Academy of Management

Management Spirituality and Religion Interest Group

Five-Year Review – February 2018

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And the qualitative analysis of 652 membership survey verbatim by
MSR 2017 Most Promising Dissertation award winners

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Summary

Executive summary and document plan

The AOM Management Spirituality and Religion (MSR) Interest Group is thriving, with a highly engaged leadership team and increasingly engaged membership. With this five-year review, we would like to take the opportunity to clarify and assert the contribution MSR and its members have within the Academy.

The five-year review team developed a more extensive document than is required. It did so because MSR may wish to apply for divisional status in the next couple of years and believes that the more extensive report is especially valuable to the interest group membership and will be a good step forward if it does decide to apply for divisional status. Though the report is long, we hope the many graphs and spaced layout will enable the review committee a quick reading and understanding of AOM / MSR metrics' comparisons, quantitative and qualitative membership survey results and the corresponding analysis, strategic orientations and actions to advance service to our membership.

MSR looks forward to future conversations with AOM DIGR about applying for divisional status, reasonably soon if the MSR community confirms it wishes to do so.

MSR has been in existence for more than 15 years as an interest group and currently has a stable and engaged membership and a well-structured governance as covered in this review. In 2001, MSR began as a totally novel field of management research and teaching; it is now increasingly acknowledged in academia and in business and partners regularly with other AOM divisions.

The existence of MSR has possibly contributed to - and at a minimum illustrates - the emergence of new intentions expressed through the Academy annual conference themes (Doing Well By Doing Good, Dare to Care, West meets East: Enlightening, Balancing, and Transcending,

Making Organizations Meaningful, Improving lives,…). More than ever, in a world constantly disrupted by environmental, economic, technological and societal transformations, the work MSR undertakes along with sister AOM divisions and external organizations speaks to the Academy's purpose and relationship to society.

MSR has benefited from actions following the requests expressed in the 2012-member survey and by AOM DIGR, consequentially enhancing its activities, with examples such as:

- The creation of a full-day Research Consortium at AOM, the day before the Academy PDW sessions, with external guest speakers, senior researcher panelists, publishing workshops and networking opportunities. These research consortium meetings have enabled us to move some previous PDW-type sessions to the consortium day, freeing up PDW time and increasing participation in those sessions. They have also provided extensive time to bring members together to understand and create the MSR field of study. We believe this is valuable in supporting research by doctoral students and established faculty in this field.

- The MSR spiritual scholarship retreat follows every annual AOM conference since the creation of MSR in 2001. The underlying thesis of the annual retreat as it began with the support of the late André Delbecq, is that we should *"practice first person what we teach and research"* in the arena of spirituality to advance the work of MSR. For the past 3 years, the retreat has been enhanced with half-day MSR research scholarship workshops enabling members to build projects sharing interests and access to empirical fields. Several have resulted in accepted AOM paper and PDW submissions and journal publications.

- A mentoring program with an executive special advisor was initiated in 2016, providing research and publishing competency development to support students and faculty.

- MSR plenaries have focused on bringing together transdisciplinary scholars that integrate the themes of Spirituality, Faith or Religion into their research and practice. In the Vancouver 2015 plenary a panel of AOM past presidents spoke from the heart and soul about global unsustainabiliy; the Anaheim 2016 plenary focused on personally inspiring scholarship journeys contributing to the creation of meaningful organizations; the Atlanta 2017 plenary brought together activist academic and special guests grappling with the challenges of societal change, invited and facilitated by Jim Walsh.

- Because the themes developed within MSR resonated with their research, values and interests, renowned scholars have supported MSR in the past five years, presenting at the Research consortiums, MSR Plenaries, Scholarly papers, Symposia and PDW sessions such as (this list is not exhaustive):
  - Nancy Adler
  - Brad Agle
  - Ramon J. Aldag
  - Jay Barney
  - André Delbecq
  - Ed Freeman
  - David Korten
  - Ian I. Mitroff
  - Robert Quinn
  - Denise M. Rousseau
  - Otto Scharmer
  - Ed Schein
  - Peter Senge
  - Kathryn Schuyler
  - Anne Tsui
  - Rosalie L. Tung
  - Sandra Waddock
  - James P. Walsh

During the 2015 to 2016 timeframe, the MSR Executive committee doubled the number of monthly meetings; upon guided reflection the second meetings focused on shared purpose and MSR's mission and vision. After a year of meaningful conversations these resulted in a highly aligned team, a clear sense of purpose and identity within the Academy and society, stronger than ever PDW and Scholarly programs as well as several foundational research papers clarifying the history of MSR and its field of research. The Domain Statement was reviewed at that time and MSR's vision and mission were formulated in alignment with those of the Academy.

We will start with the MSR Domain statement, vision and mission, then detail the activity metrics per AOM categories and the analysis of our members' feedback from the 2017 survey. Throughout the analysis we will point towards needed actions before concluding with strategic priority orientations and actions in specific areas and their expected outcomes.

AOM has been very helpful to us again and again during this review process and in all other activities MSR and its officers have needed to deal with. We want to say thank you, to the DIGR and especially to Kerry Ignatz who has been extremely customer focused, invariably responsive and available adding to that being always gracious and smiling. Thank you.

Throughout this review, we wish the DIGR a meaningful and interesting discovery of our interest group.

MSR domain statement: *"MSR explores how spirituality and religion can influence organizational dynamics and affect management outcomes. In that regard, MSR is devoted to defining the relevance and impact of spirituality and religion in management, organizations and society. Major areas of study include theory building and empirical research around the issues of faith, spirituality, and religion as they influence principles and practices in management. Important contributions have been made in MSR research to better understand the meaning of work, the impact of spirituality and spiritual leadership in the workplace, the purpose of business, the effects of religious pluralism in the workplace, and the distinctive elements of individual religious and spiritual beliefs that cultivate inner awareness and promote wisdom for the common good."* Created December 1999; re-approved August 2000; revision approved May 2015.

MSR's vision represents the *what* of MSR's contribution: *"We better society through our scholarship, helping individuals and organizations integrate the spiritual and religious dimensions of human life into management awareness, theory and practice."* MSR's contributions to AOM are 1) its integration of often ignored dimensions of individual spirituality or religion to research in organizational dynamics and management practices and 2) its explicit focus on religions, spiritual traditions, and institutions embedding and influenced by those religions and spiritual traditions.

MSR's Mission illustrates *how* to achieve its vision. *"To build a transdisciplinary global network of academics and practitioners by creating shared research and learning opportunities that explore the field of Management, Spirituality and Religion."*

MSR's Moonshot inspired by AOM's 2022 Moonshot

By 2022, MSR will be the acknowledged global community for scholars in Management, Spirituality and Religion, advancing the impact of this field in business and in society. MSR will connect members with one another and build strong partnerships with external institutions through engagement opportunities that bridge geographic and research field boundaries. MSR will provide added value to a highly diverse membership through member services, interactive communities, and a dynamic governance. It will advance knowledge creation and dissemination in the field of Management, Spirituality and Religion for the professional development and success of its diverse stakeholders. MSR will welcome and champion Management, Spirituality and Religion scholars and practitioners from every tradition, origin and culture.

Membership Strength and Characteristics

Following a 16 % membership decrease between 2012 and 2013, MSR has stabilized its membership over the past 5 years, increasing 2 %, while AOM membership has increased 4 %.
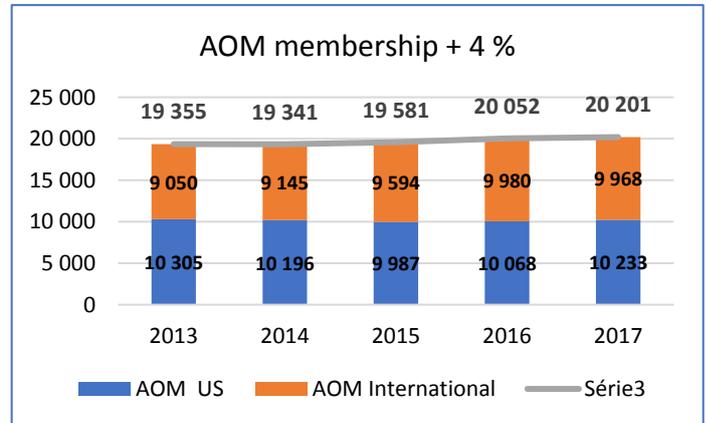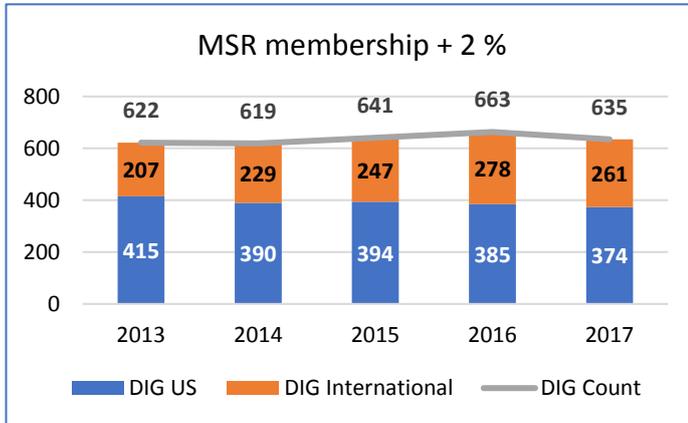
MSR's membership geographic distribution is 59 % US and 41 % outside of the US, while AOM has 51 % within the US and 49 % outside the US. Over the past five years MSR geographic trends have changed significantly. MSR US membership has decreased 11 %, while AOM decreased 1 %; MSR membership outside the US has increased 26 %, in distinct contrast to the AOM increase of 10 %.

MSR US and Outside US as % of membership

	2013	2014	2015	2016	2017
MSR Outside US as %	33%	37%	39%	42%	41%
MSR US as %	67%	63%	61%	58%	59%

AOM US and Outside US as % of membership

	2013	2014	2015	2016	2017
AOM Outside US as %	47%	47%	49%	50%	49%
AOM US as %	53%	53%	51%	50%	51%
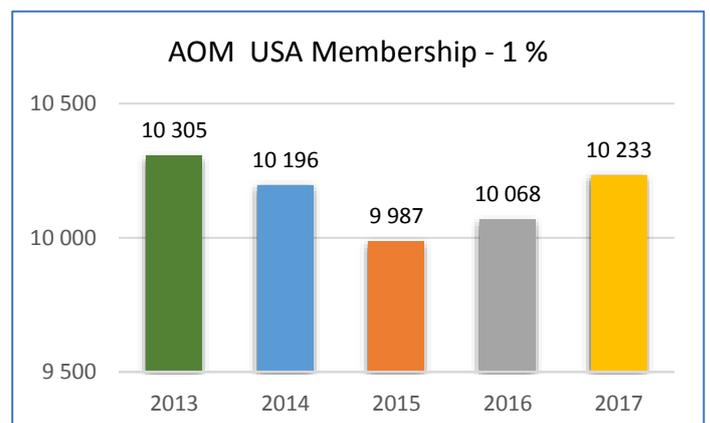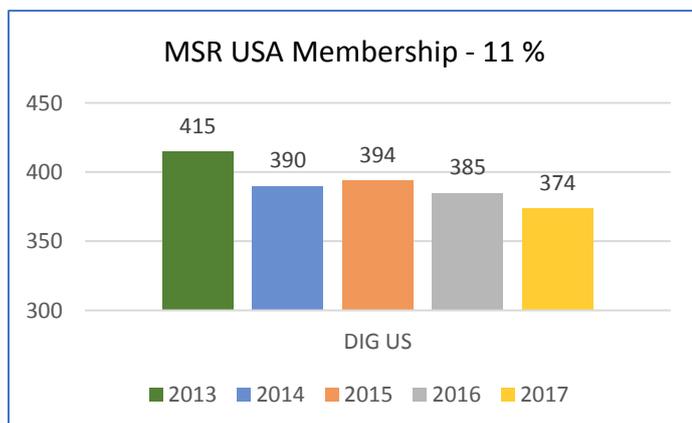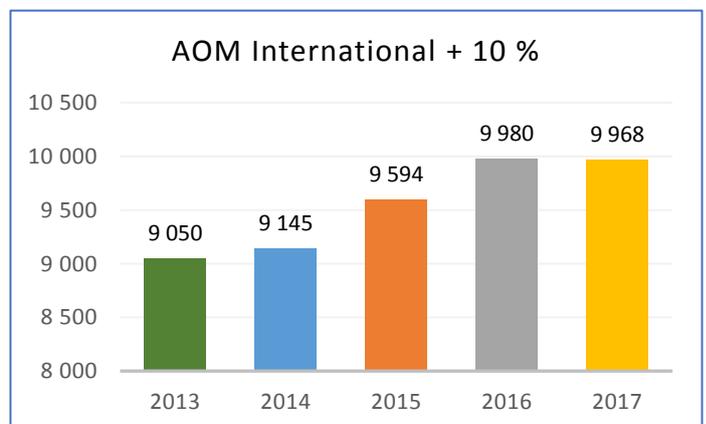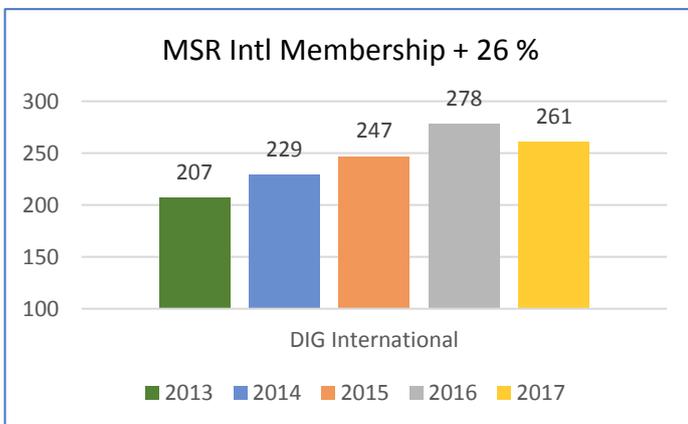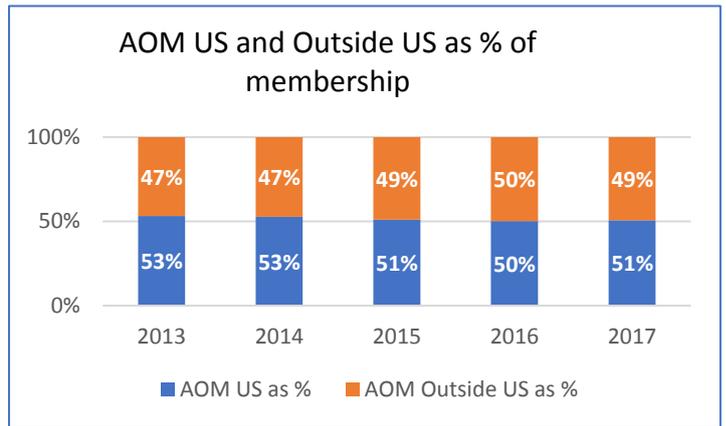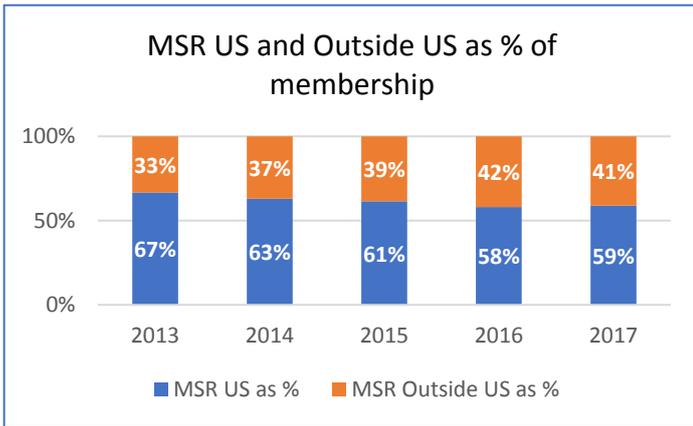
We are delighted to observe the dramatic increase of international membership. We have worked on growing that membership by such activities as increasing MSR's visibility at regional conferences of the International Association of Management Spirituality and Religion (IAMSR) listed in annex 4. These regional conferences demonstrate MSR's potential to be part of the AOM "global network of management" and to contribute to the AOM Specialized Conferences Initiative. This trend in International membership also brings the MSR membership into alignment with AOM's commitment to increase international membership.

Evolution of membership by type and by location

MSR US membership by type

	DIG US ACAD	DIG US EMER	DIG US EXEC	DIG US STU
2017	267	16	34	57
2016	270	18	34	63
2015	259	14	49	72
2014	264	12	42	72
2013	267	10	42	96

MSR membership outside US by type

	DIG INTL ACAD	DIG INTL EMER	DIG INTL EXEC	DIG INTL STU
2017	188	3	15	55
2016	200	2	20	56
2015	175	3	22	47
2014	163	3	24	39
2013	149	3	22	33
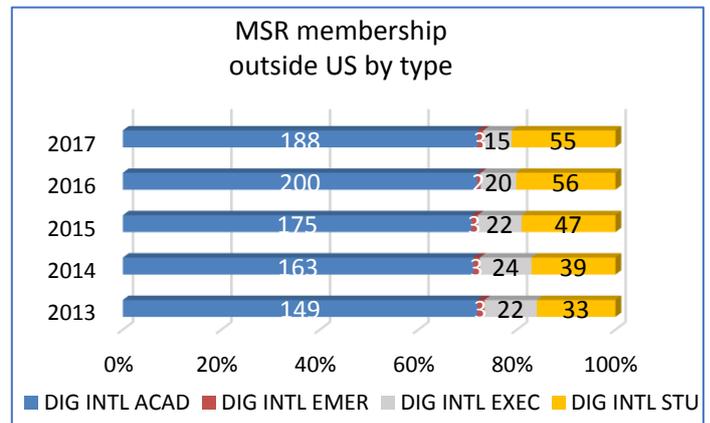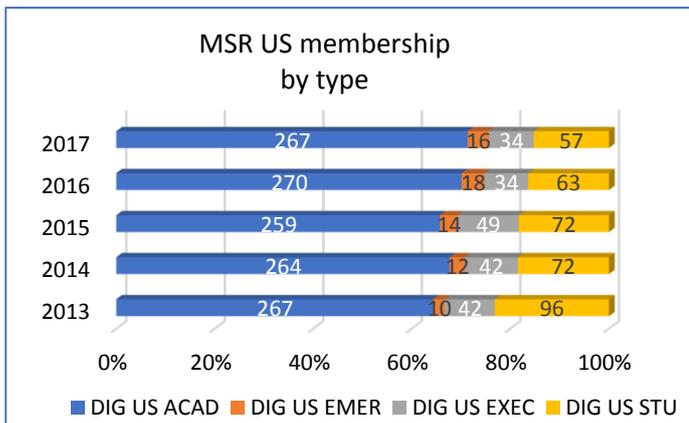
Academic membership represents 72 % of MSR (AOM = 67 %) and is growing 9 % (AOM + 6 %); it is flat in the US and growing 26 % outside the US. Students represent 17 % of MSR membership (AOM = 24 %). Opposing geographic trends concern MSR student membership, decreasing 40 % in the US (AOM - 10 %) and increasing 67 % outside the US (AOM + 23 %) in this five-year timeframe. These statistics may reflect a greater attention to spiritual, religion and community-oriented themes among academic faculty in countries outside the U.S.

Over the last 5 years MSR Executive membership has declined by 2 percentage points, from 10 % to 8 % of total membership (AOM - 1% of total membership, from 7 % to 6 %). This MSR trend is one that needs to be curbed. Developing ways for MSR research to be transferred into teaching and practice is one of the Executive Committee's goals. MSR Emeritus membership increased from 2 % to 3 % of total membership (AOM + 0.3 % of total membership, from 1.7 % to 2 %). This trend may be due to the MSR founding generation retiring.

In summary, MSR has a strong academic and student base representing 90 % of its total membership and is attracting members from outside the US at a growth rate of 26 %, while decreasing by 10 % in the US. As MSR is a place to explore new management research dimensions, this may partially explain the geographic dynamics, though the strong decrease of student membership is a concern. MSR student members transfer to academic membership once their Ph.D. is defended, but the trend fails to show student membership renewal at a pace close to the attrition rate. Investigating this situation and reversing the decline is a 2018-2019 priority. As the interests of MSR have spread within the Academy, MSR is less a unique arena in which to pursue these themes. We want to reach out to new students and hold on to them longer by creating a community they can relate to, developing the mentorship program and providing easy access to essential research information. We have created a student membership executive position as well as a student committee to address these needs (see strategic orientations and actions section page 31).

Shared memberships across AOM divisions

As illustrated on the following page, MSR members mainly share their membership with Academy divisions focused on Organizational research (Organizational behavior, Organization Development and Change, Organization Management theory), Social Issues in Management, Management Education, Strategy and Diversity.

MSR's proximity with the most prominent AOM divisions is demonstrated by hundreds of shared MSR memberships indicating that the MSR field complements other more mainstream scholarship domains. The Interest Group often represents a supporting division providing individuals an opportunity for cross disciplinary work. MSR in this way is one of the AOM "homes" for a number of main AOM divisions' members.

Shared memberships across AOM divisions at a glance

MSR membership in other main DIGs

Legend:
- Organizational Behavior
- Social Issues in Management
- Management Education and Development
- Organization Development and Change
- Organization and Management Theory
- Human Resources
- Strategic Management
- Gender & Diversity in Organizations
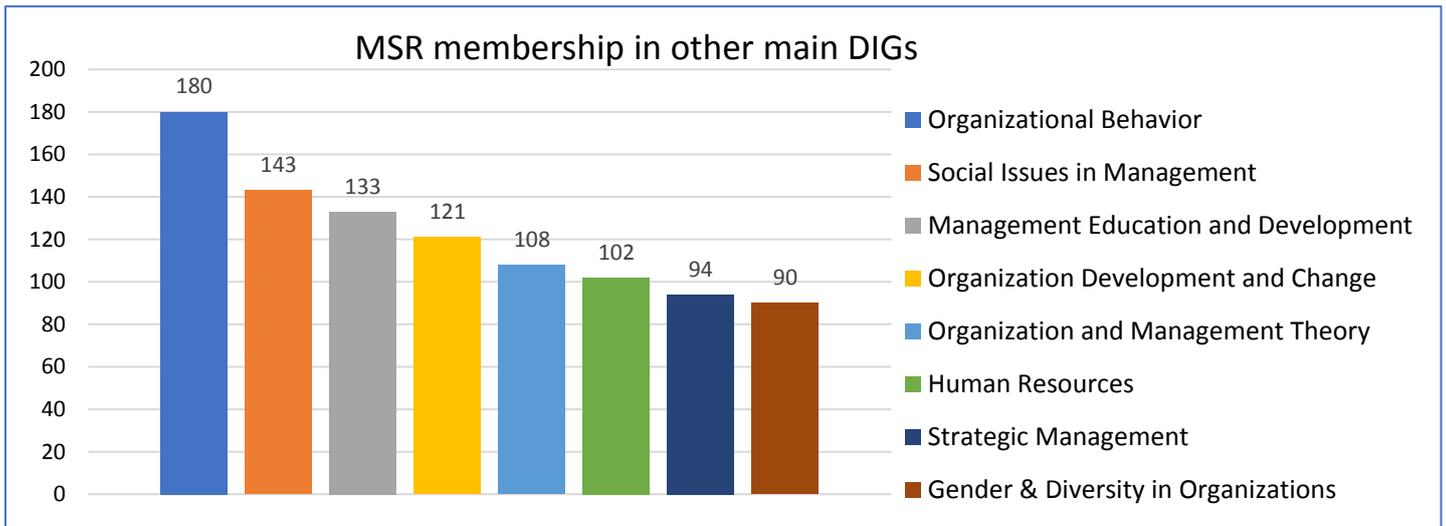
Total Members as of Dec. 28th 2018	576		
Division Title	**Count**	**% MSR members**	**Bracket**
Organizational Behavior	180	31%	
Social Issues in Management	143	25%	
Management Education and Development	133	23%	
Organization Development and Change	121	21%	15 to 30 %
Organization and Management Theory	108	19%	
Human Resources	102	18%	
Strategic Management	94	16%	
Gender & Diversity in Organizations	90	16%	
International Management	82	14%	
Entrepreneurship	78	14%	10 to 14 %
Management Consulting	70	12%	
Research Methods	69	12%	
Critical Management Studies	52	9%	
Organizations and The Natural Environment	47	8%	
Managerial and Organizational Cognition	46	8%	
Public and Nonprofit	43	7%	
Strategizing Activities and Practices	42	7%	below 10 %
Technology & Innovation Management	40	7%	
Careers	37	6%	
Management History	34	6%	
Conflict Management	28	5%	
Health Care Management	25	4%	
Organizational Communication & Information Systems	24	4%	
Operations and Supply Chain Management	16	3%	

AOM conference registration

MSR conference registration is constant over the 5-year period with minor variance based on venue location and member geography of origin. One can observe a somewhat consistent 5 % to 10 % gap between the AOM average percentage of total membership and that of MSR. This difference could be due to lack of funding as the main reason for not attending.
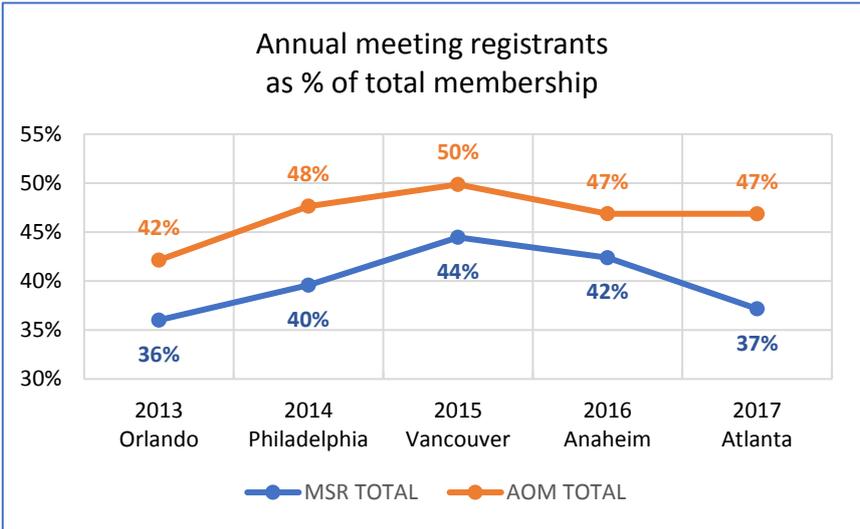
The pattern of annual member registration per year/venue for non-US based membership is remarkable and very similar for both AOM and MSR outside US members.

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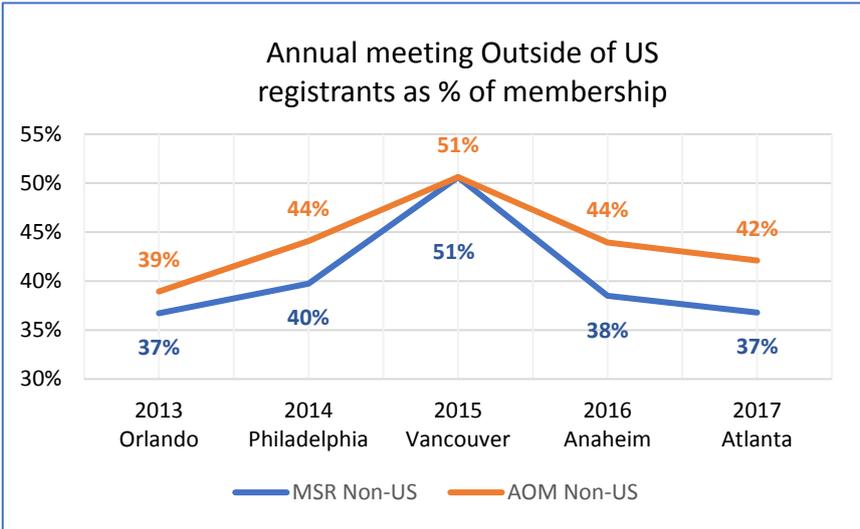
These trends may be influenced by the strong growth of MSR membership outside the US and the relative attractiveness of certain cities where the annual conference takes place.

AOM program submissions

In the past five years, the MSR interest group has seen its submissions increasing by 13 %, peaking at 40% increase in 2016, and its number of reviewers increasing by 62 %. This is the result of activities aimed at stimulating members' participation and engagement in the MSR sessions of the annual conference. We are still far from the AOM average submission ratio and will continue increasing this number through member engagement and research activities covered in the strategic orientations and actions section. We wonder if an emerging field attracts more research consumers than producers, possibly illustrated by the growth in reviewers?
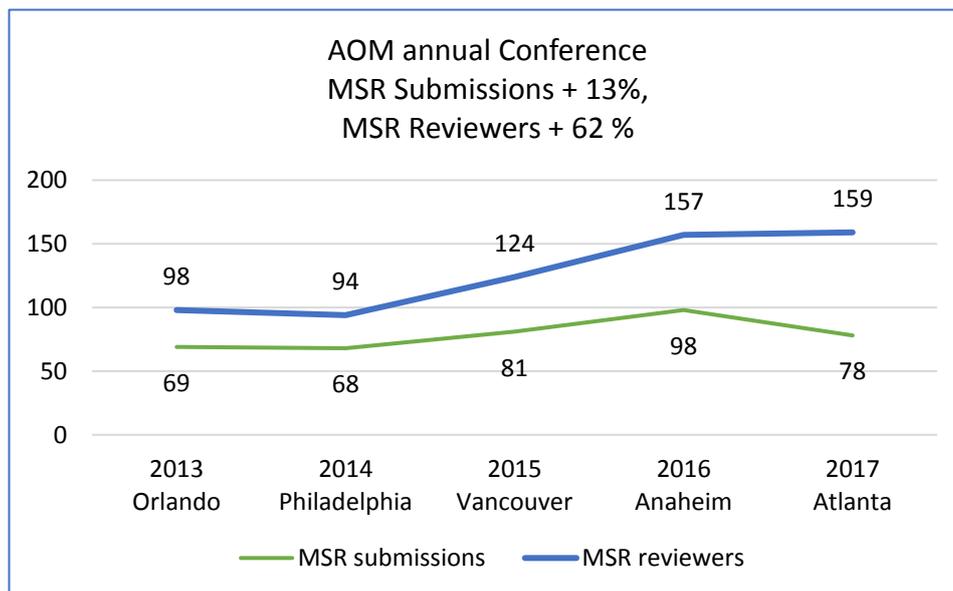
Though less accentuated in 2017, the drop of submissions (- 3%) follows the registration decrease pattern of the previous page (- 5%); again, this may also be due to the venue/theme.

Program acceptance rates
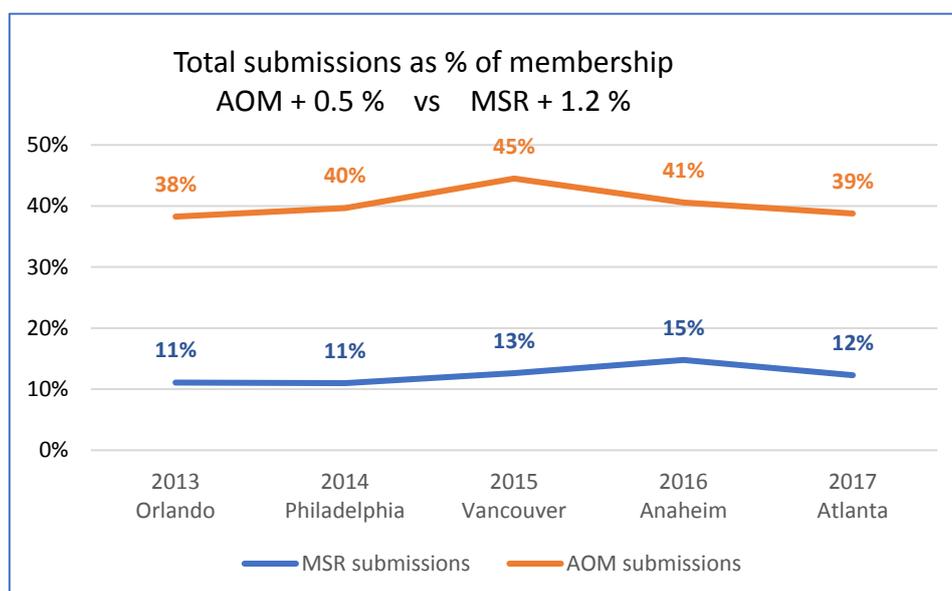
MSR acceptance rates

AOM acceptance rates
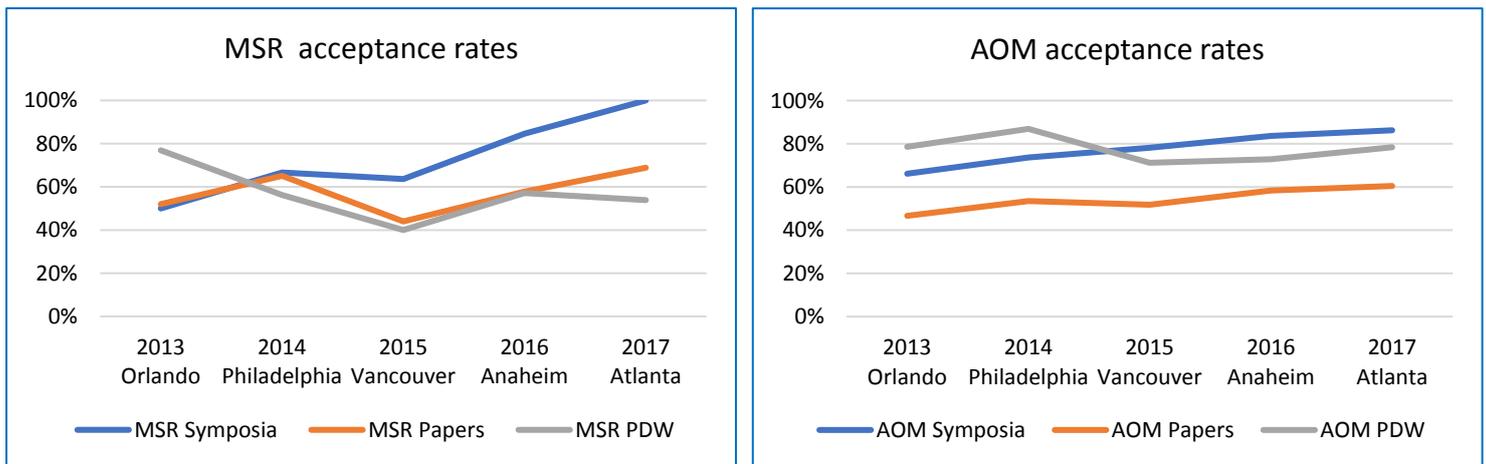
The above graphs indicate that MSR statistics closely track AOM rates over the term 2013 - 2017, which is rather remarkable because none of this is formally intended. One DIG annual rates vary year-by-year due to the annual change in individual chairperson and the prospect for person-to-person differences in judgement. AOM average rates reflect an acceptance rate aver-aged across 25 different chairs, a 'pooling' of judgmental criteria of sorts. MSR PDW submis-sions have increased; the declining acceptance rates may reflect the greater selectivity imposed by the number of sessions the Interest Group is granted. Gaining a better understanding of the Academy's space and time allocation criteria as well as AOM's acceptance rate principles will help the MSR Exec ensure a higher level of consistency from one year to another.

Reviewer activity participation

Reviewers as % of total membership
AOM + 2.8 %   vs   MSR + 9.3 %
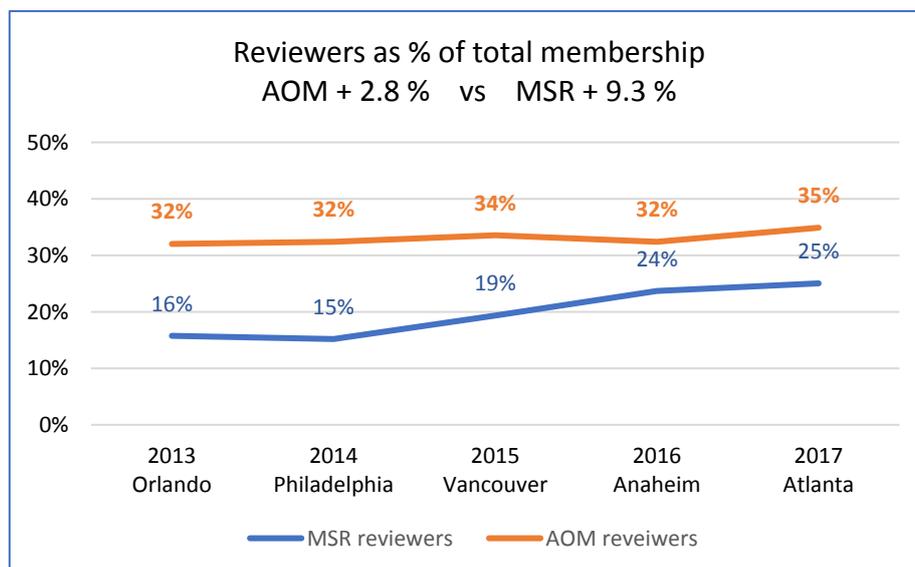
The increase of MSR members' involvement in the review process is notable over the past 5 years. As a percentage of total membership, 9 % more MSR members participate as reviewers compared to 5 years ago, an increase from 16 % to 25 % of total membership. In the same period, AOM reviewers increased 3 %, from 32 % to 35 % of total membership. We have a surplus of reviewers over actual submissions, a strong indication of scholarly interest in developing the DIG field. Colleagues involved in scholarly work with the Academy are showing strong support, as a solid group of reviewers, for future development.

Outside US reviewers as a % of membership AOM + 3.5 % vs MSR + 13 %

Year	2013 Orlando	2014 Philadelphia	2015 Vancouver	2016 Anaheim	2017 Atlanta
MSR Intl	20%	18%	24%	26%	33%
AOM Intl	36%	35%	38%	37%	39%
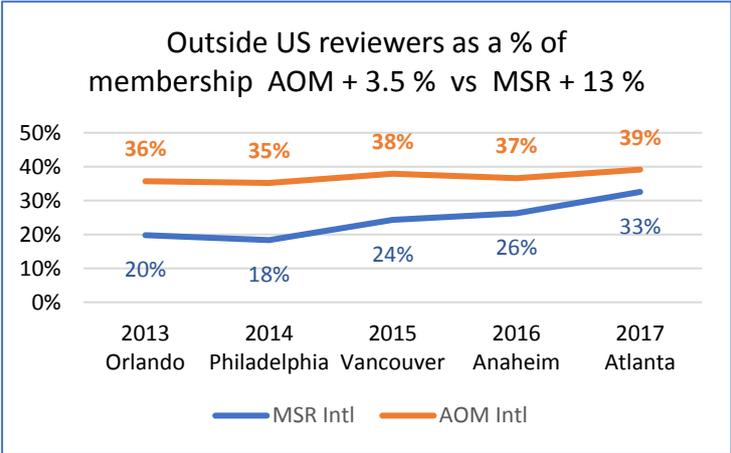
Though rapidly growing, MSR reviewer engagement has yet to meet the AOM average, currently 10 % above MSR. MSR reviewer growth has mainly been due to multiple communications encouraging reviewing activities, the creation of Associate Reviewer roles, supporting reviewer development through Video posts and the Research Consortium. These activities appealed to members abroad; in 2017, 33 % of members outside the US were reviewers.

Elections Participation

Election votes AOM - 4.7 %   vs   MSR + 2 %

Year	2013	2014	2015	2016	2017
% of voting MSR membership	22%	21%	25%	23%	24%
% of voting AOM membership	28%	27%	28%	24%	23%
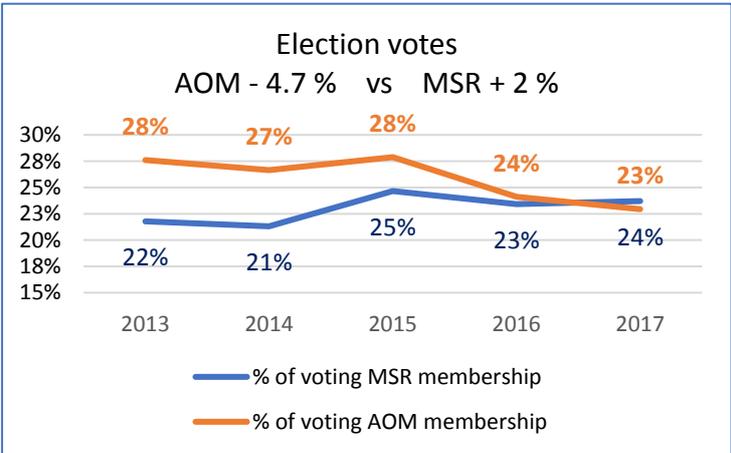
MSR membership participation in the elections has increased by 2 % in the past five years, passing slightly above the AOM average in 2017, another sign of MSR member engagement.

MSR AOM metrics summary

Membership

After a 16 % membership decline between 2012 and 2013, MSR has stabilized its membership over the past 5 years, increasing 2 %. Membership geographic distribution is 59 % US and 41 % outside of the US. While MSR US membership has decreased 11 %, membership outside the US increased 26 %. This international membership growth brings MSR closer to AOM's commitment to increase international membership. Academic membership represents 72 % of MSR and is growing 9 %; flat in the US, it is growing 26 % outside the US. Students represent 17 % of MSR membership with opposing geographic trends, decreasing 40 % in the US and increasing 67 % outside the US. These data may reflect a greater attention to spiritual, religious and community-oriented themes in countries outside the U.S. Executive membership has declined from 10 % to 8 % of total membership while Emeritus membership has increased from 2 % to 3 %. With hundreds of shared memberships, MSR members mainly affiliate with divisions focused on Organizational research (OB, ODC, OMT), SIM, ME, Strategy and Diversity.

AOM conference registration, submissions and reviewers

MSR conference registration is constant over the 5-year period with variance based on venue location and perhaps on theme. It remains between 5 % to 10 % below the AOM average. AOM and MSR registration trends are similar for members outside the US. Though MSR submissions as a percentage of total membership remain low at 12 %, they have increased by 13 % over the term, peaking at 40% in 2016. The number of reviewers has increased by 62 % over the period, to 25 % of total membership; in 2017 33 % of members outside the US were reviewers.

MSR program acceptance rates

Acceptance rates generally follow the AOM averaged trend, with year to year variance that can be reduced by seeking higher consistency from one chair-person to another and with a better understanding of the Academy's policies and space/time allocation criteria.

MSR Elections

MSR membership participation in the elections has increased by 2 percentage points, just passing above the AOM average in 2017. Just like the growth of reviewers and submissions, this change illustrates the increasing engagement of MSR membership.

The following section will cover the results of the 2017 membership survey.

MSR 2017 membership survey

On a basis of 579 members as of mid-October, the 2017 MSR membership survey received 194 complete responses, representing a 33.5 % response rate. Partially completed surveys brought that total to 212 responses for a 36 % response rate.

MSR member survey demographics
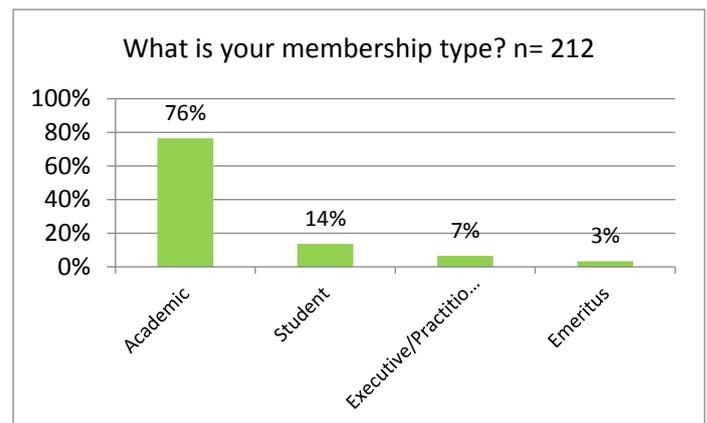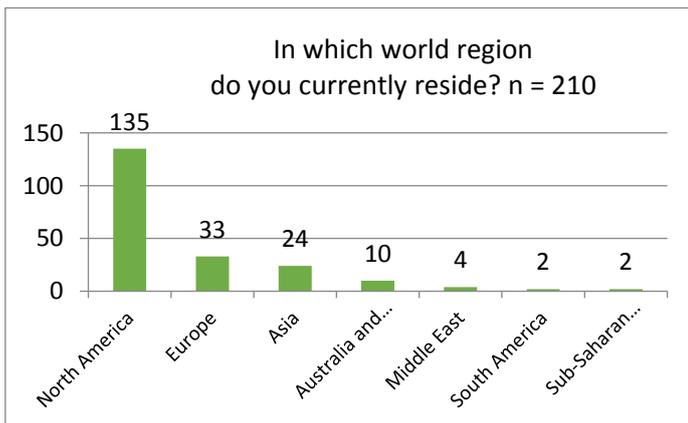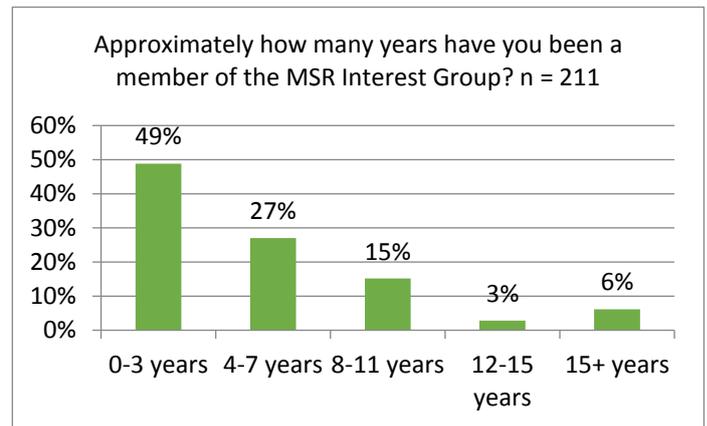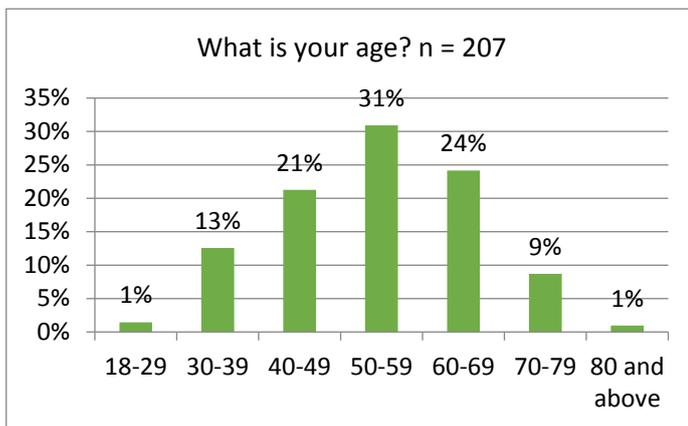
Sixty-five percent of the 2017 survey respondents are age 50 and above, possibly due to an increasing interest in MSR-related questions as we grow older. Forty five percent of the survey respondents are female. Respondents tend to have a recent affiliation with MSR as 76 % have been a member of MSR for 7 years or less, down from 83 % in 2012, indicating a renewal of our membership yet a gradual member retention (progressing from 17.4% to 24 % above 7 years of membership in the past 5 years). Our goal is to find ways to continue retaining members by providing an engaging and worthwhile MSR community of practice and services. While 59 % of MSR's membership is US-based, 65 % of the survey participants is based in North America. Academics and Students compose 90 % of the respondents, stable for the past 5 years.

For forty percent of the respondents, MSR is their unique primary DIG, for thirty-five percent MSR is one of their two primary DIGs. For twenty-six percent MSR is their secondary DIG.

Reasons for belonging to MSR

**Please rank order why you belong to MSR,
(6 = most important reason to 1 least important reason) n= 209**

Reason	Value
Gain and share information relevant to research	5,0
Gain and share information relevant to teaching	3,8
Gain and share information relevant to training and management practice	3,7
Develop and maintain professional connections	3,5
To learn more about a domain that is new to me	2,7
Develop and maintain social connections	2,6

Information on research, teaching and practice are the main reasons for belonging to MSR. An optional category was added, *Developing professional connections*, that comes in 4th ranking order. These all signify MSR needs to develop even further its ability to globally disseminate research, teaching and practice information and knowledge online, set up communities of practice and local chapters to coordinate information sharing among members.

Overall, how satisfied are you with your membership in the MSR? n = 203

	Percent
Extremely satisfied	16%
Very satisfied	27%
Satisfied	46%
Somewhat satisfied	10%
Not satisfied	1%

Would you recommend to a colleague that he/she join MSR? n = 198

	Percent
Yes	73%
Possibly	25%
No	2%
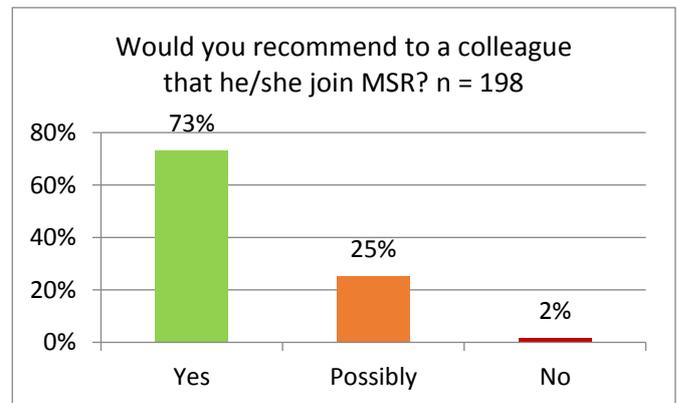
Eighty-nine percent of the 2017 respondents are satisfied with their MSR membership, 43 % are very or extremely satisfied. Ten percent are not quite satisfied. About ¾ of respondents would recommend someone else to join the interest group and ¼ would *perhaps* do so. Inquiring on the reasons of lower satisfaction for 11 % and lower enthusiasm to recommend the DIG to a colleague for 27 % is necessary and will provide us insights for improvement. More detailed satisfaction results for MSR activities and services are analyzed lower.

MSR membership registration at AOM

While 40 % of the survey respondents consistently attend AOM and another 40 % come either when presenting or sporadically, one fifth practically don't attend at all.

How frequently, on average, do you attend the Academy's Annual Meeting? n=207

Category	Percentage
Pretty much every year	41,06%
Only when I am on the program	23,19%
Once in a while	14,98%
Rarely	6,76%
Never	14,01%

If you do not attend the AOM Annual Meeting, why not? n= 140

Category	Percentage
I do not have access to funding	66%
I do not have time to attend	37%
I belong to the Academy for benefits other than the Annual Meeting	18%
I'm not interested in attending	5%

Two thirds of MSR survey respondents who do not attend the annual meeting state not doing so for lack of funding. This is a particular challenge for an emerging field of research, given MSR's lack of mainstream establishment resulting in lower access to institutional funding, faculty positions and research opportunities that are easier for a student or developing faculty member in established fields (e.g. Organizational Behavior, Organizational Development and Change, HR, Strategic Management, …). A growing part of our membership is located in countries with lower purchasing power and may find it difficult to travel to North America. Recently colleagues have been having increasing difficulty attaining US entry visas and thus may avoid even trying.

These issues pose two challenges to MSR, 1) to increase regional AOM conferences in Europe, Asia or the Middle-East and 2) to identify and secure sources of funding enabling more members to attend by creating awards or "AOM conference grants".

MSR membership participation at AOM

Participated once or more n = 208

Activity	Count
Attended a regular conference session	152
Participated in other activities (social,…	135
Attended a PDW	120
Served as a reviewer	116
Presented at a scholarly session	113
Presented at a PDW	78
Served as a chair or discussant	59
Volunteered in some capacity	47
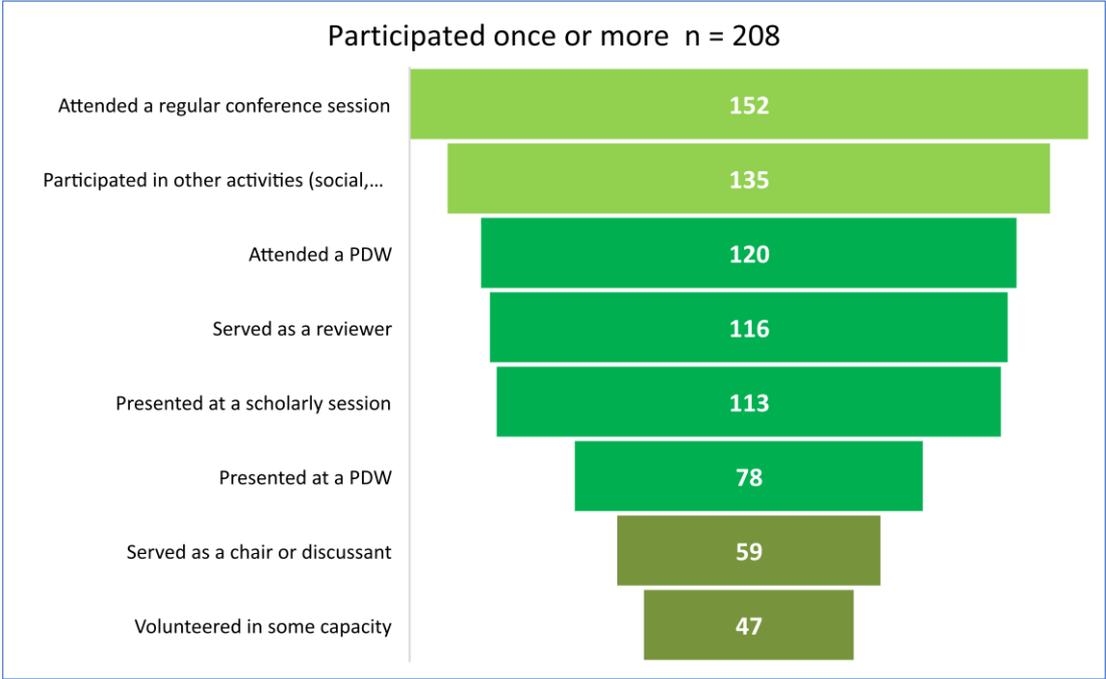
This graph presents the types of participation in the annual program ranging from more participations to fewer. Somewhat predictably, more members participate as attendees, followed by reviewer activities and scholarly and PDW presentations. Session chair or Discussant and Program volunteers are the least preferred activities. With regard to developing scholarship and research in MSR, it is to be noted that 54 % of the 208 respondents had presented at least once at a scholarly session, 56 % had served as reviewers while 38 % had presented at a PDW.

It is our intention to increase the number of members volunteering and serving as session chairs, which is to be expected given the constant increase and development of reviewers from one year to another.

Membership satisfaction of MSR AOM program features

The average satisfaction scores for MSR activities are closely grouped, mostly expressing members being satisfied to very satisfied (3.00 < average score < 4.00).

Level of satisfaction with features of MSR's annual meeting program
(1= not; 2= somewhat; 3= satisfied; 4= very; 5 extremely) n= 202

Feature	Score
PDWs	3,71
Access to participation on the program	3,68
Social and networking opportunities	3,62
Symposia	3,59
Plenaries	3,56
Discussion paper sessions	3,48
Traditional paper sessions	3,37
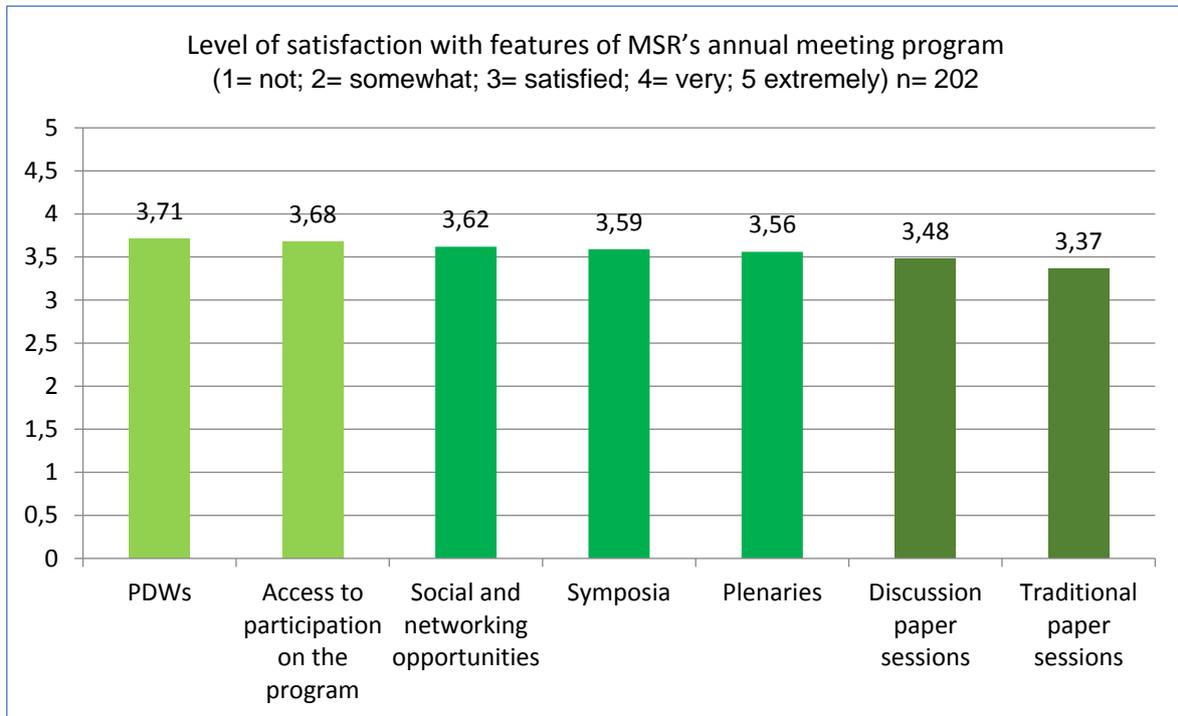
To gain granularity beyond the averages appearing above, the graph below shows the score ranking of MSR conference features based only on Very and Extremely satisfied responses.

Number of members Very and Extremely satisfied
with MSR's annual meeting program activities   n=202

Feature	Very Satisfied	Extremely Satisfied	Total
Access to participation on the program	52	30	82
Social and networking opportunities	43	30	73
PDWs	37	28	65
Symposia	43	21	64
Plenaries	42	18	60
Discussion paper sessions	37	19	56
Traditional paper sessions	40	16	56
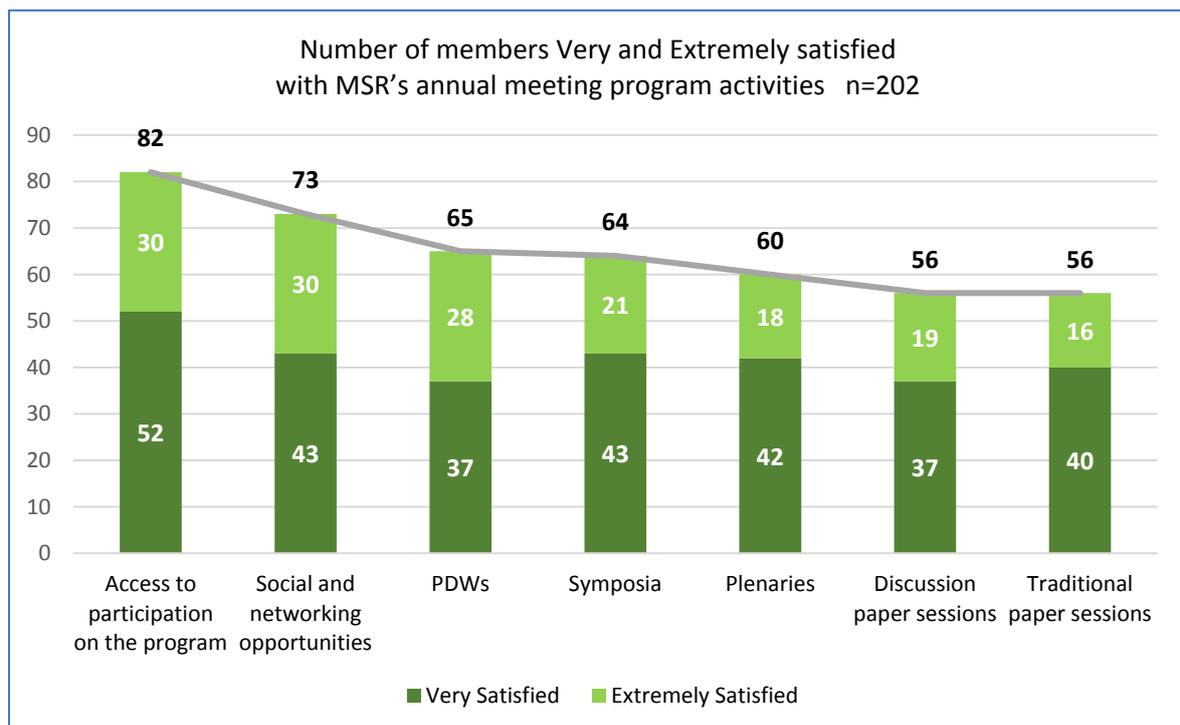
Despite averages ranging between satisfied (3) and very satisfied (4), one can notice the slightly lower satisfaction levels in the MSR discussion and traditional paper sessions. These results may be partially due to the nature of the research, covering a broad spectrum of faith and spiritual traditions and research designs. While well appreciated by members, this diversity leads to a wide variety of approaches, which in paper sessions may not satisfy all attendees.

Another possible reason for this ranking could be that MSR members particularly appreciate experience, expressed here by a preference for PDWs, Symposia, Plenaries and Social events. These sessions allow members to communicate research orientations with like-minded colleagues while sharing an experience; this is an essential feature that MSR provides for people in our forming field. Throughout the annual conferences, attendees spontaneously stop Executive team members to express their appreciation for the human warmth and welcoming they find in MSR sessions, often making a point that it is a unique value of MSR within AOM.

The result in the first graph is confirmed by the second chart that focuses only on responses of Extremely and Very satisfied members with MSR program features, representing between 40 % (Access to program) and 27 % (Traditional paper sessions) of this question's respondents.

Much has been done to infuse quality, energy and stimulation to improve the quality of the program. Communicating to our membership, creating the full day Research Consortium, inviting renowned scholar guest speakers to the MSR Consortium and Plenary sessions, creating cross divisional and transdisciplinary events ("MSR and friends"), increasing the scholarship focus of the MSR Retreat have all contributed to these results.

The future focus is to increase quality and quantity of traditional and discussion paper sessions and increase volunteer activities. Developing the theoretical and methodological foundations of MSR's field and pursuing transdisciplinary collaborations with other AOM divisions will participate in increasing the quality of the MSR annual Academy program. Continuing to develop reviewer quality through webinars and videocasts and offering coaching for rejected papers as in the past 3 years will lead to providing quality feedback to submitters to better their submissions. With a growing number of MSR related articles in AOM journals (see brief list over past 5 years in annex 5), reaching out to those scholars to discuss their research and publishing process in MSR forums at AOM and on Webinars is another way to improve program quality.

The following pages cover membership satisfaction and interest in MSR activities and services.

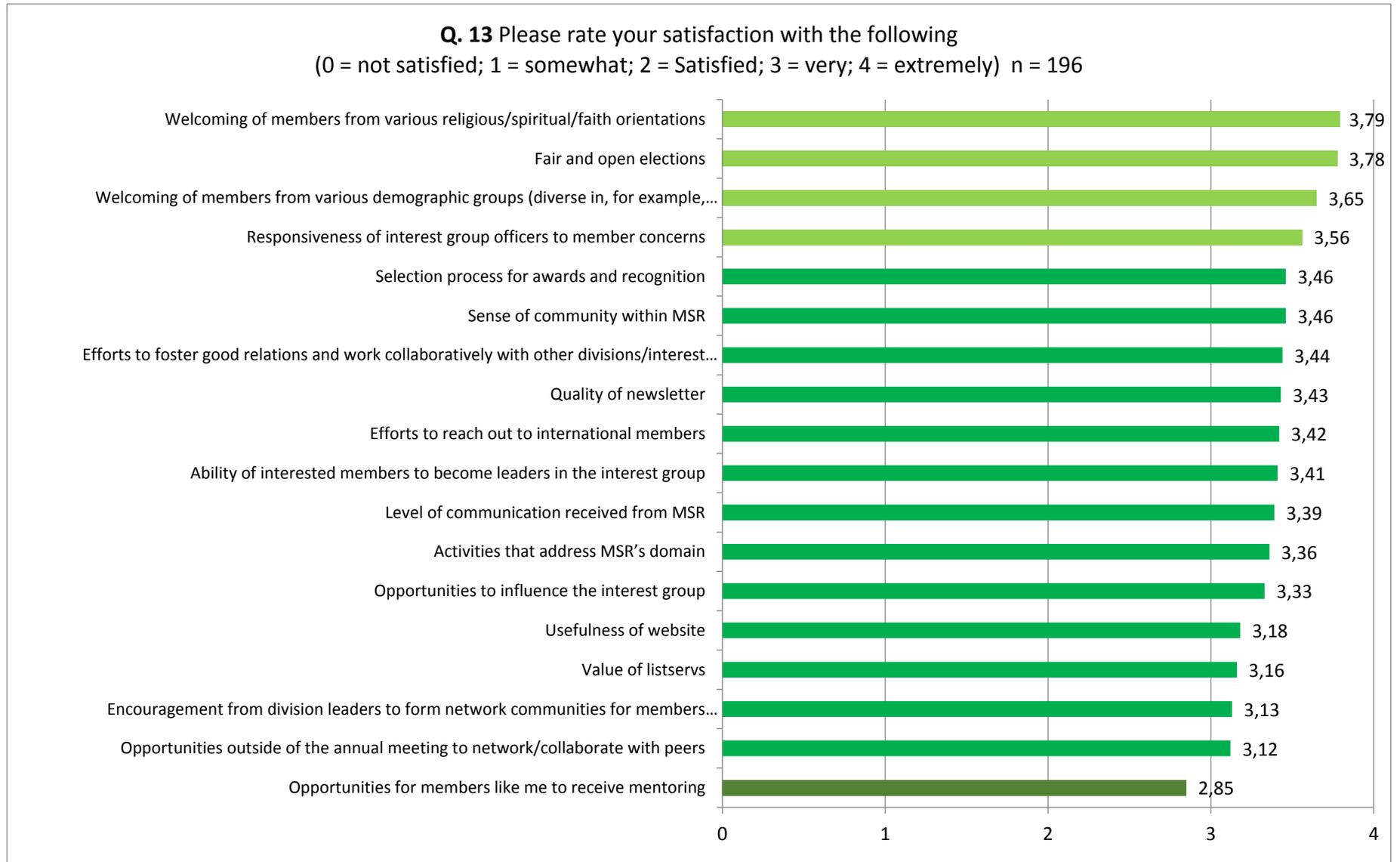**Summary of demographics, reasons for MSR membership, program satisfaction**

Thirty six percent of MSR's total membership participated in the 2017 survey, 33,5 % completed the entire survey. This indicates a high level of engagement of our members to express their opinions and their interest in MSR's future.

Sixty-five percent of respondents are above 50 years old, which may relate to an increased interest in human spirituality, religion, community and wisdom as one grows older. Sixty five percent of survey respondents are based in the US; 76 % are academics and 14 % are students. Twenty-four percent of our members have been with MSR for 8 years or more, increasing from 17.4 % since 2013. We have seen a slight increase in female respondents from 42% to curently 45 %. Forty percent of the respondents state that MSR is their primary DIG in AOM, 35 % more share their main affiliation with another DIG and for 20 % MSR is their secondary DIG.

The main reasons for belonging to MSR are to gain and share information about research, teaching, practice and training, and to develop professional connections. Close to 90 % of the 2017 survey respondents are satisfied to extremely satisfied with their membership, while around 10 percent are somewhat satisfied. Seventy-three percent of the respondents would recommend a colleague to join MSR, and another 25 % might do so, meaning there is clearly room for improvement to serve all our constituencies. In terms of registration, 41 % of the respondents come to the annual AOM conference very regularly, another 23 % when presenting, 15 % sporadically, while 20 % practically don't come at all. Two thirds of those not attending state it is due to lack of funding. Participation is highest in regular conference sessions and social activities while a strong percentage of respondents have served as reviewers and presented papers in scholarly sessions and presented in PDWs.

The average satisfaction level regarding MSR program activities ranges between satisfied and very satisfied. PDWs come in first rank and Discussion and Traditional papers sessions appear last. The highest levels of satisfaction are in the Access to the program and Social networking, which is meaningful for MSR researchers who often express a sense of isolation in their academic institutions and need a community with whom to relate and share research interests and projects. PDWs, Symposia and Plenaries are the next highest ranked, providing a more experiential way of learning and sharing research with colleagues than paper sessions. This aspect of MSR sessions is much appreciated by our membership who can experience at the annual AOM the values and orientations that are exemplary of this field of research.

Membership <u>Satisfaction</u> with MSR governance and activities – how are we doing?

Q. 13 Please rate your satisfaction with the following
(0 = not satisfied; 1 = somewhat; 2 = Satisfied; 3 = very; 4 = extremely) n = 196

Item	Value
Welcoming of members from various religious/spiritual/faith orientations	3,79
Fair and open elections	3,78
Welcoming of members from various demographic groups (diverse in, for example,…	3,65
Responsiveness of interest group officers to member concerns	3,56
Selection process for awards and recognition	3,46
Sense of community within MSR	3,46
Efforts to foster good relations and work collaboratively with other divisions/interest…	3,44
Quality of newsletter	3,43
Efforts to reach out to international members	3,42
Ability of interested members to become leaders in the interest group	3,41
Level of communication received from MSR	3,39
Activities that address MSR's domain	3,36
Opportunities to influence the interest group	3,33
Usefulness of website	3,18
Value of listservs	3,16
Encouragement from division leaders to form network communities for members…	3,13
Opportunities outside of the annual meeting to network/collaborate with peers	3,12
Opportunities for members like me to receive mentoring	2,85

MSR's purpose is to "*To build a transdisciplinary global network of academics and practitioners by creating shared research and learning opportunities that explore the field of Management, Spirituality and Religion*". The Interest Group contributes to achieving its mission through its AOM program, outreach activities, governance processes and generally by creating a community of practice to support members' research, teaching and practice.

We observe here that 34 % of the total membership stated their satisfaction with MSR provided services giving average scores ranging between very satisfied (3) and extremely satisfied (4).

Respondents are most satisfied with:
1) a community supporting scholars of different traditions, beliefs and origins,
2) fair and well understood governance (elections, awards, exec team responsiveness),
3) general communication and outreach to international members.

Beyond increasing satisfaction on the above, essential improvement points stand out:
1) communication and online media such as the MSR website and Listserv,
2) local network opportunities through regional MSR hubs and events,
3) opportunities to receive mentoring.

These three items are recurrent in the quantitative and qualitative results and will be key focus areas of our strategic orientations and actions concerning membership engagement and development. The topic of mentoring is an interesting example of our limitations in reaching our membership with information of their interest in an effective way. Despite a program initiated in 2016 and communicated during Anaheim and Atlanta AOM as well as through membership email and listserv, some members do not know about it and are requesting more mentoring. We need to find better ways to reach and prompt responsiveness from our membership in an era of information overload. We lack today of measures and indicators as to what extent MSR Executive Committee messages are opened and read.

Membership <u>Interest</u> in MSR services and activities - focus areas for coming years

Q. 17 MSR has developed several initiatives in the past 5 years. MSR is also strengthening/expanding services to its members. Please rate your interest in the following
(0 = Not interested; 1 = Moderately; 2 = Interested; 3 = Very; 4 = Extremely) n= 189

Activity	Rating
Developing Research collaboration opportunities	3,74
Research Consortium	3,54
Increasing research and teaching collaboration with other AOM divisions	3,49
External Relations: Work on broader corporate, societal, and public policy issues	3,34
MSR Practitioner resources	3,31
Global, collaborative MSR projects	3,31
MSR Teaching and Learning resources	3,31
Scholarly Spiritual Retreats	3,15
Developing theme-based MSR project teams and committees	3,11
Supporting the needs of the mid-level and senior faculty	3,1
Enhanced website with collaborative tools	3,09
Online events (Video and Audio Presentations, Gatherings, Workshops and…	3,04
Developing International MSR ambassadors and local chapters	2,99
Mentoring Program for doctoral students and faculty	2,94
Professional development for reviewers	2,91
Career coaching and support for doctoral students and faculty	2,87

MSR members' interests are primarily

    1) Internal and external collaboration and transdisciplinary research and teaching projects,

    2) Dissemination of knowledge and information resources through online tools and events,

    3) Support to mid-level faculty, reviewers and doctoral students.

We designed redundancy into our optional survey questions to dispose of multiple data points. These converge here towards a few focused strategic directions we need to continue acting on. We found a couple of intriguing points: 1) Interest in developing local ambassadors/chapters is ranked low. It may not be the *way* members wish to engage, perhaps preferring virtual networks and communities, even if they expressed interest in local gatherings. 2) Interest in mentoring is also ranked low, which could be due to the higher membership age-range, though younger members may express mentoring is not satisfactory because they are not aware of it. Feedback from the current mentees has been excellent.

Please rate the level at which you agree or disagree with the following statements (1 = Strongly disagree; 2 = Disagree; 3 = Neutral; 4 = Agree; 5 = Strongly agree) n = 194

4,37	3,75	3,74	3,71	3,56
MSR promotes important values that I share.	MSR should develop more events that occur at times other than the annual meeting.	The MSR newsletter is a valuable resource.	THe MSR listserv is a valuable resource.	The MSR website is a valuable resource.

Of the 34 % of total membership that responded to this question, MSR members *somewhat* agree (3.5 < average score < 4.5) that communication vehicles such as the newsletter and online resources are valuable, while wanting more events to take place outside of the annual Academy meeting. The highest level of agreement is that MSR promotes values its members share. This is one of MSR's strengths, aligned with universal spiritual and religious values of human respect, benevolence and compassion It contributes to the diversity MSR incarnates, welcoming individuals into a research community to work on common interests, whatever their beliefs, religion and origin.

We will now complete our survey review with the qualitative analysis of 652 member verbatim.

Qualitative analysis of 2017 membership survey 652 verbatim statements

Our Most Promising dissertation 2017award winners, cited on the front page, conducted the theme analysis for this review, identifying member needs, desires and main areas of interest.

Eddie Chavez, Western Reserve University, analyzed the following questions:
Please specify the types of MSR services and resources that would be most meaningful to you.
What issues should occupy MSR's time over the next 5 years?

1. **Connection, Community, Outreach (152)**

   - **Enhancing Research collaboration, communication and networking (51)**
     - *Through Collaboration, Networking, International Outreach, Contacts*

   - **Desire for connection (44)** - Connection was suggested in 4 different ways, through:
     - *collaborations* across research, teaching, and practice,
     - *impact* of work, both in the public and private spheres, influencing social justice and politics and raising the rigor of their research.
     - *in-person meetings*, getting together in geographical hubs,
     - *networking*, where MSR could develop the international community.

   - **Enriching Community (41)** - Communication, Community, Membership growth
   - **Interconnecting Communities (16)** - Partnership with AOM divisions, outside entities

2. **Professional development: Research, Collaboration, Networking and Support (90)**

   - **Professional Development (36)** – Increased Coaching, Mentoring, Research and Practitioner skills. Respondents described aspirations for advancing their research, methodologies, practitioner skills, teaching, publishing potential and reviewing skills.

   - **Support (23)** - Information and knowledge sharing, digitization, a better use of the MSR website where videos, information and tools might be shared for ease of access and connection to others around the world, where collective wisdom and findings could be shared to propel the group forward, reducing the amount of time to search for answers.

   - **Member support and diversity** (18)
   - **Enhancing research excellence** (13) - Rigor, Dialogue, Funding opportunities

3. Developing MSR (29)

MSR members believe that the MSR group will benefit more from becoming a full division at AOM, diversifying MSR activities in creating a forum for teachers, organizing regional workshops for doctoral students, developing online platforms to engage more members and improving research quality to earn recognition.

- Developing MSR (21) - Division, Activities, Online platforms, Quality of Research
- Enhancing influence by attracting and engaging members (8)

Chi Mai Vu, Durham University business school, theme analysis summary (n= 185):
If there was one thing you would most like to improve regarding MSR, what would it be?
What can the MSR interest group do tomorrow morning that would increase its effectiveness?

MSR members in general would like to see more improvements in **research collaboration and networking** not just within MSR group and AOM but with other institutions and communities; in **enhancing research excellence** by having more opportunities to discuss, dialogue and share research ideas and interest, and to **have more rigorous and high quality empirical studies with more qualified reviewers**; in providing **more effective support for new members** with better internal communication; and in **increasing both regional and international outreach and connections** within and outside MSR group.

On the other hand, in terms of AOM meeting, a few members suggested to have **"more sessions in the "regular" AOM meeting"**. Many faculty attending AOM are on limited budgets and cannot afford to stay for both the PDWs and the regular meeting. **Participation in the regular meeting is more externally valued** (peer-reviewed paper presentations) and thus an attendee on a limited budget is likely to spend their money on attending that.

In terms of what the MSR group stands for, members also would like to see a *"continued balance between spirituality and religion-related emphasis, as well as ongoing integration"*.

MSR members believe that MSR group can further develop **by becoming a full division at AOM**, together with **diversifying MSR activities**, **developing online platforms** and **improving research quality**. Collaborations and communications are also important factors to maintain and strengthen MSR by **having open dialogue and discussions**, **initiating joint collaborations**, **enhancing more effective communications with current and new members**, and further **reaching out to academics and**

practitioners outside MSR. **Communication is particularly important for new members as some are still unclear of MSR's activities or benefits**.

Therefore, **MSR group should better engage its current members with regular updates**, **create platforms to connect and share and attract new members from other divisions** by incorporating MSR related topics in other divisions and **provide strong membership support**.

These results confirm yet again the essential areas to focus on in the coming years. They suggest a strong desire to connect with other MSR researchers around the world and create a strong community of practice. This is to be expected in what remains a developing field, with growing though weak recognition in many academic institutions. Along with this need for connection and sharing comes the desire for professional development and collaboration, strengthening the research in this field. Our members seem eager to develop within the MSR field and are expecting MSR to provide them the means to do so. The third area of progress for MSR is developing the organization, its activities, membership, and its status within AOM, for MSR to have a fully-fledged legitimate status within the AOM research community.

Thushini Jayawardena, Auckland University of Technology, analyzed the responses to two questions:
What are the highlights of your experience with MSR?
What do you like most about MSR? **(n=169)**

1. **MSR Group (115)**
   - People: Open & welcoming, Sense of community, Warm, caring & positive spirit.
   - MSR: Communication, Leadership, Membership, JMSR Journal, Mentoring.
   - Research & Scholarship: Scholarly debate and collaboration, Reviewing and editing.

2. **MSR events (54)**
   - PDWs, MSR consortium, Plenary sessions, MSR retreats, Awards and recognition
   - Networking, Friendship, Social events

The following two pages illustrate the themes analyses above with some member verbatim statements.

Verbatim statements of members' needs, MSR contributions and improvements

Research

I like MSR a lot. But, I think we as a community are still in our infancy. We need to do much more high-quality research in order to create more legitimacy for MSR. So, emphasis on high quality research and valid research methods should be number a high priority.

Identifying research interests for pursuing joint research is my highest priority.

I am still not clear on valid and effect research methods for conducting MSR research. That includes measurement issues which seem to me problematic.

The Scholarly-Spiritual Retreats that are amazing- and highly diverse - more than would be expected in AOM. Continue to offer more retreats, including research and writing retreats for MSR members in different parts of the world.

Information - Communication – Knowledge

I don't have much information about relevant journals. If I had some, I believe I could grow a better sense of MSR's topics, challenges, contributions, and controversies.

Online events (Video and Audio Presentations, Gatherings, Workshops and Conversations, Podcasts, Live and on-demand forums) to foster sense of connection, MSR learning and practitioner resources.

Recording and posting several sessions at the conference - that help MSR Community that can't get to the AOM annual meeting to stay connected.

I would like to have a place where I can explore all kinds of information about this group so that I can figure out how I can contribute to and benefit from this group. Knowledge is the most meaningful thing to me.

Increase outreach. Make websites and listservs more visible and dynamic and relevant.

Collaboration and networks

Global collaborative is the most meaningful to me. Let's learn from other experience and move from gadget to events and activities with more impact. Open the AOM journal to help MSR get out of the sect like area.

Organize meeting of diverse forms abroad. for instance, I would be happy to welcome you to India. I am French but more interested in India where I am currently.

Continue to work on developing connections with leaders in the broader corporate, societal, and public policy communities.

Collaborative research, global collaborations, developing external relations networks for opportunities to make change in broader society.

Meetings in geographies, Website resources, methodology and teaching workgroups.

Dialogue and Advocacy

Given the spiritually tragic events occurring all around the world ever too-frequently, I would very much like MSR (and AOM) to continue and to expand its/their advocacy for social justice, inclusion, climate change leadership, etc.

Needs to become a division; the interest group status marginalizes the group.

Develop many opportunities for dialogue throughout the year - using group processes that help members explore systemic changes they would like to see in business schools. And powerful projects they want to be a part of - that take on the biggest challenges that the world faces at this time

Develop many opportunities for members to dialogue about what members believe are the most powerful and meaningful ways they can improve the lives of others. To examine what their mission is and explore MSR's purpose and mission.

Highlights of members' experience with MSR - What they like most about MSR

I think the highlight was finding that there is a group that researches in these important areas that impact human experience at the deepest level…

I see faculty involved in management research that really matters to the meaningfulness of work lives.

Being a part of the Humanistic Management community.

"MSR retreat in Bowen Island", "Last year's Retreat", "The MSR Retreat in Atlanta", "Latest MSR retreat...beautiful times…".

I was grateful she took the time to mentor me, a young PhD student.

To meet and listen the true voice of a few dedicated leaders.

My presentation got a lot of feedback which was more than expected.

Strategic orientations and actions

Considering the 2017 membership survey and 2013 DIGR feedback as well as the actions taken over the past 5 years, MSR's strategic directions and actions for the coming years will focus on simple yet essential priorities: developing the quality of MSR research and teaching, connecting members within and across continents and developing the MSR organization.

1. **Developing quality of Research and Teaching**: establish MSR scholarship on strong theoretical, methodological and empirical foundations while continuing to clarify the field's boundaries, through published research in tier 1 journal publications and proven teaching curricula.

2. **Connection, Network, Community and Outreach:** support and develop MSR members' professional skills, grow a vibrant MSR global network that provides mentoring, training, collaboration opportunities and disseminated scholarship knowledge. Pursue existing and new partnerships with AOM divisions and external associations and institutions.

3. **Develop MSR** into an attractive, thriving DIG organization by implementing the above through online capabilities *and facilitators* enabling to reach and bring together all members the year around. Attain AOM Division status to legitimize the MSR field of study and create a stronger impact.

1. **Research rigor and development**

2022 objectives are that the MSR field of research is:
- clearly defined and understood;
- fully recognized within and beyond AOM, acknowledged as providing models, frameworks, concepts and developed theories as foundations for its field and for further research;
- a source of scholarship demonstrated by distinct MSR articles published in top tier journals.

New initiatives include:
- disseminating the Ways and Means foundational paper through various MSR forums,
- applying and developing the concepts from the Ways and Means paper to future publications,
- engaging new partnerships with scholars and practitioners passionate about the MSR field,
- establishing an on-going MSR research project forum to share research among members.

The table below shows DIRG and member feedback mapped against past /current and future actions. The top three items are to improve research: a) rigor, b) visibility and c) publishing in top tier journals. We will continue to develop 1) the Mentoring program; 2) enhancing the Research Consortium; 3) publishing articles in JMSR and other leading journals, 4) retreat scholarship workshops.

RESEARCH and TEACHING - Mapping of DIRG and member feedback to current and future actions			
2013 DIRG Feedback	**2017 Member Feedback**	**Last 5-years' and Current actions**	**Future Actions**
Intellectual contribution demonstrated by theoretical framework development. **Clear field of study** **Publish in mainstream journals** **Energy and focus spent on MSR retreat?** **Writers workshops** **Editor's panels** **Develop Teaching**	**Research visibility MSR Journal**	- Retreat scholarship workshops initiated in 2015 - Publishing in JMSR, established MSR journal	- Extend MSR retreat scholarship workshops outside US - Publishing workshop webinars - IHMAJ articles reflecting MSR domain

	Research rigor	- Ways and Means JMSR paper
		- Founding narratives JMSR paper
		- MSR conceptual frameworks:
		  - Val Kinjersky's Spirit at Work scale
		  - Jody Fry's Spiritual Leadership model
			- Focus on publication of research applying the concepts in Ways and Means JMSR paper at research Consortium, Retreat and other forums.
			- Further the formal foundations of MSR Ontology, Epistemology and Methodologies.

	Information and knowledge sharing **Reviewing and Editing** **Teaching** **Appreciated: Scholarly debate, collaboration and communication**	**Knowledge Sharing** - Research Consortium, panel videos online - Scholar and publisher panels - Research projects online follow-up sessions - Reviewer tips videos, (ex: Kathy Lund Dean) **Partnerships** - Transformative teaching taskforce - Organizations affiliated with MSR: IAMSR, IHMA, LEAP/UN PRIME, FCBWB * - Executive IAMSR and JMSR liaisons - Joint MSR/IAMSR Executive meetings **Co-sponsoring** IAMSR regional conferences - Lourdes (France, 2013) - Barcelona (Spain, 2015) - Fayetteville (Arkansas, 2017)	**Research Consortium** - Develop registration through communication - Continue inviting scholars who publish in our field - MSR research project forum **Make visible and accessible** - Existing class curricula - Published articles - Sessions & papers at regional conferences - Existing JBE, BEQ, LQ publications - Business practices **Partnerships** - Co-sponsor MSR conferences around the world - Develop formal partnerships with organizations such as SIM, LEAP/UN PRIME, IHMA, co-sponsored events, research, teaching and practice/application projects.
Mentoring	**Mentoring and coaching**	- Mentoring program initiated in 2015 - Coaching on rejected papers since 2016	- Grow and extend Mentoring program: enroll mentors, better publicize program to mentees

* *IAMSR*: International Association of Management, Spirituality and Religion; *IHMA*: International Humanistic Management Association; *LEAP:* Leverage-Expand-Accelerate-Partner; *PRIME:* U.N. Principles for Responsible Management Education; *FCBWB*: Fowler Center for Business as a World Benefit (Case Western); *JBE:* Journal of Business Ethics; *BEQ*: Business Ethics Quarterly; *LQ:* Leadership Quarterly

2. Connection, Network, Community and Outreach

The Connection and virtual community building strategy is based on two pillars: technology/tools and facilitation resources. The tools involve mastering the transition to AOM CONNECT in such a way to very rapidly exploit its possibilities and make the MSR CONNECT space more attractive, up to date and useful than the 2016 revamped MSR web site. To be realistic this requires several committed volunteers on dedicated roles from hands-on web design to content posting to social media facilitation. This communication topic had been tentative until now for lack of resources, though it is absolutely essential to growing the services we need to deliver to our members, for their professional development and to grow the MSR field of research.

Success of this strategy will be measured by MSR members around the world finding relevant information, sharing knowledge and building local connections from MSR CONNECT. Content will be provided by all connected members which will in turn increase MSR's attractivity as a valued go-to resource. A holistic, professional grade communication strategy, which to date has been tentative as well, will enable content to be provided from both the MSR hub and within specific communities of interest/practice. The low-hanging fruit will be AOM session videos (with appropriate approvals and authorizations), tutorial-educational resources for researchers, teachers and reviewers, webinars with scholars, research project forum recurring on-line meetings and other developmental resources aimed at engaging people in communities of practice and projects.

We will make a point to continue hosting renowned guest speakers from different parts of AOM at MSR plenaries; the nature of the MSR field transcending multiple dimensions of organizational study. A Student membership committee and executive role were created in 2017. It has recruited a couple of students to grow our student and young faculty engagement. Its purpose is to identify what value we can provide to early stage researchers and to create a community of people who will continue to grow with MSR. A Global MSR hub committee is in the process of creating geography network hubs facilitated by local leaders. This initiative has an immediate call to identify local facilitator volunteers and an email draft is ready to be sent out. Many contacts are being intentionally developed with other AOM divisions and external organizations. For the last 5 years MSR has had a directed strategy to partner, co-sponsor and co-brand regional conferences that will be exetended to other existing events. The best way to transfer MSR into teaching and practice is through knowledge sharing of existing curricula and developing partnerships engaged with associations and businesses. In this regard partnering with AOM MCD and the Practice theme committee will also create shared value.

3. Develop MSR into a thriving DIG and apply for AOM Division status

Our membership has requested that MSR develop into a division and we believe that the functioning of MSR is the same as most AOM divisions, if not better. The DIGR feedback to the 2013 division status application has been taken seriously and the DIG metrics show the results. Here are some of the topics acted upon and needed further action. The next section covers the Health and Governance checklist.

DEVELOPING MSR into an AOM Division - - Mapping of DIRG and member feedback to current and future actions			
2013 DIRG Feed-back	**2017 Member Feedback**	**Last 5-years' and Current actions**	**Future Actions**
To what extent are committees used?	See annex 1 Committee structure		
Lack of Strategic action plan / metrics		Executive committee alignment and effective strategy planning and actions have visibly improved most MSR metrics over past 5 years	Follow-up on 5-year review strategies, focusing on 3 key areas: 1) Quality of Research and Teaching including membership skills development and publications; 2) Two-way communication strategy and planning, online scalable resources and 3) Develop a network and community of practice.
Voting participation low		Voting rate currently above AOM average through communication and engagement at and in between annual conferences	Create an even higher voting rate by engaging membership throughout the year with meaningful information dissemination, knowledge sharing and skills development
H & G checklist not seriously filled-out	See current H & G checklist		
Membership declining	Membership growth, Enhancing MSR influence	Stabilized membership	MSR as pioneer of AOM Connect. Attract and engage members through online and conference activities and communication, "DIG branding"
Energy and focus spent on MSR retreat?	Retreat appreciated as unique in AOM	Scholarly workshop during retreats producing research projects, accepted submissions and publications.	Extend scholarly workshops while maintaining the *practice what you teach* purpose of the retreats.

MSR Health and Governance Checklist – February 2018

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

Bylaws and Domain	*Yes*	*Yes, but needs improvement*	*No*
1. The division/interest group's bylaws are up to date and periodically reviewed and revised, if necessary.	**Yes**		
The current version of the Interest Group's Bylaws was amended in May 2015 as approved by vote held via internet on the AOM site between 4/15/15 and 5/15/15. MSR continuously reviews how it fits our current activities. MSR is currently working on creating a policy manual and preserving the version dates. For the past 4 years the MSR secretary serves as archivist and has been in charge of archiving all MSR Exec documentation. The current secretary is using the new capabilities provided by CONNECT@AOM.			
2. The division/interest group's domain statement is current, and activities reflect its full scope.	**Yes**		
The MSR domain statement was actualized in 2015 and appears on page 5 of this document. It is reviewed annually by the Executive Committee to ensure our activities are in alignment with it. The major dimensions listed in the domain statement are fully reflected in the activities performed by the Interest Group throughout the year and in the topics covered by pre (research consortium) and post (retreat) annual AOM conference activities. The domain statement is in a prominent place on our website and will be as well in our MSR CONNECT Community to help all prospect, new and existing members.			
3. The division/interest group conforms to all official Academy policies as detailed in the Division and Interest Group Chair's Guidebook.	**Yes**		
We follow the AOM policies and practices; when in question, Kerry Ignatz responds to our questions. One situation worth noting occurred in early 2017. At that time, actions were announced by the new United States administration that impacted many individuals who do not possess a United States passport, indirectly many who do possesses a US passport and even their institutions. The leadership of the Academy responded to those actions creatively, expeditiously, and – a great majority of us appear to believe - appropriately. As AOM was grappling with its response to the U.S. Government's actions, MSR was also considering its own actions on this matter. In doing so the chair coordinated successfully with the AOM leadership and was careful to couch its response in ways consistent with the AOM guidelines.			

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

MSR Executive Committee regularly reviews membership numbers during our monthly 1 ½ hour online meetings. Statistics are reviewed during the MSR Executive Committee meeting and then reported to members at the MSR Business Meeting. We have identified specific membership groups of growing importance that would benefit from greater focus, such as international members and doctoral students, and their needs related to networking, programs and support (see #5). The Membership Committee has been tasked to provide a more frequent and structured report on membership statistics trends. The Executive Committee will use such reports to inform development strategies that are creative, responsive and that anticipate the emerging membership trends.

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

The MSR bylaws require the election of a Treasurer, whose role is to generate the Interest Group's financial reports, and who is responsible for all funds of the Interest Group. The Treasurer reports the financial status on a regular basis and issues a financial report every year presented at the Executive Committee Meeting and at the MSR Business Meeting held at the annual conference. Transitions from one Treasurer to another are ensured between the time of election and the handing over of the position.

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

MSR has a very modest budget and ensures that it makes the most of it. It is used only for the annual conference, including room rental and catering for the full day Research Consortium, recognition plaques and the MSR social. Respect of budget has been consistently ensured over time.

8. If feasible, the division encourages outside sponsorship to extend its resources.		*Yes, but needs improvement*	

Most Promising Dissertation Awards have been granted over the past years through external funding. We have sought and received donations and sponsorships from different companies and individuals though we realize that we cannot always rely on the same people to donate. We have discussed this topic for the past year and are in the process of forming a fundraising committee and developing a strategic plan to this effect. The purpose of the fundraising committee is to approach organizations that are close to the MSR field of study and interests, ask them to participate in our AOM program as well as fund MSR's awards (Most promising dissertation, Best paper…) and help to finance students who want to attend the conference but cannot afford it.

Governance	Yes	Yes, but needs improvement	No

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

The MSR Executive Committee works together throughout the year through monthly Executive committee meetings, strategizing meetings, vision and mission meetings. Zoom is used for these online meetings as we have officers on several continents. In the last 3 year we have often met twice monthly, for the Executive Committee and another was focused on MSR vision and mission, strategic re-engineering of the governing structure and the 5-year review. We have researched out for best practices in other AOM Divisions and have been experimenting with initiatives. MSR is in the process now of establishing our MSR CONNECT@AOM. Beyond the enhanced communication abilities this new tool provides, it will enable better document archiving, tracking and retrieval.

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

For some time, the MSR Executive committee operated somewhat impersonally, without sharing more than operational goals and plans, which for a group and field of research was a paradox. Today, the Executive Committee works to develop high quality relationships and strives to reach a climate of mutual trust and respect among committee members. It is a hard-working group with a serious focus on organizing and creating value for our members that brings a high sense of purpose and shared values. The challenges include nurturing a community that helps its members sustain their flourishing and professional development in an emerging field. The challenge and the gift of being part of MSR comes from everyone on the Executive team working very hard while promoting meaningful research that can make this world a better place. Diversity is a strength and we welcome a wide variety of viewpoints. Every Executive Committee starts and ends with a silent reflection time to gather and center before and after tending to business. One can observe a high quality of listening and humor is welcomed.

11. The respective roles of officers and key volunteers are understood, and some level of orientation/guidance takes place.   **Yes, but needs improvement**

In the past 4 years we have developed written documentation form the key roles on the Executive Committee that outline the main responsibilities and include the institutional knowledge that accompanies the role. . This documentation, along with one-on-one guidance between the person in the former role and the newcomer to the role, ensures sufficient training, guidance and continuity from one year to the next. The next step is to create a document similar to the OB Primer, which will be given to all Executive Committee members.

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

Currently we have members of our Executive Committee located in Denmark, France, Canada, Germany, Israel, New Zealand and USA. We need to increase MSR's governance capacity and are continuously in the process of expanding opportunities for volunteers. We identify interested and experienced volunteers to assist with more of the established activities that are currently performed by Executive Committee members. We will establish a "volunteer portal" on the MSR CONNECT where members can indicate their interest in volunteer opportunities. Part of the responsibility of a new "Involvement Coordinator" role will be to systematically track and develop new ways to improve how we recognize our volunteers (e.g., with signed certificates, more individual recognition in communications to membership, etc.). In short, by developing more volunteer opportunities, building a "volunteer leadership pipeline," establishing a formal role to manage volunteers, and providing enhanced recognition to our volunteers, we seek to strengthen the volunteer culture in the Interest Group and respond to members' desires for more leadership involvement.

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

Following the MSR five-year review in 2013, the executive committee established the habit of meeting at least once a month, for an hour and a half. It used a collaboratively constructed detailed agenda communicated in advance. Edited copies of the meeting minutes were distributed rapidly after the meeting, frequently the next day. Attendance in these meetings has been very high, and recently a few guests have also been invited.

In 2015 – 2017 a second, optional, monthly meeting was held to explore the vision and purpose we each held for MSR. These meetings led to the creation of the "Ways and Means" document that yielded a PDW session and a published paper. These meetings were proposed because the monthly meeting agenda was extensive, and we wanted to explore topics in greater depth. Because of the alignment among Executive Committee members they have enabled, it appears these voluntary meetings will become a MSR management process. In 2017 these meetings continued to focus on the MSR vision and shifted to the upcoming five-year review. The voluntary meetings continued after AOM Atlanta, the first one being devoted to exploring shared interests and possible collaborations with a non-executive committee member, David Korten.

In 2016-2017 a new position was added to the executive committee: Flamekeeper of the soul of MSR. This position is currently held by Judi Neal, charged with facilitating a committee of "elders"- statespersons, ensuring the original intent of MSR as inspired by Andre Delbecq, Judy Neal, Lee Robbins and Jerry Biberman is maintained. Another position was created to support our partnership with JMSR, the JMSR/MSR liaison role. The executive committee was also expanded to include other executive committee positions such as the leader of an MSR AOM-wide initiated Task Force on Transformative Teaching and Learning. After Atlanta, a Student membership staff position and committee were created to increase our ability to attract and serve the needs of Ph.D. students starting their academic career in the field of MSR.

We want to coordinate our MSR work among the executive committee members and volunteers to carry out a wide range of responsibilities, while at the same time, maintaining flexibility to adapt to a growing and constantly changing Interest Group with different activities to meet our changing needs and in doing so regularly consider what should be institutionalized and how. We need to constantly adjust our governance to provide more capacity for executive committee members to lead new initiatives and projects. In the past we have had a weak committee structure while new structures are constantly needed. We have developed a new committee structure (in annex) and will be completing it this year. We are learning best practices from the Organizational Behavior and Entrepreneurship Divisions related to committee structures and membership engagement.

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

MSR follows the AOM guidelines and its process is fair, transparent and open.

There has been an increase in the number of people who were and wanted to be on the ballot. Reasons for the increase were various although directly related to requests from MSR leadership and founding members to individuals recommended as potential candidates. Others were identified in different AOM events and contacted by Exec Committee members and some were the result of more outreach through membership efforts.   Each year we had at least three and at times more candidates because we sought recommendations and actively worked to ensure we had three qualified individuals for each position. This occurred because of guidance from prior Exec Committee members, specifically, Kathryn Schuyler. We contact each person recommended and made sure they were willing and able to serve. If the candidate is strong for the position but had limited commitment, we worked to have a backup person for that position. Despite increasingly qualified and committed candidates, in the same manner as for other outreach communications discussed earlier in the report, we could do more to encourage the widest possible variety of candidates to come forward including international and underrepresented.

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

In the last five years MSR adopted new programs and discontinued others. There are several examples of this innovation in programming such as changes to interactive PDWs and scholarly program. We have modified the grouping of paper sessions, created inter-divisional interactive plenaries "MSR and Friends", the full day annual Research Consortium, the Research Incubator at the MSR retreats… In the past three years MSR focused on the continuous professional development of its reviewers. Kathy Lund Dean, past chair of MSR, developed a video sharing her best reviewing ideas, ethical issues, and offered a framework for reading and writing the reviews that communicate a desire to develop the submitter. Other videos and reviewer materials that support MSR reviewers' skills development were found on the AOM website and shared.

In 2015 launched the new MSR Mentor Program and held the first pre-conference Research Consortium in Vancouver. Each year it is developing and modifying its agenda to meet the interest and needs of the participants. In Atlanta the theme was *"At the interface of Business Ethics and Spirituality"* and hosted a panel including Brad

Agle. Doctoral students attend and present their award winning MSR Most Promising Dissertation Proposals. In 2017 the consortium participants generated themes of interest and colleagues who wanted to work together planned follow-up meetings during the next school year.

Programs/Activities (continued)	Yes	Yes, but needs improvement	No
16. Scholarships, travel stipends, or other funding programs are transparent and open to all who are eligible.		**Yes, but needs improvement**	

We provide very little by way of scholarships, travel stipends or other funded programs due to a limited budget and an endemic challenge to acquire external funding. The scholarships we do give are for the MSR Most Promising Dissertation Proposals. Information is sent out to all membership through a transparent process managed by the MSR Awards Committee. We will seek to increase the number of Best paper, Best MSR methodology, Best PDW awards based on what we deem will be needed to develop the field of research, by developing funding programs.

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

We have a number of awards and MSR is choosing the awardees with processes that work well. This can be improved as we codify the criteria for several awards. As stated above, we are considering additional awards. Announcements for awards are distributed via the MSR listserv and website.
In 2014 – 2015, MSR expanded its acknowledgment of excellent scholarly program reviewers by presenting award certificates during the business meeting to excellent reviewers. Those reviewers were also asked if they would like a letter to be sent to one or more individuals at their home institution reporting on their contributions to MSR and AOM through the quality of their reviews. Each succeeding year this process has been improved, with acknowledgement letters being sent earlier and appreciation certificates being sent directly to excellent reviewers even if they did not attend the AOM annual meeting.

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

The PDW and Symposia offer sessions that speak to each of these interests, with leaders targeting each one. Every year there are opportunities for members to engage in teaching and practice related sessions. MSR is initiating a cross-divisional Taskforce on Transformational Teaching and Learning also include people outside of AOM. We will work on developing more for our practitioner members. Among the strategic initiatives in this review we are strengthening our collaboration with sister divisions and partners on cross- sectoral research projects: the International Humanistic Management Association, SIM, Fowler Center for Business as a World Benefit, LEAP, Aim2 Flourish and others. We have a Research Committee, a Teaching Committee and will be creating a Practitioner Scholar Committee in the coming year.
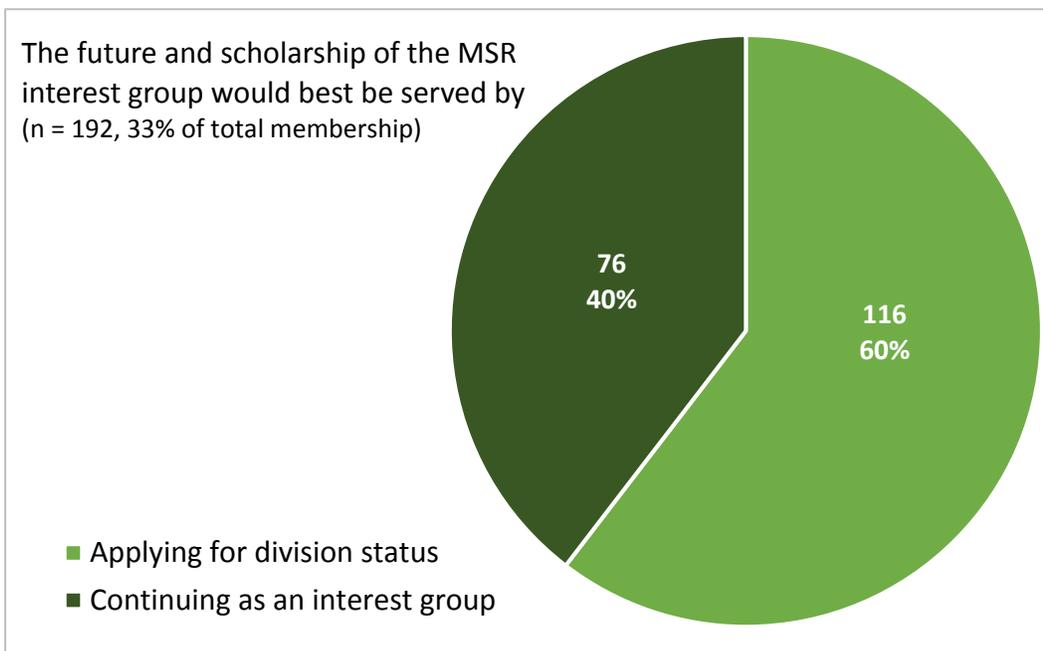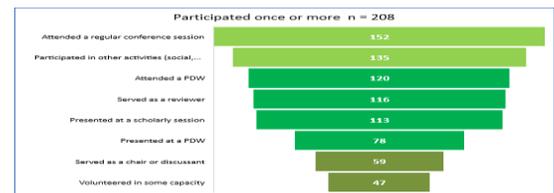
Programs/Activities (continued)	Yes	Yes, but needs improvement	No
19. Services to members extend beyond those provided at the annual meeting.		**Yes, but needs improvement**	

We have held webinars on Zoom related to research and related to teaching. That kind of programming throughout the year is part of our 5-year strategic plan. MSR want to improve our communication with all the MSR membership through our new CONNECT website and its listserv. Currently members communicate accomplishments and announce conferences or other research opportunities in the interest group newsletters, or on the MSR webpage or listserv. We need to engage prepare out members for engaging in discussions on the CONNECT listserv. We will use news blasts to extend our services to our members, focusing on the internationalization of MSR and extending services to international members. We have Facebook and LinkedIn accounts though there is a need for resources to facilitate these social networks. There is a new MSR Twitter account. The immediate challenge will be the transition to CONNECT, so we are working to get everyone successful signed-up and using it this spring.

20. The division/interest group carries out regular communication with members (minimally including a newsletter and up-to-date website).		**Yes, but needs improvement**	

In the past 5 years, an entirely new website has been established with a current look and feel and architecture. A 12 month process engaging Executive committee and membership led to the creation of the well needed MSR logo that has been welcomed with member enthusiasm. Newsletters are compiled and posted on the website 2 to 3 times per year and announced via the listserv as well as membership emails with links to the newsletter. Daily email reminders about the MSR Program during the AOM meetings have been helpful to our members. As MSR works to complete its five-year strategic plan the Communications Committee will enroll among others a CONNECT webmaster; ListServ mediator and assistant and asocial media coordinator. The Communications committee ensures that all MSR events and important deadlines (nominations, award submissions, elections, etc.) are known well in advance. So far a few webinars have been organized and we wish to dramatically increase the outreach with webinars to respond to membership feedback in the 2017 survey.

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

MSR is highly involved in community building as the 2017 membership feedback can attest. Thinking and planning for building community is a constant theme at MSR Executive Committee meetings. MSR has had issues with several elected officers in the community building and membership positions that actually were non-committed and have lost a growing momentum due to this. MSR has hosted socials and plenaries that were very well attended and bring together AOM members across divisions. We regularly encourage members to share ideas or questions on the MSR listserv and at times facilitate this process ourselves. In the future we count on encouraging PDW or scholarly session participants to share information and continue the discussions on Twitter and CONNECT Listserv.

Programs/Activities (continued)	Yes	Yes, but needs improvement	No
22. The division/interest group actively strives to improve the annual meeting program by periodically reviewing program statistics to monitor meeting trends.		**Yes, but needs improvement**	

The statistics are monitored and there is more we could do to use the data for design improvements. We will review this in depth at our annual Executive Committee meeting. We will benefit from looking at the trends in conference paper and symposium interests, submission and acceptance rates. Using the previous year's statistics, the incoming program chair can solicit symposia or other panels that both cater to growing areas of interest and encourage new areas of interest.

| 23. Collaboration exists with other division/interest groups in the Academy. | | **Yes, but needs improvement** | |

At the 2017 annual meeting, the MSR plenary featured 3 speakers who are most aligned with other divisions, while working in areas of interest to the MSR domain. This has been a trend for MSR plenary sessions in the past 5 years, hosting speakers from different disciplines and divisions. Given history and overlapping interests of membership, we have a long-standing relationship with the International Humanistic Management Association, MED, SIM, CMS, ONE, OB and ODC divisions. However, we could broaden this relationship to other divisions such as Research Methods, Entrepreneurship, or Gender and Diversity. Management, Spirituality and Religion issues have increasingly become mainstream, and topics that were typically MSR have been adopted by other divisions.

Conclusion

With this Five-year Review completed, the MSR Executive Committee would like to express its gratitude to the membership that provided the continued support needed to produce this document, from annual membership commitment to survey participation, through service position work and active participation in the difficult steps of PDW, Scholarly paper, and Symposium submission and review. This document reflects the work this global community is involved in, and we hope to continue to produce the positive results and successes, while acting effectively on areas needing further attention.

For this five-year review, we have focused on membership needs and MSR's achievements to date. We wish to have the opportunity soon to portray the foundational work that our members around the world and the executive committee have been establishing to make this field what it is today, with its distinct body of literature, ontological, epistemological and methodological approaches, theories, constructs and models. This will be developed in the forthcoming MSR division status application.

Participated once or more n = 208

Attended a regular conference session	152
Participated in other activities (social,...	135
Attended a PDW	120
Served as a reviewer	116
Presented at a scholarly session	113
Presented at a PDW	78
Served as a chair or discussant	59
Volunteered in some capacity	47

The future and scholarship of the MSR interest group would best be served by (n = 192, 33% of total membership)

76 40%

116 60%

■ Applying for division status
■ Continuing as an interest group

ANNEXES

Annex 1 - MSR finance summary

The MSR finance is quite simple as we mainly rely on the AOM allocation and we occasionally receive some sponsorship. The annual allocation is used in its entirety for the AOM conference. We allocate our funds as follows: 1/3 of the budget for the MSR Research Consortium, 2/3 of the budget for social events AOM AV equipment, Award plaques and MSR branding material. We support the MSR "Most Promising Dissertation Award" with donations. In the financial statement we receive from AOM, the numbers are higher than in reality, as the MSR Retreat is co-counted. However, the MSR Retreat is self-funded; if there is money left (last minute cancellations), it is used as advance deposit for the following year's booking.

Here below we first explain our budget and then describe our funding initiatives.

A. 3-year Budget review

Every year we are allocated a certain sum depending on our membership count on 30th June.

- For the fiscal year 2016 we have been allocated $5, 487.00 for our 641 members:

  + Donation $ 800.00 (Fondation A Dieu Va Offre)

- For the fiscal year 2017 we have been allocated $5, 599.00 for our 657 members

  + Donation $2, 000.00 (James A.F. Stoner Chair for Global Sustainability, Fordham University)

- For the fiscal 2018 we have been allocated with $5, 382.00 for our 626 members

  We do not know yet if we will receive any donation in 2018.

B. Funding initiatives/strategy

The simplest initiative we can engage is to recruit new members and ask colleagues from different divisions to register also to MSR. This entails an extra but minimal cost per year, but more so the difficulty of adding a DIG in-between membership renewals. Second, we can raise funds supporting initially two actions: 1) a travel fund for international and emerging scholars for the AOM conferences and 2) the Most Promising Dissertation and MSR Best Paper Awards. We have created a Fundraising Committee within the MSR Executive under the lead of the treasurer to advance this cause. Its purpose is to solicit MSR-friendly individuals and companies currently in relationship with MSR for funding. The committee is in its initial phase since AOM Atlanta. Our goal is to select the committee members and create a fundraising strategy that we will present to our membership at our MSR Meeting during Chicago AOM.

RESERVE & ALLOCATION							
RESERVE & ALLOCATION	BALANCE FORWARD	$3 894.74	$1 696.67	$2 251.77	$1 686.06	9 727.83	$3 851.41
	DIVISION ALLOCATION	$6 187.00	$5 697.00	$5 354.00	$5 333.00	5 487.00	$5 611.60
	TOTAL OPERATING FUNDS AVAIL Jan 1	**$10 081.74**	**$7 393.67**	**$7 605.77**	**$7 019.06**	**$15 214.83**	**$9 463.01**
REVENUE BY YEAR	SPONSORSHIPS	$4 000.00	$0.00	$1 000.00	$4 449.90	9 572.00	$3 804.38
	ENDOWMENT						
	MISC INCOME	$8 170.00	$1 500.00	$9 525.00	$18 102.83	(1 253.00)	$7 208.97
	TOTAL REVENUE	**$12 170.00**	**$1 500.00**	**$10 525.00**	**$22 552.73**	**8 319.00**	**$11 013.35**
EXPENSE BY YEAR	AUDIOVISUAL	$0.00	$156.00	$0.00	$0.00	390.00	$109.20
	AWARDS	$3 766.50	$3 255.25	$3 474.50	$2 663.00	2 053.60	$3 042.57
	BANK FEES/RET CKS/CHGBACKS	$0.00	$33.54	$13.26	$125.05	39.85	$42.34
	CONTRIBUTIONS EXPENSE	$0.00	$0.00	$100.00	$0.00		$25.00
	ENDOWMENTS						
	ENTERTAINMENT	$0.00	$0.00	$0.00	$410.00		$102.50
	EXPENSE OTHER						
	EXPENSES REIMBURSED	$0.00	$0.00	$141.38	$1 241.86		$345.81
	FOOD & BEVERAGE	$7 045.70	$2 911.04	$12 715.57	$15 404.05	8 667.35	$9 348.74
	GENERAL ADMIN	$500.00	$0.00	$0.00	$0.00		$125.00
	PERSONNEL/PROF FEES/ WAGES						
	POSTAGE & DELIVERY						
	PRINTING PRODUCTION						
	PROFESSIONAL DEVELOPMENT						
	SPACE RENTAL	$5 335.72	$120.00	$0.00	$0.00	542.53	$1 199.65
	SUPPLIES/OFFICE	$0.00	$0.00	$0.00	$0.00		$0.00
	TRANSPORTATION						
	TRAVEL	$3 907.15	$166.07	$0.00	$0.00	8 160.00	$2 446.64
	TOTAL EXPENSE	**$20 555.07**	**$6 641.90**	**$16 444.71**	**$19 843.96**	**$19 853.33**	**$16 667.79**
	FUND NET	**$1 696.67**	**$2 251.77**	**$1 686.06**	**$9 727.83**	**$3 680.50**	**$3 840.58**

Metrics	2012	2013	2014	2015	2016	5-YEAR AVG
Years Overdrawn 0						
Degree to which the division supplements allocation & total operating funds						
% of revenue generated compared to allocated funds	197%	26%	197%	423%	152%	199%
% of revenue generated compared to total operating funds	121%	20%	138%	321%	55%	131%
*Degree to which ***meeting expenses consume resources*						
% of annual meeting exps compared to annual allocation	175%	111%	302%	339%	202%	226%
% of annual meeting exps compared to total operating funds	107%	86%	213%	257%	73%	147%
Surplus and Carryover						
Year-end net as a % of total annual revenue	8%	25%	9%	33%	16%	18%
% of balance forward as compared to total operating funds	39%	23%	30%	24%	64%	36%
Operating expense as compared to dollars available						
expense as a % of allocation	332%	117%	307%	372%	362%	298%
expense as a % of total operating funds	204%	90%	216%	283%	130%	185%
expense as a % of total annual revenue	92%	75%	91%	67%	84%	82%

***meeting expenses are comprised of the three most used expense line items. audiovisual. awards and food & beverage

Annex 2 - MSR committee structure

MSR elected officers are the Past Interest Group Chair, Interest Group Chair, Interest Group Elect, Program Chair, Program Chair Elect, Secretary, Treasurer and Representatives at Large (Communications, Community building and Membership, International, Research, Technology,).

Appointed special advisors (3-year appointment) to date:

Events, Historian/Flame Keeper; IAMSR* liaison; JMSR** liaison; Mentoring; Retreat; Teaching.

Special advisors to be appointed:

- Program Management Office (coordinates resources and manages role descriptions)
- CONNECT Webmaster (web design creations and enhancements)

MSR Committees to date

- Awards (Past chair)
- Communications and Social Media (Rep at large chair)
- Community and Membership (Rep at large chair)
- Elections (Past chair)
- Flame Keeper (Special advisor chair)
- Mentoring (Special advisor chair)
- Research (Rep at large chair)
- Retreat (PDW chair)
- Student membership (Secretary/Archivist chair)
- Website Technology (Rep at large chair)

MSR Committees to be populated

- Fundraising (Treasurer chair)
- International Hub network development (Rep at large chair)
- Teaching and Learning (Special advisor chair)

MSR Committees to be created

- Practice

* IAMSR: International Association of Management, Spirituality and Religion
** JMSR: Journal of Management, Spirituality and Religion

Annex 3 - JMSR and History of IAMSR

Journal of Management, Spirituality and Religion

Our field of research has its own journal: The Journal of Management, Spirituality and Religion. It was established in 2004, and we are delighted that this journal was accepted into ESCI in 2017, an excellent outcome for an emerging journal seeking a future quality impact rating. Further support for its growing reputation is the 93% increase in submissions over the last 5 years (58 in 2013 to 112 in 2017); with a total of 367 submissions. The acceptance rate over the last five years has averaged 26 %. This improving legitimacy of the journal is also evident in ranking and citations: ABS Journal Quality Guide 2015 give it a Ranking 1 in General Management, Ethics and Social Responsibility; Scopus/CiteScore™ Metrics: 2016 SJR: 0.372; CiteScore 2016: 0.64 (Q1 Religion; Q3 Organizational Behavior and Human Resource Management); and Cabell's have a CCI index 33%. The journal has contributions from prestigious scholars including Jay Barney, Otto Scharmer, Ron Purser and David Korten, supporting the reputation of the MSR field of scholarship.

International Association of Management, Spirituality and Religion (IAMSR)

In April 1999, a group including Jerry Biberman, Judi Neal, Mike Whitty and others met at the IABD conference, and the idea for a journal in the MSR field was born. In August 1999, Jerry Biberman, Lee Robbins and Judi Neal hosted an organizing meeting at AOM to discuss the creation of a journal in the MSR field called the Spirit at Work Journal. The reason for taking this initiative is that MSR members were having difficulty getting published in mainstream journals because this field was not seen as a legitimate field of study. This team created proposals and sent them to publishers but were unsuccessful; the MSR group was not large enough to be of interest to publishers and AOM does not allow a DIG to have their own journal, so there was no guarantee of subscribers. At AOM 2002, Jerry Biberman and Judi Neal met with Yochanan Altman who was also thinking of starting a journal in the MSR domain. He was willing to fund it until the group could find a publisher and Jerry and Judi gave him the materials they had put together for journal proposals. The first issue was published in 2004. In 2009, JMSR began to be published by Routledge who required a professional affiliation. Since JMSR couldn't use AOM/MSR as an affiliation, the International Association of Management, Spirituality and Religion (IAMSR) was created. It was designed as a partner with MSR, and home to the journal.

Annex 4 - Regional conferences

We have worked on growing research presence in the MSR field by activities such as increasing MSR's visibility by co-sponsoring IAMSR (see annex 3) regional conferences. These demonstrate MSR's potential to be part of the AOM "global network of management" and to contribute to the AOM Specialized Conferences Initiative. IAMSR holds conferences about every 18 months; at the last two conferences joint board meetings have involved the MSR executive committee and the IAMSR board.

2013
Miracles and Management, Lourdes, France. May 16-19.
> No data available

2015
Spirituality and Creativity in Management, ESADE, Barcelona, Spain. April 23-25.
> 66 scholarly papers presentations
> 30 PDWs
> 7 keynotes
> 7 plenary symposia

2017
Spirituality, Education and Management, Univ. of Ark. Fayetteville, Arkansas, USA. May 18-21.
> 37 scholarly paper presentations
> 28 PDWs
> 3 keynotes
> 3 plenary symposia

Management et Spiritualité (France)

A work group of some 50 researchers, many in HR, came together in 2016 to create Management and Spirituality, based in Paris The group meets every quarter and organizes one day conferences. A member of the current MSR Executive Committee ensures the liaison with MSR.

2016 *Spirtualité et Entreprise*, Brest, January 28

> 15 scholarly paper presentations
> 2 plenary symposia
> 1 keynote

2018 *Quels temps et place de la spiritualité en gestion ?* Paris, March 22

> No data available at this time

Annex 5 – Sample of AOM journal intellectual contributions in the MSR field

Note: These are the more relevant articles that show up in an online search of Academy of Management Journals using these keywords: spirituality, spiritual, religion, religious faith, meditation and mindfulness.

Atkins, P. and S. Parker (2012) Understanding individual compassion in organizations: The role of appraisals and psychological flexibility. *Academy of Management Review*, vol 37, no. 4, pp. 524-546. DOI: 10.5465/amr.2010.0490.

Baden, D., & Higgs, M. (2015). Challenging the perceived wisdom of management theories and practice. *Academy of Management Learning & Education*, 14-4: 539-555.

Bles, R, Barclay, L. and Tripp, T (2016). A systems perspective on forgiveness in organizations. *Academy of Management Annals*, vol. 10-1: 245-318.

Chuang, A., R. Hsu, A. Wang and T. Judge (2015) Does West "fit" with East? In search of a Chines model of person-environment fit. *Academy of Management Journal,* April 1, 2015, 58-2: 480-510.

Egri, C. (2012) Introduction: Enhancing business education through creativity, mindfulness and accreditation. *Academy of Management Learning & Education*, December 2012 11-4: 703; doi:10.5465/amle.2012.0350.

Fehr, R and Gelfand, M. (2012) The forgiving organization: A multilevel model of forgiveness at work. *Academy of Management Review,* October 1, 2012, 37-4: 664-688.

Fraher, A. L., Branicki, L. J., & Grint, K. (2017) Mindfulness in action: Discovering how U.S. Navy SEALs build capacity for mindfulness in high- reliability organizations, *Academy of Management Discoveries,* 29 Dec 2016, 3-3: 239-261.

Gunia, B. L. Wang, L. Huang, J. Wang, and J. Murnighan. (2012) Contemplation and conversation: Subtle influences on moral decision making. *Academy of Management Journal,* February 1, 2012, 55-1: 13-33.

Harris, H. (2013) Toward professional wisdom: Practical deliberations in the people professions. *Academy of Management Learning & Education*, June 2013, 12:2 317-319.

Kudesia, R. (2017) Mindfulness as metacognitive practice. *Academy of Management Review,* October 11, 2017 amr.2015.0333.

Li, X. and X. Liang (2015) A Confucian social model of political appointments among Chinese private-firm entrepreneurs. *Academy of Management Journal,* April 1, 2015, 58-2: 592-617.

McKenna, B. (2013) Teaching for wisdom: Cross cultural perspectives on fostering wisdom. *Academy of Management Learning & Education*, June 2013, 12:2 319-320.

Miller, K. (2018) Responding to fundamentalism: Secularism or humble faith? *Academy of Management Perspectives,* January 19, 2018 amp.2017.0101.

Rooney, D. (2013) Pursuits of wisdom: Six ways of life in ancient philosophy from Socrates to Plotinus. *Academy of Management Learning & Education*, June 2013 12-2: 316-317.

Rynes, S., J. Bartunek, J. Dutton, and J. Margolis (2012) Care and compassion through an organizational lens: Opening up new possibilities. *Academy of Management Review,* October 1, 2012, 37-4: 503-523.

Sophie, J. C van Esch and D. Bilimoria (2018) "Why'd you want to study that?" A process model of the under-legitimization of a research topic. *Academy of Management Learning & Education*, published ahead of print February 2, 2018, doi:10.5465/amle.2016.0015.

Tracey P. (2012) Religion and organization: A critical review of current trends and future directions. *Academy of Management Annals*, 6-1: 87-134.

Tsui, A. (2013) On compassion in scholarship: Why should we care? 2012 AOM Presidential Address. *Academy of Management Review,* January 11, 2013.

Vogus, T. and K. Sutcliffe (2012) Organizational mindfulness and mindful organizations: A reconciliation and path forward. *Academy of Management Learning & Education*, December 1, 2012, 11-4: 722-735.

Waddock, S. and J. Lozano (2013) Developing more holistic management education: Lessons learned from two programs. *Academy of Management Learning & Education*, June 1, 2013, 12-2: 265-284.

Zhu, Y., D. Rooney, N. Phillips (2015) Practice-based wisdom theory for integrating institutional logics: A new model for social entrepreneurship, learning and education. *Academy of Management Learning & Education*, September 1, 2016, 15-3: 607-625.