

**Division Review Report
Research Methods Division
2012 to 2017**

Prepared by

John Kammeyer-Mueller (Committee Chair)

Michael Cole

Janaki Gooty

Steve Gove

Daniel A. Newman

Zhen Zhang

This report was submitted on 2/28/2018. Questions concerning this report should be directed to John Kammeyer-Mueller (email: jkamme@umn.edu).

Executive Summary

The Research Methods Division (RMD) has completed our Health and Governance Checklist in conjunction with reviews of member surveys and division financials. Our evaluation suggests that RMD is in compliance with AOM policies, has a well-functioning leadership and succession structure, and continues to evaluate and improve services for our members. The Executive Committee (EC) is a highly functional and collaborative body. Our bylaws, which are in compliance with AOM guidelines, are frequently consulted and reviewed. Further updates are being planned for the bylaws and domain statement in the coming year. We also intend to review our domain statement to ensure it is up to date with current research practices and the offerings of the division. These are both areas in which we *need improvement*.

Routine reviews of operational and financial performance are conducted. The division collects attendance data and satisfaction surveys from participants for all of our PDW offerings. A combination of strong attendance at PDWs and positive reviews from participants suggest that this is an area of strength. Our financial performance has been good, and we have utilized external funding to ensure recognition and support for scholarship in this area.

Our survey results indicate that members see RMD as an additional resource beyond their primary divisions. The most significant benefits for membership in the division include access to research resources and a community of scholars who discuss research methodology. Our own internal review of governance also suggests that we have done a good job of building a culture focused on mutual respect, thoughtful review of programs, financial prudence, and accountability. Our ongoing virtual Consortium (started in 2013, to serve Doctoral Students and Junior Faculty) has been well received.

Despite efforts to coordinate and improve engagement, we *need to improve* in providing services for international members and focus on improving gender parity in participation, community involvement, and leadership. We identified a number of potential methods to address these concerns. We also noted some ways that the division can address the changing nature of research needs of Academy members, and encourage more information and development related to study design and emerging methodologies.

This report reviews the activities and operations of the Research Methods Division (RMD) of the Academy of Management (AOM) during the five-year period from 2012 – 2013 to 2017 – 2018. This report is organized into three major sections: I - Analysis and Reflections on the Member Survey Results, II - Summary of the Health and Governance Checklist/Review of Division Metrics, and III - Goals/Actions Identified for the Division's Future. While each of these is treated as separate sections, discussion will often necessarily flow across sections. Supporting documentation is kept to a minimum, but necessary items are referenced in the text of this report and included as appendices.

I - Analysis and Reflections on the Member Survey Results

The Member Survey results, and our additional analyses of these results, are extensive (summaries are in Appendices). In our review below we have not emphasized reporting results already possessed by AOM. Instead we have focused on interpreting this information so that we may draw useful conclusions to guide the Executive Committee's (EC) strategic planning. We have also statistically analyzed the data to better understand underlying patterns.

RMD membership, paralleling AOM membership, has grown over the last five years to a total of 2,507 members. Of these members, 635 (25%) completed the survey. Similar to the survey from five years ago, 73% of respondents hold an academic membership. Also like the last survey, a majority of respondents (82.5%) ranked "gain and share information relevant to research" as the most important reason for being members of RMD. The next highest ranking reason for membership (8.6%) was "to learn more about a domain that is new to me." Answers regarding how long respondents have been members of the division also look very much like the previous survey, with 46% having been in the division for less than three years, 22% having been members between four and seven years, 13% having been members between eight and eleven years, and 19% having been members for over twelve years. The responses to these questions related to membership type, primary reason for membership, and duration of membership are also similar to data from the report ten years ago. The division's representation has become more balanced in terms of gender, with 45% of members being female, which compares to the previous survey in which 39% of members were female. A majority of members reside in North America (66%), which is a slight decrease from the last survey (69%); this (minor) trend toward increasing geographic diversity is also consistent with the previous survey.

RMD has seen itself as a complement to discipline-based divisions (we aspire to be "everyone's second division"). This is reflected in the fact that about half of respondents (51%) identify most with another division. Breaking down the other 49% of responses to the question "do you consider the RM division to be your primary division/interest group," 14% of respondents definitely consider RMD as their primary division/interest group. An additional 35% identify with another division almost as much.

Fifty four percent of RMD members give priority to attending the AOM annual meeting. Lack of funding is the primary reason why members do not attend the meeting (56%). Participation in the division is moderate, as evidenced by the 36% of members who have reviewed a few times or review every year for the division. This number likely understates willingness to review, though, because we can rarely use all those who volunteer. Sixty three percent have attended a regular conference session, and 51% have participated in the business meeting or social at least a few times or every year. Participation in program related conference activities is lower; out of the subsample of regular conference attendees, 47% have presented a scholarly paper or symposium, and 29% have presented at a

PDW. Lower participation on the program is not surprising because conference papers and PDWs frequently emphasize a new methodological contribution, which presents a high bar for members to clear. Program participation is often necessary to obtain funding, and the EC might consider additional ways to facilitate participation so that more members may obtain funding and attend the meeting. One possibility, noted later, is to provide either an RM submission development workshop, or to provide online tutorials regarding methodology papers.

Appendix 1 presents a breakdown of member satisfaction with aspects of RMD activities by gender, membership type, regional location, and primary division membership. Overall satisfaction with membership in the division was rated 3.46 on a five point scale or said differently 82.6% reported being satisfied, very satisfied or extremely satisfied. As a broad generalization, North American members tended to be more satisfied with RMD services and activities compared to members residing outside North America. There were fewer identifiable patterns for other groups, but where differences did exist, men were more satisfied than women, and those whose primary division was RMD were more satisfied than those whose primary division was not RMD. Although there were some minor differences in exact rank ordering, all groups gave top five rankings to their satisfaction with fair and open elections, the value of listservs, responsiveness of division officers to member concerns, access to participation in the program, and the selection process for awards and recognition. These are all core governance issues, and the high levels of satisfaction in these domains are encouraging. On the other hand, there was also consensus in terms of the areas most in need of development. Specifically, the lowest scores went to opportunities for members to receive mentoring, encouragement from division leaders to form communities for members, and opportunities outside the annual meeting to network and collaborate. It is worth emphasizing that these were the lowest ranked areas across all groupings of members; there is strong consensus regarding areas where greater attention is needed.

Appendix 2 provides a further breakdown of results across groups in terms of participation in Annual Conference Activities. Mirroring the pattern for satisfaction scores, student members and those whose primary division was not RMD tended to be less likely to participate relative to academic members and those whose primary division was RMD. This pattern makes sense, insofar as students simply have fewer opportunities to engage in activities like presenting or chairing due to their lack of experience, and those whose primary membership resides in other divisions are likely focusing their efforts on these other divisions. The most common forms of participation were attending conference sessions, social events, and PDWs. It should be noted that the results omit those who never attend the conference or who marked “NA” for their response. Members who are not in North America were much more likely to indicate that they were not at the conference, so the unconditional average of participation (i.e. not limiting the analysis to those who could attend) for international members is much lower. Finally, Appendix 3 provides a further breakdown of results across groups in terms of satisfaction with Annual Conference Activities. Here, the only notable pattern was that those whose primary division membership was RMD were more satisfied with the RMD program.

Our survey included a number of open-ended questions to further understand the strengths and weaknesses of our division. A summary of these responses are included in Appendix 4, and are broadly consistent with the previously mentioned results from closed-form questions. Response rates for these questions varied widely and for some questions were quite low, but content analyses of these results were largely consistent with the results discussed above. The thing respondents liked best about RMD (269 responses) was our division listserv, RMNET, (34.6%), followed by the network and community of

scholars (25.7%), opportunities for learning and professional development (24.2%), and access to resources and information that improve scholarship and research (15.6%). The most valuable benefits of Research Methods membership included opportunities for professional development (29.6%), receiving answers to questions from RMNET, (28.6%), access to tools and knowledge (21.2%), and connections with a community of scholars (20.6%).

Summarizing across a number of different questions, small numbers of respondents indicated that RMD should increase discussion of future trends and necessary skills for junior scholars and students, maintenance of current and novel methodologies, increased information and tools for methods use, and more in-depth methodology training. Other common suggestions included assistance in publication success, methods workshops outside of the annual meetings, and in-depth training on statistical techniques and software. In sum, our findings are broadly consistent with the idea that RMD serves as a focal point for individuals in a variety of disciplines who want a place to learn about research methodology with repository of resources on techniques to enhance rigor, as well as opportunities to seek out expert advice and discussions related to methodology. These suggestions form the basis of some of our future plans described in Section III of this report.

II - Summary of the Health and Governance Checklist/Review of Division Metrics

Our committee review of the items on the health and governance checklist indicated that while the division performs well on most (19) dimensions, we identified a need for improvement in the currency of our bylaws, our group's domain statement, our delivery of programs/services for all member constituencies, our efforts to involve under-represented populations in volunteer and leadership positions, and building a community. Below, we summarize our performance consistent with the groupings in the checklist. We have incorporated the completed "Health and Governance Checklist," which we have submitted as a separate document.

RMD has 2,507 members as of July, 2017 and we operate as a large division. Growth over the past five years has been steady at 1.93% per year, and is somewhat higher than the Academy as a whole, which has an average 1.08% growth rate. The number of new members is also positive, with an annual average 14.31% increase compared to the AOM general increase of 5.34%. This growth is consistent with the growth rates RMD experienced in the previous five year period. The biggest decrease in membership percentages is for executive members (average 5.94% decrease per year). The biggest growth rates are among emeritus members (average 4.34% increase per year) and student memberships (average 3.43% increase per year). The increase in student memberships compares positively to the Academy as a whole (average 1.03% per year) and fits with the general tendency for RMD to be seen as a resource for new scholars. It is also worth noting that our international membership has increased at a greater rate than domestic membership (international membership increases by 3.86% per year compared to .45% increase per year for domestic membership).

Bylaws and Domain

Items #1, #2, and #3 in the Health and Governance Checklist concern the Bylaws and Domain Statement (?) for the division. We believe that the division can benefit from a thorough review of both the bylaws and domain statement to ensure they are current. We have consulted regularly to ensure that the EC complies with the division's policies and procedures, as well as those of AOM as a whole.

Since our last review, we have continued to ensure that our bylaws were consistently referenced and, we feel that we have done a good job of keeping within the bylaws. When we updated our division website, we ensured that all bylaws were published there. We do feel, however, that this is an area where continued improvement will be made. The bylaws were reviewed and revised in 2014, although we believe the EC can still collective work to make some useful updates. As such, in the near term we will be working collectively to update everything.

By the same token, we think we can improve the domain statement to reflect our updated priorities and areas for improvement, noted later. In particular, we would like to emphasize the importance of research design, incorporation of new technologies, and integrative approaches that facilitate triangulation across methodologies. We think these changes, like those required for the bylaws, will be relatively conservative and will be an update rather than a complete revision.

Membership

Our review of Checklist items #4 and #5 shows that our membership levels are strong, and methods to maintain communication from members are in place. The EC monitors the statistics describing our membership, executive committee composition, program representation, PDW attendance, and awards on an ongoing basis. We assess our services to determine if we are meeting the needs of all constituencies represented in our membership. Because RMD endeavors to be everyone's second division, the interests of our membership are very broad (range from micro to macro oriented research questions, and from quantitative to qualitative research methodologies). Our goal of increasing inclusivity has been somewhat successful, in that about half of our PDWs and sponsored symposia have been related to qualitative research. This is one area where the division has been especially strong in meeting an identified need from the previous report.

Although we offer services to all of the groups above, we indicate (Checklist item #5) that we *Need Improvement* because we believe that RMD can do more to serve its members. Additional discussion on this topic is found throughout the report, but is central in part III Goals /Actions.

Finance

Consideration of the finance items on the Health and Governance Checklist (items #6, #7, and #8) showed no concerns. We have an elected Treasurer who monitors the division's finances, keeps in regular contact with the AOM finance team through Randy Murnane (the designated divisional contact) and ensures that we are always in compliance with the Academy's financial policies. An annual budget is prepared in conjunction with the RM Executive Committee (EC) and filed with the AOM finance group. The financial data provided in the Division Metrics were also reviewed and used to generate the Historical Actual Financials and Ratios of Expenses and Revenues provided in Appendix 5. Please note that at the time of preparation (Feb, 2018) the 2017 books have not been finalized. Therefore the 5-year averages are based on estimated values for 2017.

The Division has two accounts: An operating account and an endowment account. The endowment account contains funds provided under sponsorship agreement with SAGE with usage restricted to awards. The operating account serves as our primary account and is used for all other transactions.

Summary of Operating Account (2013-2017)

See *5-Year Summary of Research Methods Division Operating Account*.

The RMD approach to its finances is to balance prudent, conservative money management with a commitment to providing RMD services as broadly as possible to its membership. The RMD has operated in the black for the past five years, never overdrawing our account, and typically carries forward 25% of its total operating funds.

In 2016 the balance forward in the operating account dipped to a low of \$3,889.74 due to heavy spending on promotional items. The spending was driven, primarily, to avoid claw back of unused funds. Revocation of the claw back policy by AOM allowed the Division to increase the balance forward (\$10,738.17 at the start of 2017). This creates a beneficial cash cushion for any unexpected fluctuation in allocation or larger non-recurring expenses.

Inflows

Our primary source of funding for the operating account is the membership-based AOM allocation. This has increased since 2013 as membership in RMD has grown from 2,322 to 2,481, a 6.8% increase. The allocation has increased from \$26,438 to \$27,142. This constitutes virtually all of the funding used for routine expenses. The Division also receives \$17,000 annually from Sage. These funds are restricted to use for divisional awards and are reviewed as part of the discussion of the endowment. We unexpectedly received \$850 in 2017 when a session organizer charged participants who registered for a PDW session. It is the Division's policy to provide PDWs and other sessions at the AOM Annual Meeting for all AOM members without any additional fee.

Outflows

The Executive Committee (EC) regularly discusses possible uses for funds and the expense against the number of members served, and the long- and short-term benefits received by members. Annual meeting expenses (excluding awards) currently comprise the bulk of our expenses. RMD has spent an average of 92% of our annual allocation on expenses for the annual meeting. However, this 5-year average is not representative of current spending as in 2013 and 2014 the Division's annual awards were paid out of our operating account with external funding provided by Sage. The more representative three-year average is 70% of annual allocation being spent on meeting expenses. This includes spending on food and beverages ordered through catering for our members (\$12,976.98 in 2017) as well as a dinner for the EC and divisional representatives the night prior to our business meeting (\$1,343.82 in 2017).

The remaining expenses consist of sponsorship of the AOM new doctoral student consortium (\$1,000 annually), travel stipends for Division's student representatives (currently 4 @ \$650 each = \$2,600), and miscellaneous shipping and copies.

The Division's bylaws indicate that up to \$3,000 annually could be used to fund outreach consistent with our mission. Since 2016 we have budgeted \$2,000 annually for this purpose, but have not funded any initiatives. This results in lower than expected expenses.

Analysis of Operating Account

The Division's operating account is healthy. The EC continually monitors spending and plans events within our budget. The majority of our expenses relate directly to the annual meeting or in conjunction

with it (i.e., travel stipends for student representatives and donation to the New Doctoral Student Consortium). We will continue to balance ways to best serve our membership with the funds received while maintaining the financial health of the division.

Summary of Endowment Account (2013-2017)

See table *5-Year Summary of Research Methods Division Endowment Account*.

The Division's endowment is healthy, having increased from \$30,294.83 at start of year 2013 to \$42,196.58 (est.) 2017 year end (exact amount will depend on how the new AOM interest rules will be applied). The endowment will continue to grow by \$1,500 annually (before gains from interest) unless additional divisional awards are created.

Inflows. The RM Division's endowment account receives funds from SAGE publishing for the division's sponsorship of the journal *Organizational Research Methods* (ORM). Under the current agreement, renewed in fall 2015 and covering 2016-2022, SAGE will provide \$17,000 annually to the division with use of the funds restricted to awards. During 2013-2015 funding was \$15,000 annually.

Prior to 2017 the Division received 2% simple interest on the balance forward. Effective in 2017, interest will be based on the total balance forward of all divisional accounts at the current LIBOR rate.

Outflows. The Division's sole use of funds in the endowment account is for annual awards. The Division currently has six awards which total \$15,500 as follows:

Award	Annual An
SAGE/RMD Best Division Paper Award	\$2,000.00
SAGE/RMD Best Division Student Paper Award	\$2,000.00
SAGE/RMD/CARMA Early Career Award	\$2,500.00
SAGE/RMD Distinguished Career Award	\$4,000.00
SAGE/RMD McDonald Advancement ORM Award	\$2,500.00
SAGE <i>ORM</i> Best Paper Award	\$2,500.00
Total for all current awards	<u>\$15,500.00</u>

These awards and the amounts are part of the Division's Bylaws. Awards are split between any co-authors, so the total award amount will not exceed \$15,500 annually unless additional awards are created or award amounts increased.

Analysis of Endowment Account

During the period 2013-2015 the endowment grew by an average of \$2,700 annually. This growth was due primarily to the SAGE ORM Best Paper award being paid out of the Division's operating funds instead of the endowment funds plus interest on the account. Beginning in 2016, inflows from SAGE increased to \$17,000 and all \$15,500 of awards paid out of the endowment account. This results in a net increase in the endowment account of \$1,500 annually excluding any interest inflows. This is expected to continue in the future.

As noted, the current agreement with SAGE is valid through 2022 and we are confident it will be renewed in the future. In the *unlikely* event that the agreement with SAGE we not renewed, the Division would need to reassess spending on awards. Award amounts are specified in the Division's bylaws.

However, the endowment is currently sufficient to continue to fund awards at the approved levels for 2.48 years. This would allow ample time for the award amounts to be addressed through a bylaws change should sponsorship change.

Governance

The items on the Health and Governance Checklist (items #9 - #14) related to governance issues generated no special concerns. RMD does not have the financial resources to support a mid-year planning meeting. Our planning occurs at the annual meeting and by e-mail over the rest of the year.

The culture of RMD as a whole, and of EC, is based on respect, collaboration and service. Discussions by EC members are characterized by respect and cooperation even when we disagree. We are aware of no interpersonal issues hindering our work together, and this has been a consistent pattern for the division over the past five years, as well as the foreseeable future.

The EC has both standing (e.g. new member committee, awards committee), and ad hoc committees (e.g., how to involve more strategy people in the division committee) and this process seems to be serving us well. As new issues arise, EC members volunteer to head and serve on these committees. These committees may also include non-EC members who are occasionally recruited (e.g., a track chair for RMD Consortium) or who volunteer (e.g., historian). Volunteers for specific projects or committees are also occasionally solicited through our newsletters (e.g., Student Representatives to the EC).

Our elections are run according to the timetable and guidelines put forth by AOM. In addition to soliciting nominations from the membership at large through the open process, EC members encourage RMD members from a wide variety of stakeholder groups and member interests to apply.

Programs/Activities

Our assessment of the Health and Governance Checklist items (#15 – 23) shows that we offer a broad range of services that are continually modified and improved.

One way the RMD is responsive to members is that we routinely collect attendance data and ratings on every PDW we offer. These ratings are fed back to the PDW Chair for the following year, so that s/he can potentially solicit PDWs from the most successful PDWs of the past year. We also sometimes use the highest-rated PDW from the previous year as a plenary session for the following year, so that our very best PDWs will be available even to those who cannot attend the conference on Friday and Saturday.

In order to better serve our members, we introduced a Doctoral & Jr. Faculty Consortium since the last five year review, which runs during the summertime prior to the AOM conference. The Consortium spans several weeks, with guest speakers in Macro, Micro, and Qualitative tracks (in order to more explicitly serve our macro and qualitative members). The Consortium involves online speaker panels followed by question and answer sessions, and is heavily subscribed to, by our international members. These sessions are focused on how to use methodology to answer research questions, and to understand the role of research methods in the pursuit of science more broadly. Following the Consortium, participants are given the opportunity to develop mentoring relationships with consortium presenters.

The Consortium is also followed by a Saturday-night reception at AOM, to encourage opportunities for mentoring at the conference. We also offer an annual PDW called “Ask the Experts,” where RMD members can come and get their methods questions answered one-on-one with top experts in RMD.

To enhance communication with members, we have upgraded our website (<http://rmdiv.org/>) consistent with the plans established in the previous five-year review. The website includes information about division business (e.g., the summer RMD Consortium, elections, awards) as well as resources (e.g., syllabi for research methods courses, description and instructions for how to join the active RMNET listserv, and the Measures Chest). One of the chief ways we are immediately responsive to member needs is via the RMNET listserv. The listserv answers a variety of methods questions that members have submitted (e.g., when collecting data, performing analyses, responding to reviewer comments on a manuscript, etc.), often on the same day on which the question was asked.

III - Goals/Actions Identified for the Division/Interest Group’s Future

Broadening the scope of methods inquiry

The qualitative comments from members suggest that increased information about methodological tools and deep training in methodology are needed. The EC believes that the mission of the division can best be facilitated by addressing issues that will help scholars with all phases of the research process, regardless of methodological orientation. One of the key initiatives over the past years for the division has been to incorporate more qualitative methodology and macro content into the division’s PDW offerings and leadership structure.

This cross-fertilization has shown one key difference quite clearly. Specifically, the qualitative research tradition has done much to show how to design studies and collect data, including how to structure interviews, extract themes from surveys, and link the theoretical principles to design elements before going into the field. A doctoral student wanting to do this research would have a very solid understanding of how to design a qualitative study. In contrast, quantitative topics are often covered as if the data were already in hand. More specifically, the questions have mostly related to statistical analysis. The division has been expanding the scope of PDWs in recent years to incorporate more ideas for the early stages of studies. For example, some experts have presented on how design and implement experiments based on vignettes. Another example is a PDW in 2018 in which Associate Editors from Organizational Research Methods (ORM) will present on how non-methodologists can publish in ORM. PDWs that focus on scale development, maintaining appropriate response rates, selecting appropriate respondents for different types of research questions, or timing of repeated measures to match the nature of relationships being tested could all be given greater attention.

A second component of this initiative would involve new ways to integrate emerging technologies more fully into the research process. This is consistent with qualitative comments suggesting that cutting edge research tools should be covered by RMD. Large datasets with massive numbers of repeated measures are increasingly available for study, and we believe that RMD is in an ideal position to facilitate the use of these tools in a variety of disciplines. Recent PDWs have also shown how to design studies using wearable sensors, another new technique for gathering data. Machine learning and text mining approaches may represent an opportunity to blend the qualitative open-ended tools for research with quantitative approaches.

The EC has discussed ways to encourage participation of new members to RMD. One possible method may be to encourage an additional free division, so members may select three core divisions. The current structure often results in micro researchers choosing OB and HR, and macro researchers choosing STR and OMT. The EC would like to find a way within AOM to change this arrangement so that RMD will be more readily accessible to a broader membership base. We believe that drawing in members in this way may further dispel the sense that members will see RM as a “specialist” division.

Ensuring services and participation are available and relevant for all members

One of the areas for improvement we noted was in terms of ensuring that services and participation are available and relevant for all members. While most data suggest that our members are satisfied with core services, and we have made efforts to be inclusive, it is clear that such efforts should continue. We would like to improve representation of international members and women: as elected officers on the executive committee and volunteer positions in the division. In a similar vein, we note that the division has been led by women and international members, but this has been an inconsistent pattern. Our leaders who do have international ties have typically been employed in North American universities. We will work towards improving the presence and visibility of international executive committee members and women officers/volunteers by encouraging them to attend division socials, and represent the division in consortia so as to provide role models for individuals who might otherwise not identify with the division, and participate in submitting PDWs. Some members of the EC note that they have either experienced or heard that RMD is externally perceived as being composed of senior, highly accomplished individuals with a focus on quantitative expertise. Most individuals who participate more fully report that the division is indeed inclusive in attitudes, so we are especially interested in recruiting and representing diversity in visible roles. Since PDWs and CARMA tend to be the most visible Methods events, we will also continue our ongoing efforts to include individuals from underrepresented categories.

We could propose (as a goal for the Division) to prepare a future report about (potential) gender gaps at all levels of the RMD. This would include compiling data on female-male representation in (a) the Academy as a whole, (b) the RMD membership in particular, (c) RMD paper and symposium authorships, (d) RMD PDW leaders, (e) RMD paper, symposium, and PDW attendance, (f) ORM authorship, (g) RMD awards, (h) RMD exec committee nominations, and (i) RMD exec committee membership.

We also plan to look into the feasibility of explicitly encouraging underrepresented members running for officer positions, and as an EC to identify members of underrepresented groups who could be asked to serve in leadership roles. We also consider offering volunteer positions for diversity outreach and work with doctoral coordinators to encourage student participation in the division. To increase the diversity of offerings, we would also like to consider providing either an RM submission development workshop, or to provide online tutorials regarding how to develop methodology papers. This should help international members increase the likelihood of getting submissions accepted, which in turn will enhance their ability to both attend and participate in the division.

Improving continuous communication and responsiveness

Although communication and responsiveness have been areas of strength for RMD, as evidenced by both the surveys and the popularity of our webpage and listserv, we feel that this is also an area where continued growth is needed. As we noted in the second section, RMD members all have access to an e-mail listserv called RMNET. When a methods inquiry is e-mailed to the RMNET, methodologists typically respond within hours and a variety of perspectives are represented in these responses. One of the key areas for future development in the future is building on the current strategies through non-conference activities. This builds on both of the previously mentioned themes. Specifically, we feel that enhanced communication will increase the visibility of the division for groups who are currently not accessing resources. We will also use these outreach strategies to discuss methods to better serve multiple constituencies. Such initiatives are responsive to the comments and survey responses highlighting the importance of communication.

In this regard, we plan to expand our "Measure Chest" into a "Measure and Design Chest" to include recent syllabi, chapters, and best-practice articles on designing quantitative studies. We will also include resources relevant to researchers interested in strategic management and public policy related topics by developing online areas that share links to archival databases and administrative records. One possibility is to recruit individuals from within the division who have knowledge and experience related to social media to head up outreach through appropriate platforms.

Appendix 1

Overall Means for Satisfaction with the Division as a Whole and Comparisons across Demographic Breakdowns

	Overall	Gender		Membership type		Regional location		Primary division membership	
		Male	Female	Academic	Student	Other	North America	RM	Other
Social and networking opportunities	3.54	3.57	3.52	3.53	3.55	3.30	3.63	3.72	3.34
Access to participation on the program	3.66	3.66	3.70	3.66	3.65	3.57	3.70	3.73	3.59
Sense of community	3.29	3.43	3.12	3.29	3.27	3.04	3.41	3.45	3.10
Activities that address the division's domain	3.49	3.54	3.42	3.51	3.43	3.26	3.60	3.58	3.39
Welcoming of members from various demographic groups	3.43	3.57	3.29	3.46	3.34	3.15	3.58	3.52	3.33
Efforts to reach out to international members	3.18	3.24	3.11	3.22	3.05	2.83	3.46	3.29	3.06
Efforts to work collaboratively with other divisions	3.33	3.36	3.29	3.35	3.24	3.11	3.44	3.51	3.13
Opportunities outside of the annual meeting to network/collaborate	3.02	3.12	2.89	3.02	3.04	2.69	3.18	3.12	2.91
Encouragement from division leaders to form communities for members like me	2.89	2.99	2.76	2.85	2.99	2.66	3.00	3.01	2.75
Opportunities for members like me to receive mentoring	2.74	2.86	2.59	2.77	2.68	2.42	2.90	2.86	2.63
Level of communication received from the RM division	3.30	3.38	3.20	3.32	3.23	3.08	3.41	3.37	3.23
Quality of newsletter	3.30	3.36	3.23	3.32	3.24	3.11	3.41	3.36	3.24
Usefulness of website	3.40	3.45	3.33	3.43	3.27	3.31	3.44	3.44	3.35
Value of listservs	3.94	4.01	3.87	3.98	3.82	3.74	4.04	3.92	3.97
Responsiveness of division officers to member concerns	3.70	3.69	3.71	3.71	3.64	3.53	3.78	3.75	3.63
Ability of interested members to become leaders in the division	3.32	3.27	3.41	3.29	3.48	3.14	3.41	3.42	3.22
Opportunities to influence the RM division	3.25	3.24	3.27	3.22	3.40	3.00	3.36	3.34	3.15
Fair and open elections	3.97	4.00	3.94	3.97	3.93	3.96	3.97	3.93	4.01
Selection process for awards and recognition	3.63	3.68	3.61	3.64	3.62	3.56	3.67	3.65	3.61

All items rated on a 5-point scale with 1 = not satisfied, 2 = somewhat satisfied, 3 = satisfied, 4 = very satisfied, and 5 = extremely satisfied; responses marked as N/A omitted. Bolded means indicate a significant difference at $p < .05$ identified through a regression model including all demographic information above, as well as age.

Appendix 2

Overall Means for Participation in Annual Conference Activities and Comparisons across Demographic Breakdowns

	Overall	Gender		Membership type		Regional location		Primary division membership	
		Male	Female	Academic	Student	Other	North America	RM	Other
Served as a reviewer	2.04	2.10	2.04	2.16	1.82	2.06	2.09	2.29	1.90
Presented at a PDW	1.45	1.51	1.45	1.58	1.15	1.42	1.52	1.63	1.36
Attended a PDW	2.37	2.46	2.48	2.40	2.70	2.54	2.43	2.55	2.39
Presented a paper at a scholarly session	1.89	1.99	1.89	2.02	1.75	1.92	1.97	2.22	1.72
Served as a chair or discussant	1.35	1.41	1.32	1.47	1.09	1.28	1.43	1.51	1.26
Attended a regular conference session	2.68	2.77	2.84	2.82	2.80	2.76	2.84	2.89	2.74
Participated in social events/ business meetings	2.42	2.57	2.46	2.54	2.48	2.36	2.60	2.73	2.34
Volunteered in some capacity	1.36	1.41	1.34	1.44	1.19	1.20	1.47	1.52	1.26

All items rated on a 4-point scale with 0 = never, 1 = once, 2 = a few times, 3 = every year; responses marked as “N/A” omitted. Bolded means indicate a significant difference at $p < .05$ in a negative binomial regression model including all demographic information above, as well as age and frequency of conference attendance.

Appendix 3

Overall Means for Satisfaction with Division Activities and Comparisons across Demographic Breakdowns

	Overall	Gender		Membership type		Regional location		Primary division membership	
		Male	Female	Academic	Student	Other	North America	RM	Other
Professional development workshops	3.94	3.89	3.99	3.91	4.00	3.77	4.01	4.03	3.84
Traditional paper sessions	3.47	3.48	3.46	3.44	3.55	3.35	3.52	3.60	3.33
Discussion paper sessions	3.51	3.52	3.51	3.48	3.64	3.41	3.56	3.65	3.38
Symposia	3.76	3.75	3.81	3.75	3.81	3.69	3.79	3.87	3.65
Plenaries	3.45	3.43	3.52	3.41	3.68	3.49	3.43	3.60	3.28

All items rated on a 5-point scale with 1 = not satisfied, 2 = somewhat satisfied, 3 = satisfied, 4 = very satisfied, and 5 = extremely satisfied; responses marked as N/A omitted. Bolded means indicate a significant difference at $p < .05$ in a regression model including all demographic information above, as well as age and frequency of conference attendance.

Appendix 4
Summary of Open-Ended Responses on Survey (2017)

Question 15. What do you like best about membership in the RM division?

1. The Listserv (RMNet) and Newsletter (count=93; question percentage=34.6%)
2. The network and community of scholars (69; question percentage=25.7%)
3. Opportunities for learning and professional development in RM (65; question percentage=24.2%)
4. Access to resources and information that improve my scholarship and research (42; question percentage =15.6%)

Question 16. If there is one thing you would most like to improve regarding the RM division, what would it be?

1. Greater discussion of both future trends and necessary skills for junior scholars/students (66; question percentage=35.7%)
2. Develop a more engaged and inclusive division (53; question percentage=28.6%)
3. More methods workshops within and outside of AOM (50; question percentage=27.0%)

Question 17. What issues should occupy the RM division's time over the next 5 years?

1. Maintaining currency and novelty in methodologies (97; question percentage=56.4%)
2. Increase diversity within the division and connections to other divisions (34; question percentage=19.8%)
3. Provide more methods training opportunities (23; question percentage=13.4%)
4. Expanding the visibility (e.g. use of website) and quality of publishing (18; question percentage=10.5%)

Question 18. What can the RM division do tomorrow morning that would increase its effectiveness?

1. Supply more information and tools for use (51; question percentage=39.2%)
2. Communicate better with members (e.g. use of website, newsletters, direct emails) (32; question percentage=24.6%)
3. Create networks with other divisions and business (27; question percentage=20.8%)
4. Encourage mentorship or peer meetings (20; question percentage=15.4%)

Question 19. I believe the greatest value I receive from my Research Methods Division membership is?

1. Opportunities for professional development (56; question percentage=29.6%)
2. The Listserv (RMNet) (54; question percentage=28.6%)
3. Access to various tools and knowledge (40; question percentage=21.2%)
4. The connections with and community of scholars (39; question percentage=20.6%)

Question 20. What is the most important thing that the Research Methods division could do to add value to you either professionally or personally in the upcoming years?

1. Greater assistance in publication success (43; question percentage=35%)
2. Increase the availability of information and methods training (34; question percentage=28%)
3. Mentorship opportunities (25; question percentage=20%)
4. More workshops and professional development sessions (21; question percentage=17%)

Question 21. What can the Research Methods Division do to reach out to current member to increase their participation in division activities and/or to non-members to encourage joining the division?

1. Minimize the hierarchies and social cliques (46; question percentage=37.4%)
2. Improve communication with general members (28; question percentage=22.8%)
3. Promote assistance with research and publications (25; question percentage=20.3%)
4. Make greater use of online resources (i.e. social media, email, newsletters, etc.) (24; question percentage=19.5%)

Question 22. What suggestions do you have for Professional Development Workshop (PDW) topics at the annual meeting?

1. More in-depth training for the various approaches (53; question percentage=48.2%)
2. Opportunities for collaboration with business and other divisions (33; question percentage=30.0%)
3. Training on tools, techniques, and software (e.g. R) (15; question percentage=13.6%)

Appendix 5
Research Methods Division
Historical Actual Financials

OPERATING ACCOUNT

Operating Account Date (Data from Yearly Status Reports)	2012	2013	2014	2015	2016	2017
BALANCE FORWARD	\$ 7,783	\$ 13,451	\$ 9,416	\$ 8,615	\$ 3,890	\$ 10,739
Balance forward as % of annual allocation	28%	51%	36%	33%	15%	40%
Change in balance forward from prior year	-28%	73%	-30%	-9%	-55%	176%
DIVISION ANNUAL ALLOCATION	\$ 27,472	\$ 26,438	\$ 26,042	\$ 25,899	\$ 26,262	\$ 27,142
TOTAL OPERATING FUNDS AVAIL.	\$ 35,255	\$ 39,889	\$ 35,458	\$ 34,514	\$ 30,152	\$ 37,883

ANNUAL SPENDING (Note - this is pulled from several different reports; values may be off slightly for prior years)

Actual	\$ 21,804	\$ 30,748	\$ 26,843	\$ 30,624	\$ 19,394	\$ 25,396
NET SURPLUS (DEFICIT) Calculated as allocation-spending	\$ 5,668	\$ (4,310)	\$ (801)	\$ (4,725)	\$ 6,849	\$ 1,746
Annual Expenses as % of allocation	79%	116%	103%	118%	74%	94%
Year End Balance as % of allocation	49%	36%	33%	15%	41%	46%

CORRECTED SPENDING (Awards paid with operating funds)

Value of SAGE ORM award added back into operating account	\$ 1,250	\$ 1,666	\$ 2,500	\$ 2,500		
CORRECTED SPENDING TOTAL	\$ 20,554	\$ 29,082	\$ 24,343	\$ 28,124		
NET SURPLUS (DEFICIT) Calculated as allocation-corrected spending	\$ 6,918	\$ (2,644)	\$ 1,699	\$ (2,225)		
Annual Expenses as % of allocation	75%	110%	93%	109%		

ENDOWMENT ACCOUNT

Endowment balance	\$ 26,701	\$ 30,295	\$ 32,943	\$ 35,644	\$ 38,399	\$ 40,697
\$ Change from prior year	\$ 6,525	\$ 3,594	\$ 2,648	\$ 2,701	\$ 2,755	\$ 2,298
% Change from prior year	32%	13%	9%	8%	8%	6%

5-Year Summary of Research Methods Division Endowment Account

Year	Inflows - SAGE Agreement	Inflows - AOM Interest	Outflows - RMD Annual Awards	End of Year Balance	Net Change in Balance	Endowment's Coverage of Awards	Notes
2012				\$30,294.83			
2013	\$15,000.00	\$645.94	\$(12,998.00)	\$32,942.76	\$2,647.94	2.20	SAGE/ORM Best Paper Award (\$1,666) paid out of Division's operating account
2014	\$15,000.00	\$698.90	\$(12,998.00)	\$35,643.66	\$2,700.90	2.38	SAGE/ORM Best Paper Award (\$2,500) paid out of Division's operating account
2015	\$15,000.00	\$752.91	\$(12,998.00)	\$38,398.57	\$2,754.91	2.56	SAGE/ORM Best Paper Award (\$2,500) paid out of Division's operating account
2016	\$17,000.00	\$797.97	\$(15,499.98)	\$40,696.56	\$2,297.99	2.39	
2017	\$17,000.00	\$-	\$(15,499.98)	\$42,196.58	\$1,500.02	2.48	
Avg.	\$15,800.00	\$579.14	\$(13,998.79)	\$37,975.63	\$2,380.35	2.40	

Notes: AOM calculation of interest changes in 2017; conservatively est. at \$0 as it had not been posted at the time the analysis was conducted.

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.

<u>Bylaws and Domain</u>	<i>Yes</i>	<i>Yes, but needs improvement</i>	<i>No</i>
<p>1. The division/interest group's bylaws are up to date and periodically reviewed and revised, if necessary.</p> <p>Example/quick idea: The most recent revisions to the bylaws occurred in October 2013. Members of the executive committee intend to review these bylaws again soon.</p>		X	
<p>2. The division/interest group's domain statement is current and activities reflect its full scope.</p> <p>Example/quick idea: Our division domain statement describes our broad focus, and incorporates key features for multiple levels of analysis and a variety of methodologies and research traditions. As we note later, using this domain statement as a guiding principle for selection of PDWs and paper sessions has facilitated a balance of different approaches and a steady increase in coverage for areas like qualitative methods that were under-represented in the past. However, we also feel that it may be appropriate to consider ways to update the scope statement as an executive committee.</p>		X	
<p>3. The division/interest group conforms to all official Academy policies as detailed in the Division and Interest Group Chair's Guidebook.</p> <p>Example/quick idea: We conform to the policies as set forth by the Academy. Our executive committee members attend the training sessions at the Annual conference. We make frequent reference to the Academy approved bylaws for decision making and elections. Our treasurer regularly reviews financial decisions to ensure that all expenditures are consistent with Academy rules.</p>	X		
<u>Membership</u>	<i>Yes</i>	<i>Yes, but needs improvement</i>	<i>No</i>
<p>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.)</p> <p>Example/quick idea: Feedback is collected from members of the division. Membership statistics are reviewed at the annual meeting and are presented in the business meetings. We audit conference and other offerings to ensure that we provide services to individuals in multiple research traditions and from a variety of divisions within the academy so members from diverse backgrounds are adequately represented. We also provide additional sessions involving distance-oriented presentations to help individuals outside of North America have access to research methods experts.</p>	X		

<u>Membership (continued)</u>	<i>Yes</i>	<i>Yes, but needs improvement</i>	<i>No</i>
<p>5. The division/interest group delivers programs/services for all member constituencies.</p> <p>Example/quick idea: Our program resources are directed toward activities that will be of general interest for all divisions, which is attested to by the large number of survey respondents who note that RMD is a secondary division beyond their primary topic area. The professional development workshops at annual conferences, website resources for survey development, and RMNET listserv draw participants from many different member groups. We also provide a dedicated pre-conference consortium for student members which is delivered remotely so international members can participate. However, we also recognize through our survey data that greater efforts are needed to enhance our outreach to members who are not located in North America and more effective community building and inclusion efforts should be made for women.</p>		X	
<u>Finance</u>	<i>Yes</i>	<i>Yes, but needs improvement</i>	<i>No</i>
<p>6. At least one person has responsibility for reviewing and understanding the division/interest group's financial reports.</p> <p>Example/quick idea: Our division has a dedicated treasurer role. This individual carefully tracks all division expenditures and routinely reports to the EC on the financial health and spending patterns of the division during both the annual meeting and through periodic communication through the course of the year.</p>	X		
<p>7. The division/interest group follows the Academy's financial policies, and routinely operates in the black.</p> <p>Example/quick idea: RMD has not overdrawn its account over the past five years, and has carried over approximately 25% of total operating funds from year to year. The division has a significance balance forward at the start of 2017, which will serve as a cushion for either fluctuations in allocations or specific one-time expenditures.</p>	X		
<p>8. If feasible, the division encourages outside sponsorship to extend its resources.</p> <p>Example/quick idea: The division has sponsorship agreements with Sage Publications which have allowed us to fund academic awards and ensure that the division maintains good financial health.</p>	X		
<u>Governance</u>	<i>Yes</i>	<i>Yes, but needs improvement</i>	<i>No</i>
<p>9. Periodic planning takes place to consider how the division/interest group might meet new challenges and opportunities.</p> <p>Example/quick idea: Our annual review executive counsel and business meeting to review our activities, and we have regular communication among the executive committee to discuss ongoing developments in the field. Example activities including planning for updates to the division Website to make access to the measure chest easier.</p>	X		

<u>Governance (continued)</u>	<i>Yes</i>	<i>Yes, but needs improvement</i>	<i>No</i>
<p>10. There is a climate of mutual trust and respect among the officers.</p> <p>Example/quick idea: The division has consistently worked to ensure that there is an atmosphere of mutual respect and assistance. Our executive committee and other committees within the division communicate regularly over e-mail, and our annual executive committee dinner, which incorporates our student volunteers, has been a consistently positive experience.</p>	X		
<p>11. The respective roles of officers and key volunteers are understood and some level of orientation/guidance takes place.</p> <p>Example/quick idea: The nomination process for offices are clearly outlined on the RMD webpage. We continually update documents to facilitate communication of best practices and knowledge for division officers across years. Individuals in the division's leadership track are also encouraged to communicate with individuals who have held the role previously. We also ensure that our annual dinner incorporates incoming and outgoing executive committee members to facilitate discussion regarding roles and ongoing responsibilities. We also incorporate student volunteers into this process, with the goal of building a pipeline of potential future leaders.</p>	X		
<p>12. The division/interest group actively attempts to involve members in volunteer and leadership positions, including international members and other underrepresented populations.</p> <p>Example/quick idea: Results from our annual survey suggest that members in North America are more satisfied with social and networking opportunities within the division, and feel the division's communication is of higher quality relative to members not in North America. Our review also notes that female members are less satisfied with social aspects of the division relative to male members. The division is working on initiatives that will help to address these concerns.</p>		X	
<p>13. The current governance and committee structure serves the division/interest group well.</p> <p>Example/quick idea: We adhere closely to the policies laid out in the division bylaws, and allocation of responsibilities to different committees generally proceeds in a timely fashion. We have used committee structures to spread the workload across members to the best of our ability.</p>	X		
<p>14. The division/interest group has a fair and open process for nominations and elections.</p> <p>Example/quick idea: Nominations for open positions are consistent with the AOM election process. Members of the executive committee also reach out to potential candidates in hopes of encouraging individuals from groups we have not sufficiently incorporated in the past (e.g., international members, macro, and qualitative researchers in particular) to be part of the division's leadership structure. The annual survey demonstrates that our members believe that the process for elections has been fair and open.</p>	X		

<u>Programs/Activities</u>	<i>Yes</i>	<i>Yes, but needs improvement</i>	<i>No</i>
<p>15. The officers periodically consider adopting new programs and modifying or discontinuing others. They know the strengths and weaknesses of their programs.</p> <p>Example/quick idea: The EC discusses potential program changes and opportunities during our annual meeting. The quality of PDW sessions and the Listserv are frequently discussed as strengths of the division. Ideas for increasing the website and other communication activities are also discussed collectively.</p>	X		
<p>16. Scholarships, travel stipends, or other funding programs are transparent and open to all who are eligible.</p> <p>Example/quick idea: Our funding programs largely relate to food and beverages at the annual meeting available to all members of the Academy, as well as travel stipends for the Division’s student representatives. Information related to these programs are freely available from the division and are provided consistent with the Division’s bylaws.</p>	X		
<p>17. The division/interest group has well publicized recognition programs (for service, scholarly contributions, etc) <u>and</u> the criteria for awards are transparent.</p> <p>Example/quick idea: At the annual meeting, we recognize individuals for membership in the division, including serving as a member of the leadership track, representatives at large. We also recognize individuals for scholarly contributions with the Sage best conference paper award, the best student paper award, the Robert McDonald Advancement of Organizational Research Methodology Award, a distinguished career award (co sponsored by Sage publications), and an early career achievement award. The process for awards nomination and voting are publicized and overseen by an awards committee.</p>	X		
<p>18. The division/interest provides opportunities and services to members with different interests, including teaching, research and practice-based interests.</p> <p>Example/quick idea: Our outreach and support for research-focused scholars is strong. The division website provides a syllabus repository for methodology courses. We also provide members interested in opportunities to teach and mentor students through our “Ask the Experts” sessions, the general menu of PDW offerings, as well as our listserv. Collaborations with the Center for Advancement of Research Methods also provide a platform for teaching others about methodology.</p>	X		
<p>19. Services to members extend beyond those provided at the annual meeting.</p> <p>Example/quick idea: As noted elsewhere, the division has a particularly strong set of virtual conference activities. The include our virtual Consortium as well as the listserv and website resources. In order to better serve our members, we introduced a Doctoral & Jr. Faculty Consortium, which runs during the summertime prior to the AoM conference. The Consortium spans several weeks, with guest speakers in Macro, Micro, and Qualitative tracks (in order to more explicitly serve our macro and qualitative members). The Consortium involves online speaker panels followed by question and answer sessions, and is heavily subscribed by our international members.</p>	X		

<u>Programs/Activities (continued)</u>	<i>Yes</i>	<i>Yes, but needs improvement</i>	<i>No</i>
<p>20. The division/interest group carries out regular communication with members (minimally including a newsletter and up-to-date website).</p> <p>Example/quick idea: The division communicates with members regularly through our newsletter. We also regularly update the division website with announcements related to elections, opportunities for members, and an ongoing crowdsourced “methods chest” that helps researchers identify appropriate survey materials for their research. To enhance communication with members, we have upgraded our website (http://rmdiv.org/). The website includes information about division business (the summer RMD Consortium, elections, awards) as well as resources (syllabi for research methods courses, description and instructions for how to join the active RMNET listserv, and the Measures Chest).</p>	X		
<p>21. The division/interest group actively works to build community (communities of practice, listservs, collaboration activities, social and special events) etc.</p> <p>Example/quick idea: While the division makes regular efforts to build communities involving members, we feel this is an area where we could do better. Survey data suggest that the PDWs and Listserv are very popular with members. We believe that we can build on this area of strength by increasing the breadth of information on the website, finding new methods to maintain contact with members, and offer a continually evolving body of information regarding research methodology.</p>		X	
<p>22. The division/interest group actively strives to improve the annual meeting program by periodically reviewing program statistics to monitor meeting trends.</p> <p>Example/quick idea: The division collects survey data from participants in our PDW events, which is compiled by student volunteers and shared with the executive committee. Attendance at these events is also closely tracked and used to identify areas that are of particular interest to our members. Information related to the annual meeting program activities is reported at the business meeting at the annual conference.</p>	X		
<p>23. Collaboration exists with other division/interest groups in the Academy.</p> <p>Example/quick idea: As a service division, we strive to incorporate perspectives from multiple divisions and interest groups. The great majority of our symposia are co-sponsored with other divisions. Our paper sessions and other division activities also incorporate research being done across multiple areas of the Academy.</p>	X		