand activities for doctoral and junior faculty members if we could get additional funding and volunteers.

The above analysis refers to the responses given to the categorical questions. In addition, the survey asked for open-ended comments and suggestions for the immediate and longer term. The number of responses to these questions is lower than the survey as a whole but do offer some suggestions.

The question - ‘What should occupy the OMT Division in the next 5 years?’ - elicited a broad range of responses that can be categorized as follows:

A. Overall focus
- research (often with a plea for maintaining high quality) 4%
- theory (ranging from a plea for paradigm coherence, to [more often] openness to new approaches) 5%
- teaching 3%
- need for relevance 13.5%

B. Branding/legitimation of OT
- the need to revitalize OT by engaging with new topics, of which sustainability and corporate social responsibility dominate 10%
- the need to enhance the status of OT in business schools 8%
C. AoM Conference
   - alter the paper sessions, more interaction, more PDWs, 10%
     more mini-conferences, be open to new approaches,
     more ‘papers in progress’, challenge the orthodoxy, more
     socials. Coordinate with ASA.

D. Process/Governance issues
   - More openness, “old boy’s club”, become ‘more 3%
     intimate, less elitist’, ‘not old and white’.
   - More contact with other Divisions 3%

E. Become more International 8%

F. More support for doctoral and junior faculty 10%

(This question had 196 responses out of the 779 survey respondents.)

These responses provide a range of good ideas and the dispersion of the responses suggest that the Division is not failing in particular areas—rather, it is facing a number of challenges related to the field of organization theory in general, as well as the position of OMT in the AOM and its responsiveness to member needs. But the OMT Executive needs to look carefully at two related themes indicated in these responses: the need to re-establish organization theory as a central discipline within the teaching and scholarship of business schools; and the need for greater relevance in its subject matter.

To further probe our members for ideas, we asked members what the Division could do tomorrow morning to increase its effectiveness. The responses contain specific ideas for activities that might be provided, but also proposals that suggest that members view the Division as a steward of ‘organization and management theory’ and as having a responsibility to address field-level concerns. Some of these suggestions (e.g., splitting AMJ) go beyond the OMT charter, but we can clearly take on a greater role in the development of organization
and management theory as a scholarly discipline. Below is a summary of members’ suggestions:

A. The Conference itself:
- change due date to Feb. 1
- fewer papers
- more PDWs
- enable ‘virtual’ attendance
- buddy system
- better reviewers
- more opportunities for interaction between junior and senior scholars
- leaders from outside Stanford and Michigan
- more opportunities for junior faculty and doctoral students to present
- make sure symposia are not paper sessions – more interaction
- more symposia cutting across disciplines
- avoid clash with ASA
- more cross-disciplinary papers

B. Other Forums
- connect to EGOS, IberoAOM or EURAM
- organize a mini-conference
- organize a conference in the Southern hemisphere
- start a new OT journal
- split AMJ into 2 (macro and micro)
- create overseas branches

C. Communication
- more interactive listserv website (very common theme)
- let people know what is on the website/updates (use e-mail)
- list relevant journals/calls for papers
- clearing house for working paper
- communicate opportunities to participate (7 mentions)
- post materials for the classroom

D. Other
- provide a peer mentoring system
provide international travel grants (there is a small number of members who find attendance a financial problem)
● more international awareness
● engage practitioners/translate cool findings (13 mentions)

(This question had 166 respondents out of the 779 survey responses.)

These suggestions, not surprisingly, are consistent with the answers provided to the categorical questions and which are analyzed above. They repeat the requests for better communication and for more recognition of the international membership, and reinforce the desire for meetings outside of the annual conference. These are recurring themes.

OMT DISTINGUISHED SCHOLAR AND PAST CHAIR SURVEY

In addition to the membership survey, we also made an email survey of the five most recent OMT Chairs and OMT Distinguished Scholars because they are representatives and leaders of the field and may have insights that a regular survey might miss. We asked them to identify the most important opportunities and challenges that face the field of organizational theory, and the most important means by which the OMT Division could support the field. The following themes emerged from their responses:

Challenge #1:

Research and teaching is becoming increasingly disconnected. One source of this disconnect is the move towards smaller, professional organizations (e.g., consulting, finance) as a major destination of MBA graduates, whereas much organization theory was developed in the context of large bureaucracies. Another source is the emphasis of environmental control in much current organization theory (e.g., institutional theory), whereas MBA students want to know about organizational agency both internally and externally.
NB. This challenge is consistent with the comments raised earlier that organization theory needs to recover its position within business schools and, more broadly, that it needs to ‘rebrand’ itself.

To meet this challenge, the Distinguished Scholars and past Chairs suggested that the Division:

- encourage research streams on modern topics such as “organizing” and entrepreneurship in the conference program;
- use the teachOMT initiative to disseminate teaching materials and course structures that better fit current teaching needs.

Challenge #2:

The AoM Annual Meeting sessions are becoming overly routinized and many are poorly attended, including those organized by OMT. The extra-conference activities of networking and job markets are having an undue effect on attendance at the regular program sessions.

To address this challenge, the following suggestion was put forward:

- Let PhD students be a source of renewal. A session could be set aside to be structured and delivered by PhD students, with a charter to do things differently and in a way that would appeal to their peers.

Challenge #3:

The journal publication process has become very onerous with an increased emphasis upon revisions, conformity to reviewer requests, and “novelty” in theory. The revision process suppresses the voice of the author and the emphasis on novelty threatens the status of
management as a social science (e.g., the sciences replicate, the humanities produce novelty).

To address this challenge, the following suggestion was put forward:

- Because many of the top journals have editors with an OMT affiliation, the OMT Division is uniquely placed to convene a conversation among editors on how the journal publication process currently functions, and to consider what should be done to improve it.

**In addition to the above challenges, the Distinguished Scholars/Past Chairs identified an opportunity that could help the Division’s development and increase its intellectual vibrancy.**

The opportunity is the strong international profile of the OMT Division and the contacts that its individual members bring to contexts that could reveal differences in how well different theories and empirical findings “travel”. These contexts also produce novel ideas and perspectives.

To take advantage of this opportunity, the Distinguished Scholars/Past Chairs suggest that:

- OMT should draw on these international contexts to renew organization theory through (a) the regular AoM Annual Meeting, (b) a mini-conference with a selected set of participants (possibly with a journal publication link?), and (c) greater development of contacts with international academic associations with missions that overlap with OMT.

*NB. Again, the above suggestion echoes the concern reported in the survey on the need to*
adjust the overly US-centric emphasis.

OBSERVATIONS FOR IMPROVEMENT

Given the above results, what should the OMT Executive do to move the Division forward?

We interpret all the above to mean that the Division needs to:

1. **Improve its communication with members.** This could involve:
   - building a stronger website that provides information (such as upcoming events, calls for papers etc) and allows sub-communities to develop.
   - enabling ‘virtual’ communities

2. **Rethink its ‘brand’ and contribution** to both scholarship and teaching in order to re-establish organization theory as a central discipline within the teaching and scholarship of business schools. This could involve:
   - giving more attention within the Academy conference to more ‘relevant’ topics.
   - organizing mini-conferences/workshops
   - continued emphasis upon the development of teaching resources

3. **Become more international** by building upon and servicing its evolving international relationships. This could be done by:
   - cooperating with other associations with mandates similar to OMT (e.g., EGOS)
   - giving attention to the voting slates for the Executive Committee
4. **Address the problems associated with the size of the Division.** This could involve:
   - special Academy sessions organized by doctoral students
   - increased sponsorship so that more doctoral events could be offered

5. **Build and extend its services at the Conference and elsewhere for junior faculty and doctoral members.** This could involve:
   - special Academy sessions organized by doctoral students
   - increased sponsorship so that more doctoral events could be offered

**GOALS AND ACTIONS**

At its February 2010 meeting the OMT Executive carefully considered the above ideas and developed the following list of goals and actions. As far as possible we attached a timetable to these actions in order to ensure that we move to address our member’s concerns. We will be reporting on these initiatives at our business meeting at the AoM Meeting in Montreal, which is open to all members, and they will be placed on the revised website.

**Goal #1: Rebuild the web-site by August 2010**

**Actions:**

1. Design a new web site during Spring 2010.

2. Split the Communications Officer role into two: a Communications Officer and Web Editor-in-Chief and a Web Editor-in-Chief. The latter to be recruited by June 2010. This specialization of responsibility will enable each incumbent to focus on web site maintenance and posting, and web content acquisition, respectively.

3. Programme the web site during summer 2010, to go live soon after the Montreal meetings.
Goal #2: Develop a stronger OMT profile

Actions:

4. TeachOMT to be linked to the new OMT Division web site, with more active solicitation of teaching materials.
5. Sessions at the 2010 meeting to be devoted to OMT profile development.
6. Mentoring sessions to be created for top rated AoM conference papers, starting in 2010.
7. Mini-conferences on topics relevant to OMT to be sponsored, starting in 2010.
8. Fundraising to be conducted for new initiatives to strengthen OMT profile; use of positive financial fluctuations to fund endowment.

Goal #3: Develop a more international OMT profile

Actions:

9. Nurture and extend the existing collaboration with EGOS. This summer, discuss with EGOS how OMT and EGOS can work together. Thereafter, explore possible collaboration with other international associations (e.g., EURAM). These initiatives should contribute not only to OMT’s international profile, but also to OMT’s profile more broadly, i.e., Goal #2.
10. Continue to ensure that international candidates are on the OMT Executive Committee ballot.
11. Create a PDW for international junior faculty focused upon finding an audience for their research (this initiative to be launched in 2011).
Goal #4: Develop a stronger community, especially for junior members

Actions:

12. Use the doctoral consortia and web site as sounding boards for AoM meeting program innovations. (This initiative to begin at the 2010 AoM Meeting with the expectation that forthcoming ideas will be implemented the following year).

13. Mentoring in point 6 will focus on top-rated papers authored by doctoral students.

14. Co-sponsorship of the mini-conference in point 7 will be required to have doctoral student representation in order to have OMT funding.

15. Give continued attention to the composition of the slates of candidates for the elected representative positions.

16. Encourage members to participate in the nomination and election processes.