

**Strategic Review of the
Operations and Supply Chain Management Division
of the
Academy of Management**

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1. EXECUTIVE SUMMARY: STATE OF THE DIVISION

The Operations and Supply Chain Management (OSCM) Division seeks to promote the significance of operations and supply chain management topics, develop members' capabilities for research and teaching on these topics, and provide networking and professional development opportunities for its members. The OSCM Division has undertaken its 5-year strategic review, which we present with this report. First, we briefly summarize the Division's current state including its achievement of past goals, financial standing, and potential challenges. Second, the report outlines OSCM's 3-year strategic plan. Third, we conclude with a discussion of innovations and best practices from which other divisions may benefit.

A. Summary of Past Achievements

With the prior strategic review report submitted in 2017, the OSCM Division laid out an ambitious set of goals/actions along the dimensions of Governance, Membership, Communications, and Conference. We are pleased to report that significant progress was made against those goals. Below, we highlight some, but not all, of our major achievements over the preceding five years.

2017 Goals/Actions	Accomplishments
Governance: Consider developing our own bylaws and/or affirm that we are simply going to adhere to AOM's bylaws.	<ul style="list-style-type: none">• The OSCM Division ratified its own bylaws in 2021.
Governance/Membership: Institute an annual review of the following metrics (relative to AoM): Membership growth, New members, Submissions, Conference Attendance, Reviewers, Cross-functional/Co-sponsored PDWs, and Finances/pledges/balance.	<ul style="list-style-type: none">• Developed a spreadsheet to track membership, conference participation, financials, and communications.• Progress on the aforementioned metrics is now shared at the annual Business Meeting and in our Division newsletter.
Membership: Develop formal new member programming at the conference. Considering funding a "free" activity for new members at every conference, organized and advertised by the new member committee.	<ul style="list-style-type: none">• Developed a New Member Brochure for dissemination, since 2018.• Established a New Member Committee in 2019.• Planned a New Member Café in 2020, which was ultimately not held due to the move to a virtual meeting. Held a Virtual New Member Café in 2021 and plan to continue.• To promote the OSCM Division to early-career members, a scholarship was provided to the participants in the 2021 doctoral & junior faculty consortium.
Membership: Strengthen ties with the two journals in our field on the UT-Dallas and/or SCM Journal List that do not have natural ties to other conferences (JOM and JSCM).	<ul style="list-style-type: none">• JOM and JSCM now routinely hold business meetings and/or award sessions at the AOM Annual Meeting.• JOM and JSCM frequently sponsor PDW sessions for the Division.• The JOM and JSCM editors, along with those of other prominent journals, are regular participants in the Meet the Editors panel.
Communications: Develop a formal, written "communication strategy". Improve the management and dissemination of knowledge about our "opt-in" listserv. Be sure all members are aware of its use and their status, and provide clearer link to it on our website.	<ul style="list-style-type: none">• Updated communication mission and goals were presented at the 2018 Business Meeting.• OSCM Twitter account was established in July 2018. Number of international followers has grown to 526 as of January 2022.• In 2018, the website was moved to the new platform, and new content was created.• All OSCM members were invited to Connect@AOM platform in 2018. Average monthly website views increased from 320 (in 2017) to nearly 1113 (in 2021). Number of discussion postings increased from 66 (in 2017) to 175 (in 2021).

2017 Goals/Actions	Accomplishments
	<ul style="list-style-type: none"> In 2019, we launched the OSCM Division “Listen to the Editors” podcast where journal editors are interviewed and unveil trends in Operations and Supply Chain Management research. Thus far, ten episodes have been recorded.

B. Current State of OSCM Division

AOM and the OSCM Division track metrics along the dimensions of membership, Annual Meeting participation, and finance. Tracking such metrics affords the Division insight into trends that highlight strengths of OSCM or areas in need of development. Below, we summarize some salient trends (2017-2021) and briefly discuss their implications for the Division.

Membership		
Metrics	Division Strengths	In Need of Development
Average Annual % Change in Membership <ul style="list-style-type: none"> US: OSCM = -5.49% vs. AOM = -4.42% Int'l: OSCM = -2.54% vs. AOM = -0.43% 		From 2017-2021, OSCM's membership has dropped more precipitously than has AOM's as a whole. This is most notable for international membership and primarily occurred in 2021.
Average Annual % Change in New Members: OSCM = 10.67% vs. AOM = -10.97%	OSCM has successfully drawn in new members whereas AOM as a whole has experienced a decline in the number of new members. 2021 was particularly strong in this regard for the OSCM Division.	
Annual Meeting Participation		
Metrics	Division Strengths	In Need of Development
5-Yr % Change in Scholarly Submissions (papers + symposia): OSCM = -13.0% vs. AOM = -17.8%	OSCM's decline in scholarly submissions was not as severe as AOM as a whole. This decline occurred entirely in 2021 whereas a steady increase in submissions occurred in 2017-2020.	
% Change in Annual Meeting Registrations 2017-2019 vs. 2020-2021 <ul style="list-style-type: none"> US: OSCM = -33.8% vs. AOM = -30.1% Non-US: OSCM = -15.4% vs. AOM = -1.2% 		In terms of Annual Meeting registrations, OSCM was hit harder than AOM as a whole during the “Covid years”. The gap is mostly due to OSCM's larger drop in non-US registrants.
Average Annual Meeting Reviewers as % of Membership: <ul style="list-style-type: none"> US: OSCM = 21.2% vs. AOM = 31.2% Non-US: OSCM = 36.1% vs. AOM = 39.3% 		On average, OSCM's membership is not as engaged in the reviewing process as is AOM's membership as a whole. The gap exists for both US and non-US members.
Finance		
Metrics	Division Strengths	In Need of Development
Carry Forward Cash Balance steadily increased from \$18,352 in 2017 to \$97,922 at the end of 2020.	Prudent use of OSCM's funds along with successful fundraising campaigns have left OSCM in a strong financial position.	

	This position will be leveraged to deploy financial resources in support of the Division's Goals as outlined later.	
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C. Potential Challenges

The OSCM Division has made significant progress over the preceding five years, and we believe that the strategic plan outlined in the following section will facilitate its continued development. However, it is prudent to consider challenges and obstacles that hold the potential to disrupt progress towards achieving our goals. The first such challenge will be leadership transition. We currently have a strong team in place, including some executive committee members who are early in their tenure. For this reason, we don't have any specific concerns in this regard. Yet, the combination of some members completing their term and our goal of expanding volunteer opportunities, makes it imperative that we continue to strengthen our governance structure. This need is reflected in Section 2A below.

Next, we must recognize the potential challenges that the Covid-19 pandemic will continue to present around the globe. In order to overcome these possible obstacles and also deepen our engagement with non-U.S. members, we are proposing to add region-specific membership committee members (i.e., Ambassadors) who will coordinate virtual events for their region throughout the year (see Sections 2A and 2B).

Finally, the OSCM Division continues to face competition from other leading conferences in the operations and supply chain domain. Tightening institutional funding for travel may make this competition more acute. To address this, it is incumbent upon OSCM's leadership to maintain and strengthen ties with high quality journals and professional societies (both industry and academic). Other initiatives to differentiate the AOM conference and make it the conference of choice for leading OSCM scholars should be considered.

2. 3-YEAR STRATEGIC PLAN: 2022-2025

In what follows, we outline the OSCM Division's 3-year strategic plan. The goals and activities specified in this plan are the result of extensive review and discussion of three sources of input: 1) The OSCM Division and AOM at large key metrics over the preceding 5-year period, 2) The OSCM 2021 Division Health and Governance Checklist, and 3) The feedback received with the OSCM Division's 2021 Membership Survey. The Division's goals span the areas of governance, membership, programming, and communications.

A. Governance

Effective governance ensures that the OSCM Division's operations are conducted in a consistent, fair, and transparent manner. It covers items such as organizational structure, Division officer elections, processes for ex-officio appointments and selection of committee members, criteria and procedures for Division awards, etc. The OSCM Division has the following 3-year goals to advance governance effectiveness. The goal related to increased opportunities for involvement was derived from the OSCM 2021 Membership Survey, in which members expressed a desire for more of these opportunities (Q17 and Q18). Observations from the current executive team led to our second goal.

Goals	Responsibility	Activities	Timeline / Rollout Plan	Assessment Criteria
Enhance opportunities for involvement with the Division	Coordinated by Division Chair and Past Chair (all committee members contribute)	<ul style="list-style-type: none"> • Fill Secretary position • Fill Membership Committee leaders from each region (Advertise this year for Ambassador roles in Asia, Australia, South America) • Fill Communications Specialists positions for each different communication medium (LinkedIn, Twitter, AOM OSCM website, etc.) 	Open positions will be defined in time for promotion at the 2022 Annual Conference, and filled by January 2023.	<ul style="list-style-type: none"> • Increase in number of roles involving community • Satisfaction of membership with opportunities for involvement
		<ul style="list-style-type: none"> • Promote DEI within the Division. In 2022 we have planned a PDW (Barb Flynn) and social event (Lisa Ellram and Wendy Tate) centered on DEI issues. 	Enhanced DEI initiatives are starting in 2022 and will be an ongoing/continuous effort.	<ul style="list-style-type: none"> • Increase diversity of membership and in those serving in Division committee roles
Formalize the structure of executive committee roles and responsibilities	Coordinated by Division Chair and Past Chair (all committee members contribute)	<ul style="list-style-type: none"> • Make better use of our central repository for documents. • Develop “Role and Responsibility” documents for each executive committee position to aid in transitions. • Develop “Role and Responsibility” for existing and new committee positions to be clear about expectations and goals. • Standardize timeline of meetings throughout the year, required attendees. 	Completed by 2023 Annual Conference.	<ul style="list-style-type: none"> • Satisfaction of those involved with Division activities • All documents developed and maintained in central repository for access by committee members.

B. Membership

The members are the lifeblood of the OSCM Division. As such, activities geared toward drawing in new members and ensuring that existing members are satisfied with their membership in the OSCM Division are vitally important. To that end, the OSCM Division has the following 3-year goals. Goals related to international membership are driven by the substantial drop in this membership base last year, -12.7%, as well as a relatively low score on our efforts to reach out to international members per the OSCM 2021 Membership Survey (Q14). Goals related to students and early career faculty are meant to continue capitalizing on the good membership numbers and growth we observe in this category.

Goals	Responsibility	Activities	Timeline / Rollout Plan	Assessment Criteria
Attract more international members	Communications coordinator and membership committee	<ul style="list-style-type: none"> Publicly announce call for volunteers to expand membership committee to five members, with regional ambassadors from each continent (as noted under A Governance) 	Open volunteer positions will be defined in time for promotion at the 2022 Annual Conference, and filled by January 2023.	<ul style="list-style-type: none"> No. of ambassadors in place
		<ul style="list-style-type: none"> Regional ambassadors will be responsible to host one content-driven virtual event per year in their region, promoted via our OSCM website Strengthen ties with regional Associations and our established partners, such as JSCM, who are already holding such virtual events (i.e., advertise such events, help in providing content) 	<p>Regional ambassadors will develop a detailed plan for virtual events in 2023, with a target to begin executing on these events in 2024.</p> <p>Ties with Associations and journals represent an ongoing effort.</p>	<ul style="list-style-type: none"> No. of international members No. of virtual sessions organized in different regions
Enable (early-career) faculty to expand their professional network	Doctoral and Junior Faculty Consortium Co-Coordinator and New Membership Committee	<ul style="list-style-type: none"> Regional virtual events (see above) Doctoral and Junior Faculty Consortium reunion session after 6 months (both content and social/networking) 	Regional virtual events (as above) and Consortium reunion sessions anticipated for 2023.	<ul style="list-style-type: none"> No. of networking sessions and No. of attendees per session No. of PhD students and junior faculty members
		<ul style="list-style-type: none"> Enhanced funding opportunities for consortium attendees 	Funding opportunities each year as permitted by fundraising efforts.	<ul style="list-style-type: none"> US\$ committed to scholarships.

C. Programming

Members rely on the OSCM Division to offer programming which will facilitate the development of their research and teaching capabilities as well as expose them to emerging research topics. Moreover, the opportunities for members to socialize, interact with like-minded operations and supply chain scholars, and build their professional network are significant attractions to the Division. To continue to improve the value of an OSCM membership, the Division has the following 3-year programming goals. Our goal related to increased connections to other divisions was developed based on low scores related to this facet as reported on the OSCM 2021 Membership Survey (Q14). We also received feedback related to both goals on the open-ended questions of the survey – what members would like to see improved (Q17), what should occupy the division’s time over the next 5 years (Q18), and what the division can do in the short run to increase effectiveness (Q19).

Goals	Responsibility	Activities	Timeline / Rollout Plan	Assessment Criteria
Increase connections with other AOM divisions	PDW Chair and Program Chair	<ul style="list-style-type: none"> Proactively develop PDWs that are co-sponsored by other divisions by leveraging personal networks and identifying and requesting participant from scholars who are multi-disciplinary Advertise plenaries across other divisions Cluster and advertise paper session content to attract members from other divisions. 	All efforts are ongoing each year.	<ul style="list-style-type: none"> No. of co-sponsored PDWs No. of secondary members to the division
Increase connections to industry	PDW Chair and Program Chair	<ul style="list-style-type: none"> Develop PDW, plenary, and other content that brings in more industry partners ASCM involvement; session on research grants (either at conference or virtual session) Bring back the local plant visits once the pandemic allows for it (hopefully 2023) 	<p>Industry-engaged PDW and plenary efforts are ongoing each year.</p> <p>ASCM session and plants visits are targeted to commence with the 2023 Annual Conference.</p>	<ul style="list-style-type: none"> Satisfaction of members on value offered No. of sessions with practitioners or industry organizations as key participant No. of members participating in plant visits

D. Communications

Effective communication is critically important to member engagement. Members rely on the OSCM Division for information on AOM programming, opportunities to become more involved with the Division, career opportunities, research initiatives, and other scholarly activities occurring in our profession. Thus, it is imperative that the OSCM Division not only communicates with its members in a broad and timely manner, but also provides the platforms for members to communicate effectively with one another. The OSCM Division has the following communications-related goals for the next 3 years. Our goal related to Communications was developed based on responses to the OSCM 2021 Membership Survey; specifically, low relative scores were received pertaining to opportunities outside of the annual meeting to network and collaborate with peers (Q14).

Goals	Responsibility	Activities	Timeline / Rollout Plan	Assessment Criteria
Increase communication and interaction with our OSCM members throughout the year	All committee members & Communications Coordinator	<ul style="list-style-type: none">Identify potential social media channels to consolidate and expand our outreach (beyond Connect@AOM and Twitter)Publicly announce call for volunteers and recruit social media team members with representatives for each channel	Open volunteer positions will be identified and defined in time for promotion at the 2022 Annual Conference, and filled by January 2023.	<ul style="list-style-type: none">Traffic via social media channels (incl. Connect@AOM)Member satisfaction with communication
		<ul style="list-style-type: none">Create new Listen to the Editors podcasts – or host live Listen to the Editors sessions throughout the year (may also connect to the regional sessions, see Membership)Send more direct member emails via Informz platform from our executive team (see examples other divisions)	Involve newly appointed communications volunteers and regional ambassadors in developing a detailed communication plan in 2023, with ramp-up of activities anticipated for 2024, 2025.	<ul style="list-style-type: none">No. of podcastsNo. of direct member emails via Informz platformMember satisfaction with communication

3. INNOVATIONS AND BEST PRACTICES

The OSCM Division has instituted several excellent practices in prior years. However, we believe that there are three that stand out as exemplary and could be shared with other DIGs:

- As an investment into the future of the Division, and our professional community more generally, we have strategically focused on early career members. A central element of this

strategy has been the development of an excellent doctoral and junior faculty consortium. We can confidently say that our consortium stands apart from consortiums at other conferences in our field. Of particular note are the research breakout sessions, wherein small groups of students and junior faculty discuss their research with senior scholars in the field. These sessions both help to develop early career members' research programs, as well as create important networking opportunities with key members of the community. To deepen this commitment in 2021, the executive committee decided to leverage our strong financial position to greatly enhance the financial support for student attendance and the doctoral student best paper award.

- In our 2017 strategic review, we identified an opportunity to strengthen ties with two highly-respected journals in our field that did not have “natural” tie-ins at other conferences – namely, JOM and JSCM. Over the preceding five years, these two journals have become central components of the OSCM program at the Annual Meeting by: holding their annual business meetings, hosting award sessions/socials, sponsoring PDWs, and participating in editors' panels. Their engagement at the Annual Meeting has been instrumental to drawing in new members (including well-recognized thought leaders) and in the OSCM Division solidifying its position as a home for empirically focused OSCM scholars.
- To meet the needs of our diversifying membership, the OSCM Division routinely hosts a “Women in OSCM” Café at the Annual Meeting. This event has brought together members of the community to highlight and discuss key issues facing female faculty in the field and provide an important support system for them in our community. In the years to come, we plan to expand this into a broader diversity, equity, and inclusion (DEI) initiative. Here, we seek to foster discussion among faculty, department chairs and deans on how we together can create a more diverse, equitable and inclusive environment for ourselves, our students, and our colleagues.