Supplemental Information, Part 1

Diversity, Equity and Inclusion and Operations Management: Critical Linkages and Research Opportunities

Sriram Narayanan

Charles J. Corbett[1]

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Abstract

This document contains supplemental information about the philosophy and methodology behind the POM special issue on "Diversity, Equity, and Inclusion in Operations and Supply Chain Management", and an overview of the papers included in the issue. This Supplemental Information was prepared by Sriram Narayanan and Charles Corbett; the other authors of the paper "DEI and Operations Management: Critical Linkages and Research Opportunities", to which this document is added as Supplemental Information, were not involved and are not responsible for its content.

1. Introduction

This document describes how this special issue on "Diversity, Equity, and Inclusion in Operations and Supply Chain Management" was put together.

Why this special issue? The area often referred to as "DEI" for diversity, equity and inclusion has attracted tremendous attention in management theory and practice. Even since the call for papers was published in Winter 2022, the discussion has intensified. Traditionally, DEI is often thought of primarily as a human resources / organizational behavior issue. However, it interacts with operations and supply chains in various ways, some of which we already know but many others are not yet understood. This special issue explores these interactions between DEI and operations and supply chain management (OM/SCM). Some authors have already highlighted links between OM/SCM and DEI. Esper et al. (2020) highlight the issue of racial inequity in logistics and supply chain management; Sordi et al. (2022) urge a change of mindset from supplier diversity initiatives to one economic inclusion of suppliers. Sunar and Swaminathan (2022) lay out a research agenda for socially relevant and inclusive operations management; Silva et al (2023) call for more research and attention to issues of social sustainability in

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[1] Both editors contributed equally to this paper and to the special issue. The editorial included in this special issue is Corbett, Narayanan, et al., so we reversed the sequence for this Supplemental Information.

supply chains; Tang (2023) presents research opportunities in DEI. Corbett (2023) explores the linkage between operations and well-being of individuals, groups, and society. Murphy and Roy (2021) present challenges for LGBTQIA individuals. Despite several studies calling for more work around various aspects of DEI and OM/SCM linkages, systematic inquiry into different aspects of DEI continues to lag. We hope that the papers collected in this issue demonstrate the exciting breadth of important and intriguing questions waiting for OM/SCM scholars to tackle.

Finally, why the journal Production and Operations Management? POM has a long history of openness to experimentation and innovation and is therefore a natural home for an issue bringing together multiple voices on DEI.

2. Philosophy underlying this issue

In crafting the special issue, we identified two fundamental interrelated guiding principles:

- A special issue should include at least some papers that would otherwise not have been published in that journal. Otherwise, why bother with a special issue? This is particularly critical to advancing the conversation on an emerging important topic such as DEI.
- The special issue should create a space for furthering research and academic discourse in DEI (hopefully) resulting in substantial and substantive future research. As an emerging topic we aimed to include issues that may not yet fit in the conventional format of a 32-page POM paper, yet had potential to influence future work in OM.

The next section explains in more detail how we operationalized these principles. Several other guidelines followed naturally from the fact that POM agreed to host the special issue. First, all papers had to have a connection to OM. We interpreted "connection to OM" broadly, but without some OM angle, POM would not be the appropriate outlet. One objective of the special issue, as stated in the CFP, is to diversify the research that is already being done on DEI in OM/SCM, and to include a broader range of perspectives and methodologies in this domain. This goal was motivated by the fact that DEI as a research domain is multi-disciplinary. Submissions should also be well-grounded in the other relevant literatures, e.g., in disability, healthcare, entrepreneurship, organizational behavior, sociology, anthropology, political economics, or other, in addition to OM/SCM.

Second, all papers had to be of high quality. POM is a premier journal in the OM field, and we aimed for this special issue to further reinforce that position. This creates an immediate tension between our desire to be inclusive to topics, methods, observations, arguments and styles that are not (yet) represented in the mainstream OM literature, while at the same time maintaining high standards; top journals are, by

definition, exclusive as they reject most submissions. In the next section, we explain more how we tried to thread this needle, among others by piloting a new article format (new for POM at least), following a heavily developmental approach to the review process, and by offering copy-editing services for all accepted papers.

3. Approach and methodology

Next, we summarize the three strategies we followed to operationalize the guiding principles outlined above.

3.1 Diversity in article types

First, we conjectured that there would be numerous topics related to DEI that would have important implications for OM/SCM but for which the data or theory did not yet exist to produce a conventional full-length POM paper. Providing a platform for these ideas can substantially enrich the academic discourse on DEI and OM/SCM. To allow such topics to be introduced to OM scholars, we added an experimental paper format, "analytical essays and brief reports," which would be shorter papers that could educate the broader OM/SCM community on the potential implications of DEI for OM/SCM. Leading journals in other fields (such as medicine and the sciences) have a much wider range of article formats than we do in OM, as Fisher (2007) also points out in his comparison of the fields of OM and medicine.

In the CFP, we described these analytical essays as follows: "The articles in this category should be no more than 3000 words, including motivation, a brief literature review (that makes appropriate connections to OM/SCM and other disciplines), critical analyses (which could be based on arguments and potentially raw data but do not necessarily include detailed statistical or mathematical analysis), and implications for OM/SCM. An analytical essay can be based on careful analysis of existing literature with translation to implications for OM/SCM; a brief report will be based on observations from practice." We hope and expect that several of the analytical essays in this special issue will also rapidly be well-cited, advancing the scholarly analysis of DEI in OM/SCM while further enhancing POM's status as a premier journal. We finalized the format after discussions with the Editor-in-Chief and Deputy Editor of POM, who approved this experiment.

We asked for research papers to be shorter, where possible, in the belief that they are often more impactful, more enjoyable to read, and more accessible to researchers and scholars outside OM, and hopefully cited more. Spiegel (2012) observes that papers have become longer over time and that the additional pages are often of relatively little added value. Despite our emphasis on shorter papers, many papers did become longer during the review process (precisely what Spiegel describes).

To attract a more diverse group of authors, we advertised the CFP not only through standard OM channels (including POMS and other OM-focused listservers) but also to groups focusing on disability, health, and others at the American Sociological Association and the Society for the Study of Social Problems, and to the PhD Project, based on suggestions from colleagues who are active in DEI research.

3.2 Developmental review process

For an issue like this, we needed a particularly diverse, broad-minded and insightful team of Senior Editors. To identify potential SEs, we looked at those who had written articles on DEI in OM or adjacent fields, who were involved in DEI-related initiatives or had served on DEI-related committees at the main OM societies, and we asked some of our colleagues with expertise in DEI for recommendations. We paid attention to the mix of SEs, including their geographical location, seniority, gender, ethnicity, methodological focus, and, most importantly, disciplinary background. Collectively, the SEs brought a far wider range of expertise and experiences than the two of us could. We recruited a team of 22 SEs whose knowledge and expertise were invaluable in putting this issue together, and the vision editorial.

In light of our seemingly conflicting objectives of including some papers in the special issue that would not have been published in a regular issue, without lowering standards, we had to take a particularly hands-on and sometimes developmental approach to the review process. We followed a different process for the research articles and analytical essays - more on that below - but some of our guiding principles applied equally to both. On the one hand, we sought to follow the advice in Spiegel's (2012) editorial "Reviewing Less --- Progressing More", which makes a plea to accept papers that are "good enough" rather than perfect. Among others, that means limiting the number of rounds of review to the minimum possible. On the other hand, adhering to that too rigorously would have meant either rejecting several papers that made compelling observations but that were not yet fully developed, or accepting papers that many readers of POM would have felt did not meet the journal's standard. Overall, we were more concerned about the risk of rejecting a submission that contained a great idea but that was not yet adequately executed than about possibly accepting a paper that might later turn out to be less than perfect. Therefore, we balanced adherence to Spiegel's views with, in some cases, a strongly developmental approach; the positive experiences Ragins (2017) reports after adopting developmental reviewing at the *Academy of Management Review* are consistent with what we have seen. This means that some papers were accepted relatively quicker, without having exhausted the universe of possible robustness checks. In contrast, others underwent 3 or 4 rounds of reject-and-resubmit and major revisions.

The conventional research papers followed the usual POM review process: we assigned them to an SE, who recruited two or three reviewers. For the analytical essays, we needed a different process, as we expected it would be impossible to explain our goals for this format to all reviewers; we also wanted to make sure that the essays were all reviewed by relatively senior scholars who could evaluate them from a broader and more high-level perspective than is sometimes the case with (often more junior) reviewers. Therefore, for each essay, we invited feedback from one or more SEs, often complemented with one or more senior scholars with particular expertise in that topic. We asked them for a relatively high-level commentary by providing them with a consistent set of questions to use in their evaluation of the paper.

We both discussed SE assignments and drafted decision letters jointly for all submissions. When we disagreed on a paper, we spent several hours on calls discussing its merits and contributions relative to the special issue goals detailed earlier before we would draft our reports, often over several iterations. Though our approach to reviewing sometimes slowed the process down, this extra (collective) scrutiny and the more deliberative process are consistent with the goals of DEI and, hence, appropriate for this special issue.

We followed the guidelines given to us by the POM Editor-in-Chief and Deputy Editor regarding conflicts of interest (COI) and took a broad view of what might pose a COI. Any submission where one of the authors had a COI with one of us was handled exclusively by the other editor. The editor with the COI had no input or visibility into those submissions until after the final decision was entered. Any paper that had a COI with both of us would be handled by the Deputy Editor, but we had no such case.

In the end, the final acceptance rate for this special issue is higher than average for POM. On the other hand, if one counts the reject-and-resubmit decisions, the rejection rate was also high. For the 113 submissions, we as guest editors wrote more than 500 pages of review reports in addition to the often excellent and detailed reports from reviewers and SEs.

3.3 Short papers and copy-editing

To help authors meet our goal of keeping papers shorter than is the norm in OM, we decided to offer copy-editing services to all authors of accepted papers. We engaged Cambridge Proofreading for this work, and Michigan State University (MSU) and the University of California, Los Angeles (UCLA) – our respective institutions – generously agreed to cover the expenses involved.

Despite the objectives and approach outlined above, most submissions were inevitably rejected, including many that were compelling and that had notable strengths. Typical reasons for us to reject papers included lack of fit with DEI or lack of clear connection with OM, as well as the reasons related to

data, execution, and methods. Some papers had to be rejected after two or three rounds of review if they were not progressing enough. By contrast, some of the papers that we are most pleased about initially received a (near-)unanimous reject recommendation, but after several rounds of extensive revision ended up attracting very favorable comments from reviewers and SEs. Undoubtedly, some authors and some readers of POM will disagree with some of our decisions, both acceptances and rejections, and undoubtedly, we have made some mistakes along the way, but we want to assure every author who submitted to the special issue that it has not been for lack of effort.

4. Outcome and contents

The special issue has a collection of 40 excellent papers, including 17 analytical essays. The special issue has contributions from 135 unique authors (not counting the editorials), with representation across North America, Europe, Asia and South Asia. 55% of the authors published for the first time in POM. We summarize the key highlights of the research papers in Table 1 and of the analytical essays in Table 2. In addition to summarizing highlights, we also classified each accepted research paper into the four broad themes of DEI that the vision editorial articulates for OM/SCM -- i.e., Workforce, supply chains, health and society, and technology, platforms and innovation. We note that the development of the classification in the vision editorial, and our attempt at classifying all the accepted papers are somewhat post-hoc. In that sense, our classifications of accepted papers in Table 1 and 2 can also be seen as a validation of the overall framework in Corbett et al. (2024).

Authors	Highlights	WF	SC	HS	TPI
Aral and Van Wassenhove (2024)	Participants in experiments are significantly less likely to source from a supplier when a sales manager has a distinctly black name than a white name.		x		
Attari et al. (2024)	Supply chain complexity contributed to the severity of the opioid crisis and the effect is stronger in non-White communities.		x	x	
Baghersad et al. (2024)	Develops optimization models that balance horizontal and vertical equity and efficiency in prioritizing stormwater infrastructure improvement projects in the face of extreme climate uncertainty using City of Miami as a case study..			x	
Balakrishnan et al. (2024)	Consumers in experiments respond positively to workforce diversity disclosures even if they show disparities, valuing progress in DEI initiatives over absolute numbers in disclosures.	x			
Ball et al. (2024)	Text analysis of WebMD drug reviews written by females predict serious recalls, while reviews from males do not.			x	x
Canellas et al. (2024)	Proposes Mixed Integer Linear Program that improves emergency department throughput and wait times while ensuring fairer outcomes.			x	
Cen et al. (2024)	Text analysis of online job postings demonstrates that suppliers follow Equal Employment Opportunity policies of their customers especially when customers have large bargaining power.	x	x		x
Cheng et al. (2024)	Finds significant disparities in emergency department disposition decisions by gender, race, and ethnicity, and ED crowding may exacerbate these.			x	
Darby et al. (2024)	Experiments show that young participants respond negatively to job offers from firms accused of corporate social irresponsibliity in their supply chain.	x	x		
Demir et al. (2024)	Formulates optimization problems to help a host country improve inclusion of refugee children in its education system, using Turkey as example.			x	
Goradia and Byron (2024)	Data on over 10 million patients shows that physicians in more diverse departments experience better patient outcomes.	x		x	
Jetley and Zhang (2024)	Black patients in ICUs receive fewer pain measurements than White patients and experience higher 30-day readmission rates.			x	
Karimi and Roy (2024)	Countries with a female vs. male health minister procure 66% more contraceptives, and even more with greater female representation in parliaments.		x	x	
Li et al. (2024)	Using structured topic modeling and event study methods, shows that announcements of DEI commitments lead to abnormal stock returns especially if there is clarity with regard to specificity of DEI initiatives.	x			
Liu et al. (2024)	Returns to digital skills (measured as wages) in India are greater for individuals of lower castes, and even greater for women of lower castes.	x			x
Liu et al. (2024)	Proposes a distributionally robust optimization approach to help a utilitarian decision-maker arrive at more fair decisions.			x	
Loske et al. (2024)	Warehouse workers improve order-picking task performance when their in-aisle travel direction coincides with their native language writing direction.	x			
Paraskevas et al. (2024)	Online spending data covering 148 retailers shows that a strategic focus on e-commerce fulfillment can mitigate the negative effect of the digital divide.		x		x
Polyviou et al. (2024)	Federal spending data show that set-asides help small and diverse suppliers receive more complex contracts and lower cost overruns and delays.		x		
Rosenzweig et al. (2024)	Shows that minority workers perceive service quality differently and finds that codified policies and procedures improve frontline workers' assessments of guest service equality.	x			
Son et al. (2024)	Restaurants identified as Black-owned on a platform receive more reviews but lower ratings, contrary to the intention of such identification.				x
Sunder et al. (2024)	Balanced-gender teams achieve better operational performance in lab experiments than other mixed-gender teams, by forming routines faster.	x			
Wang et al. (2024)	Racial bias in pulse oximeter readings contributes substantially to the higher ICU mortality experienced by nonwhite sepsis patients.			x	x

Note: the columns at the right indicate which of four domains each paper is most closely related to: workforce (WF), supply chain (SC), health and society (HS), or technology, platforms and innovation (TPI). For references see Corbett et al. (2024).

Table 1: Overview of research papers

Authors	Highlights	WF	SC	HS	TPI
Arora (2024)	Argues that OM research can pay greater attention to LGBTQ+ clients and employees in workplaces and global supply chains.	x	x		
Berenguer et al. (2024)	Finds rapid increase in supplier diversity initiatives among Global Fortune 500 firms, with some regional and sectoral variation.	x	x		
Bodrožić and Gold (2024)	Explores the effects of laissez-faire, regulatory and transformative approaches to public policy on implementation of DEI practices in OM.			x	
Brennan (2024)	Argues that OM should re-engage with urban planning as it did during 1950-1970 to help planners make cities more livable and equitable.			x	
Breugem et al. (2024)	Argues that humanitarian logistics should recognize distributional preferences of communities they serve to increase inclusivity in aid distribution and avoid future conflicts.		x	x	
Gazdag et al. (2024)	Argues that humanitarian organizations should focus on inclusion in between disasters to reduce tensions between locals and expatriates during disasters.	x		x	
Glover et al. (2024)	Proposes framework for SMEs to balance financial, fairness, and community-based priorities; argues that serving vulnerable users may contribute to all three.			x	
Hamilton et al. (2024)	Interviews with 100 food bank personnel reveal shift towards greater inclusivity and use of personalized metrics rather than a narrow focus on pounds served.		x	x	
Hill et al. (2024)	Interviews highlight challenges faced by minority-owned suppliers in gaining access to and developing their relationship with large purchasing organizations.		x		
Johnson et al. (2024)	Examines opportunities for OM/SCM research to increase engagement with DEI through development of a novel rubric.	x	x	x	x
Matthews et al. (2024)	Argues that instrumental and justice logics offer conflicting perspectives on DEI and proposes paradox and dialectical perspectives to resolve these tensions.	x	x	x	
Metters and George (2024)	Reviews how theories, data and topics from the academic discipline of women's studies can enrich OM research in various ways.	x			
Ornelas et al. (2024)	Interviews tribal casino executives to reveal performance implications of preferential hiring practices, and the consequent OM problems they present.	x			
Pettis et al. (2024)	State-level spending data show that businesses owned by white women benefit more from supplier diversity programs than those owned by ethnic minorities.		x		
Shalpegin et al. (2024)	Argues that sanctions and boycotts can have unintended consequences for vulnerable populations elsewhere in the supply chain.		x		
Sodhi (2024)	Presents evidence of the negative effect of micro-aggressions on an organization, and proposes that continuous improvement initiatives can mitigate these.	x			
Thornton et al. (2024)	Explores the experience of minority frontline workers in interracial service encounters and how OM can research can better account for these.	x			

Note: the columns at the right indicate which of four domains each paper is most closely related to: workforce (WF), supply chain (SC), health and society (HS), or technology, platforms and innovation (TPI). For references see Corbett et al. (2024).

Table 2: Overview of analytical essays

5. What we learned

We hope that many scholars will learn from the papers in this special issue. As guest editors, we learned a lot from the process of assembling this; here are some of our takeaways.

First of all, DEI is a rich area of research within OM/SCM. Deeper engagement with the principles of DEI can enrich OM/SCM research, and OM/SCM can contribute to the goals of DEI

We learned that trying to implement the principles of DEI in practice can be challenging, despite all the best intentions. Although we tried to define the "analytical essays and brief reports" category as precisely as possible, it was difficult to specify our expectations with as much precision to authors and reviewers as we would have liked. There was an element of "we'll know it when we see it" than we would have liked, but that may be inevitable given the experimental nature of this format. We relied heavily on the SEs' and reviewers' reactions to the essays, though we also disagreed frequently when we saw a clear kernel of an important idea that needed help to come through more clearly in our own joint discussions about the merits of each paper.

We had aimed to keep papers shorter than usual, to make them more accessible for readers (and following Spiegel's (2012) observations), so we included targets of 4,000 words for research papers and 3,000 for essays, a departure from traditionally longer papers in OM. Some authors followed these closely, but then ran into trouble with reviewers who commented that too much detail was missing from the paper. We also observed that there may have been some inequity between authors who adhered closely to the guidelines, while others took our guideline of "preferably" no more than 4000 words" as a license to submit much longer papers, though even those authors did usually try to keep their papers shorter than they might otherwise have done. We took great care that such different adherence to our guidelines did not impact the decisions on papers submitted.

One risk in taking a developmental approach to reviewing that we do not yet have a satisfactory solution for is that of having to reject a paper in a second, third or even fourth round if it is not progressing enough. In some such cases, the authors arguably did not revise their work as thoroughly as was requested, but in others it was also due to us not being able to specify the goals precisely enough. Late round rejections are very painful, for both authors and editors. Before embarking on a developmental reviewing journey, it might be beneficial to think in advance about how to minimize the risk of a late-round rejection but also how to make it less difficult when it does become necessary.

One wrinkle related to conflicts of interest occurred when we started planning to co-author a thought piece on DEI in OM with all the SEs. We felt strongly that the two of us cannot possibly cover the full breadth of "DEI and OM/SCM", so rather than having the two of us try to write an editorial vision piece, it would be more insightful to do so jointly with the full team of about 22 SEs, who together represent a much wider set of perspectives and experiences. Inviting the SEs to co-author with us introduced a potential conflict-of-interest between us and all participating SEs. We had not anticipated this before initiating the joint article; when we discussed this with the Editor-in-Chief and Deputy Editor of POM, they agreed that this type of collaboration on a multi-authored editorial vision piece did not automatically pose a COI between the participating authors. We contacted the Editors-in-Chief of several other OM journals, who also agreed with this interpretation. Other fields, including in medicine and the sciences, have more experience with large teams of authors, sometimes to the point where almost everybody who works in a particular specialty domain has co-authored with each other; some journals in those areas have more nuanced rules about how to handle COIs. In this case, the extent of collaboration between us and the SEs on the thought piece was modest, and not comparable to a typical collaboration in the case of a paper with far fewer authors.

Overall, this was an eye-opening and inspiring exercise, and although we learned a lot in the process, we are now even more aware of what we do not know. We hope that this issue will contribute towards greater diversity, equity, and inclusion in OM/SCM, through the papers it includes as well as through some of the unconventional approaches we took to assembling the special issue.

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Supplemental Information, Part 2

Diversity, Equity and Inclusion and Operations Management: Critical Linkages and Research Opportunities

This supplemental information describes the timeline behind the creation of this article and our approach to conflicts of interest.

Timeline and process

When putting together the special issue, the two GEs invited 22 OM scholars to serve as SEs. The SEs were selected based on their demonstrated interest in DEI, in research and/or service; Supplemental Information Part 1 describe the process in more detail. In a conversation during that recruitment process, one of the SEs inquired about the possibility of writing a thought piece on DEI in OM jointly with all SEs, a notion the GEs had also already loosely entertained. Once the special issue was underway, all SEs were invited to participate in this joint vision piece if they wished; a few declined. On January 9, 2023, we asked all SEs to suggest topics to consider including in this article, in the form of a sample subsection heading with the first sentence of that subsection. We gave the following example: "Company vs. country culture"; "In this subsection we explore what is known about the extent to which the Toyota Production System is tied to Japanese culture vs. a company culture that can readily be transported to other countries." We received 64 topics; we created a Google Jamboard with a sticky note for each topic heading. To jointly structure these topics, we invited the SEs to participate in interactive Zoom sessions on May 2 and May 4, 2023, in which we asked them to jointly rearrange the sticky notes in whatever manner they felt was meaningful. 13 SEs participated across the two sessions. Topics such as "workforce" and "health" emerged in one session, while for instance "supply chain," "technology" and "education" emerged in both.

The GEs prepared two Google documents using the clustering of topics that emerged from the two jamboard sessions; one document (two pages) contained only the tentative cluster names identified by the SEs, while the other (11 pages) also included all topics and text initially suggested by the SEs, organized within that structure. These were shared with the SEs (together with pdf documents capturing the results of the two jamboard sessions) for feedback, on May 24, 2023.

After a hiatus of several months, the GEs incorporated the feedback and iterated to create an outline of this article. We indicated in the document which text each SE had offered to provide, and shared this with

all SEs on February 4, 2024, asking them for their contributions. The SEs provided their text directly in the Word document and offered additional thoughts by email. The GEs integrated all suggestions and prepared a first complete draft, which was circulated as a Google document to all SEs for feedback. The SEs provided their comments in the Google doc. The GEs closed the Google document for editing, and prepared an updated draft based on all the comments and suggestions received. That draft was circulated to back to the SEs for approval or final suggestions. The final draft was circulated to all SEs for approval. All SEs who are listed as co-authors have approved this version, though undoubtedly some of them would have preferred to express some thoughts differently.

Conflict of interest

The intention of this process was to be as inclusive as possible, but one consequence the GEs had not considered when starting this was the introduction of a complex set of potential conflicts of interest (COI) among all participating authors. Several SEs had submitted papers to the special issue, which were reviewed by other SEs and by the GEs themselves. Under a strict interpretation of the conflict-of-interest policy in place at POMJ, all such submissions would have to be transferred to the Editor-in-Chief and Deputy Editor of POM for further handling. However, given the unconventional nature of this collaboration and the minimal direct interactions between the SEs in its creation, the GEs felt that this co-authorship might not constitute the same level of COI as co-authorship on a more conventional paper. The GEs contacted the EIC and the deputy EIC of POM to explain the challenge emanating out of this multi-authored paper in a zoom call; the EIC confirmed that they agreed to our request that "the POM journal does not consider this collaboration on this thought piece for the special issue on DEI to create a COI between the SEs and/or between them and us, for the purpose of the special issue and for the purpose of future submissions to POM by any of the SEs."

Policies on "competing interests" regularly refer to "close collaborator" rather than "co-author," recognizing that not all co-authors are necessarily "close collaborators"; some journals explicitly acknowledge that competing interests cannot always be avoided but should at least be disclosed.