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Frequently Asked Questions on the AOM's Revised Policy on Taking Stands

The Board of Governors amended the "no stands" policy on February 10, 2017, and subsequently amended it at its regular meeting on April 21, 2017. The new policy is:

"The Academy of Management does not take political stands. Officers and leaders are bound by this policy and may not make publicly stated political views in the name of the AOM or through use of AOM resources. However, under exceptional circumstances, and with the consensual support of the Executive Committee and approval of the Board of Governors, the President is authorized to issue a statement on behalf of the AOM when a public policy action threatens the existence, purpose, or functioning of the AOM as an organization."

Step 1 Short Form: Request for Consideration to Take a Stand on a Public-Policy Action

Please read the [process](#) for making a request for consideration to take a stand on a public policy action.

Related Links

[AOM Statement to the White House \(October 2017\)](#)

[AOM Joint Association Statement \(October 2017\)](#)

[AOM Press Release \(October 2017\)](#)

[AOM Policy on Taking Stands](#)

UPDATED October 16, 2017

On October 10, 2017, the Board of Governors of the Academy of Management (AOM) voted to condemn the September 24, 2017, White House proclamation banning travel and immigration into the United States by citizens of Iran, Libya, Syria, Yemen, Somalia, Chad, and North Korea, and curtailing travel to the United States by citizens of Iraq and Venezuela.

The AOM viewed these restrictions as a threat to science and scholarship and called for the immediate reversal of the policy. In a condemnation sent to President Donald J. Trump, the AOM asserted that the policy threatens scholarly exchange, academic freedom, and the dissemination of scientific findings and thus fundamentally limits fulfillment of AOM's mission. See full [AOM statement](#).

In addition, the AOM joined more than 180 scientific and educational associations and universities in a separate statement to Trump, saying that the latest policy discourages many of the best and brightest international scholars and students from studying, working, and attending academic and scientific conferences in the United States. See [joint statement](#).

In a message to the press, the AOM Board called Trump's September 24 proclamation "antithetical to scientific progress." See [press release](#).

These actions by the Board of Governors are consistent with the recently adopted policy that allows the Academy of Management to take stands under exceptional circumstances that threaten the existence, purpose, or functioning of the AOM as an organization. The Board made its decision after deliberating on a proposal submitted by Anita McGahan, Immediate Past President, and supported by thirteen former AOM presidents.

Mary Ann Glynn

President, Academy of Management

president@aom.org

UPDATED September 25, 2017

An initial member-generated proposal to take a stand on the revised immigration policy ordered by U.S. President Donald J. Trump on September 24, 2017 is currently being reviewed by the Academy of Management Executive Committee. Please visit this website for

further developments.

UPDATED June 26, 2017

U.S. Supreme Court Decision on President Trump's ban on immigration and travel

The AOM is analyzing the developing situation resulting from the U.S. Supreme Court's ruling to allow parts of the U.S. President's immigration and travel ban to go into effect. We are in contact with an immigration attorney and other Associations to assess the impact of the Supreme Court's decision and its implications for AOM. We are also reaching out to AOM members who may be personally affected.

The Board of Governors recently revised the AOM policy on the taking of stands. The Board's decision and the process for making a request for consideration to take a stand on a public policy action are outlined in the questions and answers below. If you have questions about making a request for consideration to take a stand on a public policy action, please contact Executive Director, [Nancy Urbanowicz](#).

UPDATED May 11, 2017

Since the U.S. President's Executive Order of January 27th on immigration and refugees, the AOM has pursued a number of steps to revise the long-standing policy of "no political stands," which had not been accurately named in the first place. These include revising and renaming the policy; commissioning a task-force for advice on operationalization of the policy; [developing a process for accepting requests for consideration from members on taking stands](#); and considering the implications for the location of the Annual Meeting.

Below, we have responded to the questions we've most frequently heard from members.

Q: Why didn't AOM publicly condemn the Executive Order?

The AOM was constrained from condemning the U.S. President's Executive Order by an AOM policy against taking a political stand on any matter. Because the U.S. President's Executive Order was political, the AOM could not condemn it for any reason, i.e., on moral, academic, pragmatic, or other grounds.

Q: Has the Board of Governors revised the no-political-stands policy?

Yes.

The AOM has taken a number of unprecedented steps over the last few months. First, the Board of Governors amended the "no stands" policy in record time on February 10, 2017, and subsequently amended it at its regular meeting on April 21, 2017. The new policy is:

"The Academy of Management does not take political stands. Officers and leaders are bound by this policy and may not make publicly stated political views in the name of the AOM or through use of AOM resources. However, under exceptional circumstances, and with the consensual support of the Executive Committee and approval of the Board of Governors, the President is authorized to issue a statement on behalf of the AOM when a public policy action threatens the existence, purpose, or functioning of the AOM as an organization."

This policy retains the core precept that the AOM does not take political stands. In this regard, we are different from some other Associations that do take stands as a regular facet of their activities.

The revision also implements the possibility of an exception around a change in public policy that threatens the AOM as a whole organization. Such an exception must be approved by the Board of Governors and expressed by the President with the consensual support of the Executive Committee. As a result, a process of vetting and approval is required before a stand can be taken under exceptional circumstances. Please see the FAQ below for more information on this.

The revision to the policy that was implemented on February 10th was accompanied by an embargo on its implementation for 90 days to allow a Task Force to deliberate on how the policy would be implemented. The task force completed its work and reported to the Board of Governors at its regular meeting in Chicago on April 20th-22nd, where the Task Force's recommendations were adopted with amendments. These are also explained in the FAQ below.

Q: What is the origin of the AOM's policy on not taking political stands?

The no-political-stands policy has a long history that emanated from the AOM's legal structure and from our identity as an organization. AOM is a §501(c)3 organization that is chartered in the State of New York and that operates under the laws of New York and of the United States. We are an international body in the sense that we have members from around the world, and it is our aspiration to deepen our international and global identity. Yet formally, AOM is organized for charitable and educational purposes in New York. We

are approximately 18,000 members and a small staff of employed headquarters personnel that are charged primarily with administrative duties. The substantive work of the AOM occurs in 25 Divisions and Interest Groups (DIGS), 10 theme and activity committees, and six journals. The AOM's Board of Governors acts as stewards and leaders in organizational governance. Legally identified as a charitable and educational organization, the AOM is structured differently than other Associations that have other forms of non-profit status such as, for example, §501(c)6 organizations, which are trade associations and business leagues; or §501(c)4s, which are social-welfare and civic associations.

Organizations structured as §501(c)3s have a narrower scope for lobbying than these other forms of organization, and are subject to two relevant restrictions. First, they must not engage in attempts to influence legislation as a "substantial part" of their activities. In general, this limits the extent to which they may communicate with Congress, their members, or the public, in an attempt to influence the approval, amendment, or defeat of legislation. (See <https://www.irs.gov/charities-non-profits/lobbying>.) Second, §501(c)3 organizations may not "intervene" in a political campaign for or against a candidate for elective public office. This means they may not publicly endorse or oppose candidates, make contributions to a political committee, or otherwise use their resources to support or oppose a candidate. (See <https://www.irs.gov/charities-non-profits/charitable-organizations/the-restriction-of-political-campaign-intervention-by-section-501-c-3-tax-exempt-organizations>.) The Academy's articles of incorporation say that we "will not, except to an insubstantial degree, engage in any activities or exercise any powers that are not in furtherance of [the AOM's] primary purposes."

The AOM's identity as a pluralistic, Division and Interest Group-driven organization led the Board to adopt a policy of no political stands at least twenty-five years ago, and possibly much longer. This approach, developed decades ago, was intended as pluralistic. Early Boards of Governors implemented a policy of no political stands because they recognized both the diversity in member views on public policy and the challenge of coalescing those views into a single organizational position. The AOM also adopted a rule that no one, including the President, can represent his or her views as that of the Association. As far as we can discern, the AOM has never in its history issued a position on any matter in the public sphere, including, for example, the Vietnam War, the events of 9/11, or changes in European funding policies related to education.

As a consequence of the no-political-stands policy, the AOM differs from other Associations that employ a professional staff equipped to issue statements on political and public-policy issues. The AOM has no process by which to develop an organizational position. Our headquarters staff is administrative, and our elected officers are uncompensated volunteers with primary responsibilities as academics. The AOM's "thin center" model has been driven by pluralism, low fees, and member identity in the Division and Interest Groups, activity and theme committees, and journals. By contrast, many other Associations, especially those of our size, employ lawyers, policy analysts, and writers to issue statements on important matters of concern to members.

Q: What was the old AOM policy on taking stands, and how was it amended?

The former policy was: "The AOM of Management does not take political stands. Officers and leaders are bound by this policy and may not make publicly stated political views in the name of the AOM or through use of AOM resources." This policy applied to all officers, including those in the Divisions and Interest Groups, Activity Committees, Theme Committees, and Journals. Moral, academic, pragmatic, and other arguments were barred if the subject was also political. Breaches of these policies are ethics violations under the AOM Code of Conduct. AOM Officers and Governors are further bound by the Board Code of Ethics to certain principles of collaboration, process, and adherence to policy and changes in policy.

The new policy seeks to preserve our identity as a member-driven, decentralized organization while, at the same time, allowing a statement in an exceptional situation. Several ideas that reflect our history guided the Executive Committee and the Board in amending the policy. First, we must retain the character of our organization as a scholarly body. Second, in a broad sense, all important political actions engage morality and ethics. Our Ethics Statements -- as well as our statements of values, objectives and goals -- contain and reflect principles that we must adhere to in our policies. The AOM must be able to respond in terms that reflect our principles. Third, the amendment must provide direction on what stand we would take if exceptional circumstances arise. We can take guidance from the fact that, while the AOM's members have differing views on many matters, they collectively endorse the purpose and existence of the AOM as an organization by virtue of their very membership. Fourth, no one, including the AOM President, should unilaterally represent his or her view as the organizational view. The AOM needs a process for developing an organizational stand if exceptional circumstances warrant one. Fifth, the AOM must adhere to legal requirements arising from our §501(c)3 status. Our general counsel has provided us with guidelines that emphasize that any stand taken must be issue-based. Finally, the exception allowed under the amended policy must focus on changes in public policy that threaten the AOM as a whole organization.

Q: Will Divisions, Interest Groups, Committee Chairs, and/or Journal Editors be able to take stands in the name of the AOM?

No.

The amendment passed by the Board of Governors focuses on stands in cases where a change in public policy threatens the whole organization as a single entity. No officer of the AOM – including those in the Divisions, Interest Groups, Committees, and Journals – can take a stand *in the name of the AOM or one of its Divisions, Interest Groups, Committees or Journals*.

Q: What did the Board Task Force on taking stands conclude?

In February, the Board commissioned a Task Force to consider operationalization of the policy. The Task Force members included past AOM president, Professor Michael Hitt (Texas A&M University and Texas Christian University). The Vice Chair was Professor Mary Ann Glynn (Boston College). Other members were Professors Tunji Adebesean (Lagos Business School), Gerald Davis (University of Michigan), Sergio Lazzarini (INSPER Brazil), Raza Mir (William Paterson University), and Katherine Xin (CEIBS). Terese Loncar of the Academy of Management headquarters team joined ex officio.

The task force was asked to consider four items: (a) define further when a political action threatens the existence, purpose, or functioning of the AOM as an organization; (b) identify mechanisms for member input; and outline the decision and vetting process for taking any stand, and for developing such a stand; (c) define the implications of the policy for the DIGS, committees, and journals; and (d) determine how such a stand would be taken. The task force was also requested to deliberate on any other matters that it saw as important for elaborating and implementing the policy. In support of this work, the task force was provided with a number of documents, including member feedback via web survey, and our analysis of how other Associations that do take stands operate.

The task force recommendations fell into two broad areas. First, it recommended revising the language of the policy to indicate that exceptions are allowed when a change in public policy threatens the organization as a whole. This recommendation was designed to eliminate the confusion associated with the prior language of the policy, which referred to "political stands." The "political stands" phrasing suggested that the AOM might, exceptionally, take a partisan view. Because this was not the intention of the Board of Governors when revising the policy, the Task Force recommended changing the language to indicate that an exception would be allowed only when a change in public policy generated the threat to the AOM as a whole.

Second, the Task Force recommended that the Board of Governors adopt a multi-step procedure before taking any stand. This process is designed to assure proper vetting and approval. This process begins when a member completes a short initial request obtained from the [Executive Director](#) of the AOM, that a change in public policy constitutes exceptional circumstances, and that those circumstances threaten the AOM as a whole organization. After the Executive Committee reviews the viability of the request, the member will either be invited to complete Step 2, the full form, that addresses the full consort of concerns that the AOM must consider before taking a stand, or be notified that the request does not meet the threshold for the AOM to take a stand. A request by the Executive Committee to complete Step 2, the full form, does not imply approval of the request to take a stand. These criteria emphasize exceptional threats that affect multiple members and multiple jurisdictions on matters of academic freedom, scholarly convening, scholarly exchange, and scholarship itself. Once the full form, Step 2, is received by the [Executive Director](#), it must be deliberated by the Executive Committee and the President. Requests for consideration that receive consensual support are then presented to the full Board of Governors, which must approve and then authorize the President and Executive Committee to develop an AOM stand. The Board of Governors must then approve the final statement of the stand in a second review.

Finally, the Board of Governors asked the [Executive Director](#) and headquarters staff to make templates for requests for consideration available to members upon the expiration of the embargo on the policy. Please contact [Executive Director Nancy Urbanowicz](#) if you wish to complete an initial request for consideration to Take a Stand on a Public-Policy Action. The embargo expires on midnight on May 10th, 2017.

Q: I am directly affected by the policy and won't be able to travel to the U.S. for the Annual Meeting. How can AOM help?

The AOM fervently values all members, and is committed to enabling the participation on the program of members who are impacted by the recent Executive Order. As a first step, AOM has suspended, for those affected, the requirement of attendance as a condition of inclusion in the program at the Annual Meeting. The AOM is also suspending registration fees for these members. We are mobilizing virtual and other resources so those accepted on the program and impacted by the ban can participate in some form. We are working to contact members in the affected countries and others who hold passports from the named countries to determine how AOM can best help. We are working with all management scholars from the targeted countries who have reached out to us, including non-members. In particular, the AOM is working with an immigration law firm to stay abreast of the situations of affected members. We are also in touch with several universities that are offering 'safe harbor' to affected scholars. If you are directly affected by the ban, please contact Taryn Fiore at tfiore@aom.org. We are also exploring a range of member suggestions, such as increased reliance on web-based technologies and video-conferencing. If you have suggestions for other ways in which we can support and enable scholarly participation by affected scholars, please [reach out to us](#).

Q: At its April meeting, did the Board of Governors consider the location of the Annual Meeting?

Yes.

At the April meeting of the Board of Governors, a discussion of the Annual Meeting location occurred, and a process was developed for considering non-North American locations for future meetings.

The Board discussed a number of factors that influence viable alternatives for the location of the meeting. These include that locations for our conference model and size must be committed seven to ten years in advance of the meeting itself. This is because only a relatively limited number of locations are viable for a conference model of our complexity and a group of our size. The conference industry seeks contractual commitments far in advance as part of complex negotiations between the AOM and various service providers, including hotels, local unions, and transportation organizations. Often these negotiations are organized by city

representatives, who typically offer discounts for large-scale and multi-year commitments. Furthermore, the business models that shape conference arrangements are typically quite different outside North America than in North America. One such difference is that space available in non-North American locations may lead us to have to change our presentation model from paper presentations to poster sessions or travel greater distance between multiple facilities. Despite these complexities, the Board of Governors and headquarters team at the AOM are committed to considering non-North American alternatives for a future meeting.

As a next step, the headquarters team and the Board of Governors has commissioned a report by a consultant on potentially viable cities both inside and outside North America for the 2025 meeting, which is the next available slot for a location of the Annual Meeting that has not yet been contracted. A small number of cities, including locations both inside and outside North America, will be identified as possibilities for the 2025 meeting. Those cities will be invited to make full proposals to the AOM. Once these proposals are received and evaluated, then the President will seek member input about the tradeoffs associated with the most viable of the options. The Board of Governors and the headquarters team will integrate this feedback into its final deliberations on the location of the 2025 meeting at the Board's December 2017 meeting.

Beyond the evaluation of potential sites for the Annual Meeting, specialized AOM conferences will be held outside of North America. The initiative on specialized conferences offers members opportunities to gather at thematic and experiential conferences in locations outside of North America. We invite you to take part in these new conferences and consider submitting a proposal to hold such an event. Please [see our website](#) for information on this initiative. Please also see our calendar of events <http://aom.org/EventCalendar.aspx> and dates for 2018 AOM conferences in Surrey, UK and Tel Aviv, Israel.

Q: Does the program at the Annual Meeting in Atlanta include sessions on scholarly issues at the interface of public policy and management?

Yes.

The 2017 theme, "At the Interface," provides many opportunities for academic scholarship to address issues related to borders, public policy, and management. To advance this scholarly agenda, Program Chair Carol Kulik and PDW Chair Jackie Coyle-Shapiro have developed a dedicated track of the All-Academy program to discuss the connections between public policy and management. The conference program will be available by the end of May on the AOM website. The President, Executive Committee, and Board of Governors looks forward to seeing you in Atlanta.



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AOM President's Message on Executive Order on Immigration & Refugees

Dear Friends and Colleagues in the Academy of Management:

I'm writing to you today as President of the AOM in the wake of the Executive Order signed by President Trump to suspend entry into the United States of citizens from Iran, Iraq, Libya, Somalia, Sudan, Syria, and Yemen.

Thank you to those who have written to me and to other officers about the new restrictions on travel and their implications for AOM. Thanks as well to those of you who have posted on listservs and social media. The scores of messages that I have read reflect the diversity of our 20,000 members, and of the political, social and cultural traditions of the 127 nations where we live and work. Our members hold a range of views on the public policies that have recently been implemented. Many of you have expressed concern about travel to the Annual Meeting in Atlanta; many are interpreting the Executive Order as a direct attack on scholarship; and some are worried about the implication for pluralism on all sides of this issue. A number of you have asked the AOM to condemn the order as antithetical to scholarly values, academic freedom, and democratic processes. Yet because of our very diversity, the AOM has long had a binding policy that restricts any officer from taking a stand on any political issue in the name of the AOM.

I can affirm as President that the AOM stands behind its vision, mission, objectives, and core values. The AOM fervently values all its members. We are committed to inclusion, supportive communities, and social and academic freedom as fundamental and undeniable tenets of scholarly association. Our values emphasize the full diversity of member backgrounds and experiences. The AOM Statement of Values expresses that "We respect each of our members' voices and seek to amplify their ideas." To enact our values, we are taking initiatives on several fronts. First, the AOM is suspending the requirement of attendance as a condition of inclusion in the program at the Annual Meeting for those affected by the travel restrictions. All scholars whose work is accepted to the conference but are not able to enter the United States from travel-restricted countries will have access to sessions in which they are presenting through virtual means. Second, we will also share with you, via our website, the best information that we have about Visa application processes for those who want to attend. We encourage any member from the affected countries who wishes to attend but cannot because of travel restrictions to contact us so that we can work with you toward participation.

Our mission is "To build a vibrant and supportive community of scholars by markedly expanding opportunities to connect and explore ideas." To fulfill this mission, the AOM will soon hold specialized conferences outside the United States on topics proposed by and of interest to members. Please see [our website](#) for information on this initiative. I invite you to submit a proposal if you are interested in leading one. We also will continue working with our affiliates and associates around the world who convene meetings in support of management scholarship and teaching.

The vision of the AOM is to inspire and enable a better world through our scholarship and teaching about management and organizations. I encourage AOM members to double down on the scholarly agenda. Let us be more engaged, creative, and committed to scholarship and teaching on the issues of our day. Let us stand together in Atlanta in solidarity with our diverse membership as the world's premiere association of management scholars and business-school professors. Academic integrity is our strength. Through our scholarly discussions and debate, we can find a way forward together. This is the AOM's purpose and this cannot and will not change.

Thank you again for your involvement in our AOM community, for your ideas, and for your work as educators.

Sincerely,



Anita M McGahan

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[AOM Policy on Taking Stands](#)

[Things You Can Do Individually to Respond to the Executive Order](#)

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Things You Can Do Individually to Respond to the Executive Order

1. Sign a petition:
 - [Academics Against Immigration Executive order](#)
 - [Change.org](#)
2. Contact your embassy, or in the U.S., write to your [senators](#), [congressional representatives](#), [White House](#) or other local elected officials.
3. Lead scholarly discussion at the AOM Annual Meeting and via the [listservs](#).
4. Make a donation to a human rights advocacy group or other cause that you strongly feel may effect change.
5. Initiate research the impacts of current events on organizations, workforces, academic institutions, etc.

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