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## Using “Panel Reports” to Advance Scholarly Discourse: A Change in Editorial Policy and Guidelines for Panel Report Authors

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## Using “Panel Reports” to Advance Scholarly Discourse: A Change in Editorial Policy and Guidelines for Panel Report Authors

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### Abstract:

“Panel reports” reflect a particular category of submissions that authors can make to the *Communications of the Association for Information Systems (CAIS)*. As the CAIS website states, panel reports (i.e., papers that report on panels, debates, symposia, workshops, and similar events) differ from traditional research papers in that they “have to clearly position the matter of discussion at the event, highlight the relevance of event and topic and outline the different views on the topic that emanated at the events” (see [https://aisel.aisnet.org/cais/panel\\_reports.pdf](https://aisel.aisnet.org/cais/panel_reports.pdf)). While this definition has persisted for some time and still holds true, it leaves room for interpretation as to what constitutes a contribution and how one knows that a particular paper has made enough of one. In this editorial, we interpret and elaborate on these principles based on our collective experience with such reports.

**Keywords:** Editorial, Panel Reports, Panel.

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## 1 Introduction

Throughout the last few years, the *Communications of the Association for Information Systems (CAIS)* has published reports based on panels held at leading conferences such as the International Conference on Information Systems (ICIS), European Conference on Information Systems (ECIS), Pacific Asia Conference on Information Systems (PACIS), Americas Conference on Information Systems (AMCIS), and Australasian Conferences on Information Systems (ACIS). These reports do not typically undergo peer review; however, an associate editor (AE) usually reviews them. For quite some time, *CAIS* followed a more or less informal rule to publish panel reports after one or two rounds of editorial review based on the rationale that panel reports essentially reflected the actual live sessions that they reported on. Once authors clarified key issues and made panel reports readable, the journal would typically accept them. Occasionally, these revisions required major reworking because, frankly, some submissions lacked adequate quality. However, because the journal received few panel reports as compared to overall submissions and because we considered the panel report format interesting, we wanted to publish them in *CAIS*.

We have been finding ourselves less comfortable with the abovementioned norm over the past few years partly because we have received an increasing number of panel reports. While this increase has allowed more people to “virtually” benefit from the information systems (IS) field’s rich tradition of excellent panel discussions, it has also highlighted a broader variation in the reports themselves. While some panel reports blandly describe events, others create enthusiasm and really highlight debates in the field. Thus, in large measure with this editorial, we focus on moving our panel reports’ general tone and content toward the enthusiasm and enlightenment side and away from the archival and routine. Currently, Christoph Peters and Lauri Wessel serve as associate editors (AEs) dedicated to handling panel reports. Together with former Editor-in-Chief Jan Recker and current Editor-in-Chief Fred Niederman, we noted various problems with materializing our desire for thorough panel reports that added value to current scholarly debates in the IS field. We voiced these issues at the *CAIS* editorial meeting at ICIS 2019 in Munich, Germany, which resulted in a lively discussion about how we handle panel reports that led up this editorial.

Due to these observations, we felt that we needed to openly and transparently suggest more specific ways to enhance panel reports both for initial submission and eventual publication. Toward this end, we present criteria, ideas, and tips in this paper.

We first make a short note on terminology. In the past few years, *CAIS* has published different types of reports, such as panel reports, workshop reports (Chughtai et al., 2020), professional development workshop (PDW) reports (von Briel et al., 2020), and other reports (Beath, Chan, Davison, Dennis, & Recker, 2021). While we think that the recommendations we express below will generally concern all these different types of reports, how they matter and how authors can execute our recommendations may vary across them. Authors may closely reflect on our recommendations and check for how they map to their efforts to organize gatherings and write the according reports. In turn, in this editorial, we use the term panel reports in an inclusive manner to cover all different types of reports that *CAIS* has published thus far.

## 2 Essential Trajectory

Some panel reports arrive as fairly “bald” papers that merely describe a topic area and panel members’ initial positions. We have traditionally asked authors to make any necessary revisions to such reports for readability and contextualization of key themes in their introductions and conclusions. Although papers on submission may reproduce sessions to a reasonable degree, we find too often that they leave opportunities open to expand on and strongly highlight the topic(s) they address. In planning a panel presentation, of course there is no obligation to plan a panel report to follow but considering how a panel might lead to new knowledge and further distribution to the community is often warranted.

Throughout the revision process, in addition to requesting routine wording changes, we generally also request panel report authors to add background information about or reasons for the multiple positions on the controversy their paper addresses, to add background information about precursor knowledge for panel members’ content, and to discuss current issues that the event (panel, workshop, etc.) did not address (as one would expect due to the limited time and number of positions that panel sessions can accommodate). Additional work often includes suggestions about ways to integrate diverse viewpoints

and about future research that focuses on both resolving differences and extending further into the domain's knowledge. We expand on target characteristics for increasing scholarly contribution to panel reports in Section 3. Note that, while authors should ensure panel reports stay centrally focused on the event that they report on and its content, they should allow room for material that adds perspective and introduces new vision (e.g., by consolidating panelists' opinions or by outlining how these opinions add to existing scholarly discussions or might inform future research activities) without turning the reports into issue essays.

We hope that this editorial will 1) help authors move their work further along the continuum from describing events to making fuller intellectual contributions and 2) explain why *CAIS* editors may increase the rate at which they decide to decline panel reports.

### 3 Principles for Writing a Good Panel Report

Our intent to improve the proverbial "punch" that panel reports make arose from our editorial experience with panel reports. As leading IS and management journals have a rich history of helpful editorials, we selectively draw on these important publications in order to organize our ideas here. Broadly, we structure our suggestions into three categories: motivating panels, paying attention to context, and minding the format. We hope that these ideas help future panel report authors to craft even better manuscripts.

#### 3.1 Motivating Panels

Panel report authors typically provide short sections that provide insights into why they organized a panel in the first place. However, *CAIS* readers require such sections to understand why they should care about a particular report. In this respect, panel reports resemble research papers in that, for both, "first impressions matter" (Grant & Pollock, 2011, p. 1). Therefore, similar to research papers, we do see merit in expecting that authors motivate panel reports properly by providing answers to three important questions (e.g., see Grant & Pollock, 2011): "who cares?", "why care?", and "what will we learn [from reading the report]?". Note that authors need not "hard code" answers to these questions need into text explicitly. However, readers will likely perceive a report as elegant if the report clearly includes these aspects from the outset. In this section, we make some suggestions for how authors may do so.

First, a successful panel report should **acknowledge prior topical knowledge**. Believe it or not, we do receive panel reports that carry no citations at all. A publishable panel report may at times refer to what is viewed as "common knowledge", but authors should be sensitive to readers outside of their specialty who may not be familiar with what is viewed as "common". The authors should err on the side of providing references to original sources and, thus, provide an "audit trail" for readers less familiar with the topic. When entering new intellectual territory, it is, of course, helpful to provide sources where they exist.

Clearly, many topics have a long history that panel reports lack the scope to fully recount. Ideally, authors can compress such background into a few paragraphs. We highly recommend authors use references to basic underlying and foundational materials liberally. Morana et al.'s (2018) report on tool support in design science research (DSR) exemplifies a panel report that showcases our thinking. They summarize an emerging consensus in DSR regarding how to conduct such research in order to point out a gap in knowledge about how IT-based tools can help researchers conduct DSR. Based on how they summarize these issues in their introduction, Morana et al. (2018) then review the panel that they held at DESRIST 2017 in Germany. Panel report authors should take this opportunity to lead readers to locate materials that illuminate, expand, and round out the discussion. Interested readers can track these materials down, while others (e.g., readers who already know about the topic or only want a briefing on it) may pass over them.

Authors may sometimes refrain from self-citations when writing a panel report. Even though excessive self-citations are obviously problematic, panel organizers often constitute (emerging) experts in a topic domain, which explains why one should see self-citations in such instances as less problematic. Likewise, *CAIS* deploys a single-blind review process so that editors also have a role in keeping self-citations at bay.

In addition to acknowledging earlier literature, authors should also **show direct relevance of the topic to the IS field**. Based on observation of panel reports received, we note that at times the panel content is at the periphery of, and perhaps even outside, the central core of IS concerns. We follow the work of Sarker, Chatterjee, Xiao, and Elbanna (2019) in positioning socio-technical studies as defining the field's core. We

also find it helpful to repurpose Rai's (2017) work on avoiding type II errors toward the design of panel reports to meaningfully advance IS: "For example, cybersecurity is of interest to criminologists, psychologists, computer scientists, and IS scholars" (Rai, 2017, p. vi). However, important differences in how authors set up IS papers (which include panel reports) compared to papers in these other fields exist. These differences become ever more important as interest in digital technology rapidly expands in fields such as marketing and management. We need to understand that, while digital technology attracts significant scholarly interest in many disciplines, the IS field has a distinct approach in how it addresses digital technology (i.e., by positioning it as the core research interest). Thus, while scholars may have an interest in topics that may pertain to the psychology of trust in the presence of talking robots, IS scholars, *CAIS* readers, and AIS members may or may not have a particular interest in such topics. Accordingly, panel report authors may find it helpful to spell out what connection exists. To continue the robot example, although authors may not manipulate the robots' characteristics, IS researchers could—and it would fall in the IS domain if they did—consider how variations in robots' capabilities interact with various types of human interaction. At times seemingly peripheral topics may simply need the authors to make explicit these connections to IS concerns.

### 3.2 Paying Attention to Context

One may read our points about how to motivate panels and the according reports as calls for decontextualizing panels in order to make their reports fit with general scholarly discourse. While we do make such a call, panels' face value also hinges on whether panel report authors meaningfully describe "the who, what, where, when, and how" (Bansal & Corley, 2011, p. 236) that played out during an event itself. Even though we cannot offer a finite boilerplate (Pratt, 2009) about how to convey contextual details in a panel report as we welcome their richness and diversity (see also, Bansal & Corley, 2011), we do point out some ingredients for showing that authors attended to context.

First, authors can convey a panel's context to the *CAIS* readership by **including participant material**. Many panel sessions run out of time for long comments, insightful or contrarian questions, and protracted discussion. However, panel report authors can usefully address this content by indicating additional areas of inquiry and providing longer and more detailed responses than the panel setting affords. Note that some comments and questions will likely lead to discussions that the research implicitly includes but that researchers generally filter out because they require them to consider "fuzzy", contingent, and not-yet-formalized analyses. Authors can skillfully use panel reports to raise new questions and to show current thinking on existing ones. For example, in their panel report on opportunities and challenges of entrepreneurial diversity in the digital age, Sundermeier, Birkner, Ettl, Kensbock, and Tegtmeier (2020) convincingly augment the panel content with challenges, opportunities, and future research questions.

Furthermore, panels live and breathe due to engaged discussions between panelists and participants. They may raise diverse viewpoints about a whole range of topics. As such, panel reports **should welcome and maybe even require opinions**. In our physical and behavioral science paradigms, we 1) like facts to speak for themselves, 2) reluctantly extrapolate beyond the facts, and 3) carefully draw conclusions from partial information. Likewise, in more social constructionist IS studies, we like to give voice to informants so as to let qualitative data "speak" and disclose a strong chain of evidence to readers. Despite the fact that researchers have some influence on data due to their involvement in the collection and analysis processes, we like to triangulate data and offer rich quotes in our manuscripts in order to show how we kept that influence at bay (Bansal & Corley, 2011; Pratt, 2009). Indeed, we should do so as we look to build a discipline on science using disconfirmation actively and confirmation tentatively. However, as researchers both using quantitative and qualitative methods, we gain insights from outside the data-collection and -analysis process. We observe not just the answers to survey questions but also sponsoring firms' reluctance to distribute them. We also encounter high hurdles when designing new IT artefacts and learn the hard way how the General Data Protection Regulation (GDPR) and security concerns form an integral part along the journey. Among other goals, a panel report needs to capture that knowledge that scholars gain working sometimes for decades on a topic that they cannot include in any single study. Sometimes, it can prove valuable to hear not only that a variable significantly predicts a following state but also speculations as to how that happens, why it is important, and what we might be able to do with it at some future time. Therefore, panel reports necessarily involve opinion but should embed these opinions in larger discussions in our scholarly field and indicate how opinions inform debates that the field currently encounters.



Panel reports can also voice **multiple views**. Not all panel sessions will be controversial. Perhaps everyone will agree that better connections between academics and practitioners benefit the IS field. But everyone will not likely agree on how to achieve these connections or on how much time and energy we should invest to achieve goals in this area. We do not seek the kind of bitter arguments one finds on sleazy daytime television shows but rather civil discussions from different perspectives. Some IS scholars have expressed irritation with how far the field has come from serving organizational IS practitioners while others believe the issue is minor relative to achieving one's personal goals. Perhaps other perspectives on this issue could also illuminate the issue's importance for readers, the positions on it, the main arguments for each position, and, even better, some positions that exist but that panel members did not represent or discuss. For example, in their panel report on electronic pedagogy and future business models of universities, Niederman, Butler, Gallupe, Tan, and Urquhart (2016) contrasted professors' with university administrators' views. These roles typically have different viewpoints about how to manage a university and teach. Panel reports in general benefit from including such diversity and contrasting viewpoints.

Finally, authors can consider **geographical relevance**, a context-related issue that adds to the abovementioned issues. While *CAIS* has a global readership, conferences such as AMCIS, ECIS, PACIS or ACIS deal with topics that might be particularly relevant for their corresponding region. Panel reports as a result may require some abstraction showing the relevance to other regions as well. Put differently, we urge authors to "control" for the geographical relevance in their panel reports by considering the general and global *CAIS* readership when writing their reports.

### 3.3 Minding Format

By "format", we do not refer to the formal *CAIS* prescriptions for setting up a manuscript for submission. Instead, we mean the format by which authors present and make an event's content accessible to the journal's readership. Generally speaking, our call to minding panel reports' format echoes the calls to present insights that strike a balance between accuracy, simplicity, and generality (Langley, 1999; Suddaby, 2010) in so far as panel reports should attract general IS readers' interest without requiring too much from them to understand. In this section, we translate the concepts accuracy, simplicity, and generality into some rules of thumbs that will hopefully help authors write panel reports.

First and foremost, **diversity matters**. It goes without saying that, in this day and age, scholars should design panels in such a way that they adequately represent our scholarly field in terms of race, gender, religion, and so on. Diversity relates to accuracy because our field contains diverse individuals who work in particular subject domains. Therefore, for panel reports to accurately represent the viewpoints on a given topic that circulate in our field, they require a balanced and diverse panelist composition. Since people of every ethnicity and perspective can participate as a member on every panel, we urge sensitivity to the possibility of alternative views.

As readers and editors, we value simplicity. Individuals find onerous sentences, paragraphs that do not build on each other, and other similar issues difficult to parse. This point applies equally to panel reports as it does to research papers. Thus, as editors, we have frequently asked authors to **make their panel reports easy to digest**. We want panel reports to send a clear and simple message that lands well with our readers. Authors may find writing such reports challenging because their event addressed complex and multi-faceted topics. Therefore, panel reports should make it as easy as possible to dive into the topic and its results, insights, and scholarly advancements. Making a panel report easy to digest also intersects with the other suggestions we make in Section 3. For instance, authors can provide frameworks that depict prior topical knowledge, that integrate additional participant material, that consolidate views about panel members' opinions and potentially controversial perspectives, and so on. They might also consider using tables or figures to help readers better understand their text.

In a similar vein, authors should keep their papers **short and sweet**. Panel report authors do not have to change the world and may condense their discussion on the event that they report on to its essential ideas, pointers to underlying foundational material, and implications.

Finally, as for generality, we would like panel reports to **emphasize takeaways**. Assuming that the discussion at an event raised robust questions that suggest follow up, what can the reader do with the information? What can general IS readers take away from a panel that they did not know before? Not everyone will care about blockchain technology but perhaps will care about how it may change some theories that we use in our field. In what way does a panel promote indications that blockchain may change the game in IS research? Furthermore, some readers of a panel report will want to follow up. For

example, in a panel report for a panel on grand challenges, authors might include contact information for scholars who have started groups such as green IS (even if panel members did not discuss it) to create an access path for readers to continue exploring this subject.

### 3.4 Recommendations by Stakeholder

Overall, we want panel reports that help readers take away value from reading them. In this section, we present some tips below for panel report authors, panel organizers, and readers to help them provide that value.

### 3.5 Authors

We have seen authors excellently organize their panel reports based on topic whereby they express each panelist's distinct viewpoint(s) and also integrate them. Authors may smoothly integrate all material or somehow distinguish what panelists presented at an event from what they added to their report. We also welcome details about the session itself (e.g., attendance, structure, surprises) in appropriate proportion and a brief note on the topic's scope and who the report addresses (e.g., specialists, multi-disciplinary audience, doctoral students, some combination).

Authors can validly begin drafting a panel report starting from the panel proposal, but, particularly when the proposal itself is published (as is the case with ICIS proceedings), we suggest that they focus more on the content that goes beyond or varies from the proposal. In our own experience, authors may find it helpful to make at least two tape recordings of a session—one from the back of the room and another from the front in case not everyone speaks loudly. This assumes a face-to-face setting. Alternative recording tactics may be required in the online or hybrid settings. It can help authors to follow up with contributing audience members by acquiring permission to use quotations or even inviting supplemental material to the panel report. In this way, a panel's transcript can be helpful, though as a starting point for developing the panel report, it can take a lot of work to skillfully transform them into clear and useful narrative text.

Many panel sessions target specialists in the field as would discussions about various theories that researchers have tested regarding compliance behaviors in cybersecurity. While appropriate for such sessions, we would look for connectors to position the discussion in its larger context (e.g., showing the trunk and major branches that lead to a particular "leaf" on the security "tree"). Non-specialists may need clarification about common terms in this field that participants do not discuss during an event (and individuals who read the paper 20 years later). To continue the security example, specialists will likely agree about security's importance (though not on specific approaches or findings), but the report should explain why to non-specialists. Obviously, we all have a stake in computing resources being secure, but why is a debate about motivations to comply or not comply with organizational policy an important component of that?

Of course, we can distinguish between opinion and facts. We all occasionally make small errors about, for example, a paper's citation count or its publication year during the heat of a panel discussion. Authors should ensure they correct these errors so they can move from reasonable estimates to exact figures. On the other hand, we encourage opinions but recommend that authors clearly identify them with wording such as "I/we believe that the basket of eight journals underrepresent grounded theory papers". If authors can add studies, references, or measures later, fine, as long as they clearly indicate the view constitutes their own opinion. We reserve the right to screen out insulting comments such as "I cannot agree with my idiot colleague". To be fair, we have not run into this sort of problematic content to date, but we would rather not start having to.

As with any academic writing, we encourage authors to liberally use figures and tables. Authors can sometimes copy them directly from panelist overheads (one should check on copyright if they download photos or clip art), and they should feel free to create original figures in PowerPoint or other packages to illustrate points particularly where linking ideas drawn from multiple sources.

### 3.6 Panels Organizers

We have observed that many attending panels welcome text that summarizes panel members' prior work and their current thoughts on a topic. They also welcome information about a topic's history and evolution. We believe that panels will be more interesting for attendees when: 1) the panelists add some updating

and further conclusions to their prior work, 2) panelists speak about and search for new understanding relative to the topic (e.g., “oh so, that’s what you meant when you wrote that...”), and 3) moderators encourage non-panelists to provide critique and comments along with questions. If a panel report primarily comprises only material that one can find in prior publications, it would not likely create sufficient value for publication. Note that reconfiguration, updating, and recontextualization are different from simply repeating prior work.

At times, it can be appropriate and valuable to repeat what is already well known. We do not wish to discourage everything that might make valuable panel sessions, but we will not likely favor panel reports that simply describe such events.

### 3.7 Readers

We see the panel report as a place to become quickly informed about the key issues and positions relative to a controversial, emerging, or extended topic. We cannot all become experts at the ever-increasing number of specialized topics in the IS field. However, while retaining and expanding deep knowledge of our chosen topics, we can also stay broadly aware of discourse in other areas in the field. Panel reports can also serve as an archive to remember issues from the past and to help researchers consider decide whether such issues deserve or need to be revived and enhanced. In this spirit, we look for panel reports that translate the enthusiastic discussions during sessions into approachable formats that provide background information and fill in content areas that participants did not specifically discuss during the session (e.g., if an event discussed only two arguments for studying crowdsourcing but ignored another one, we would encourage authors to at least acknowledge the additional argument—especially if researchers widely accept and do not really debate it). We encourage future research ideas that panelists would like others in the community to take up.

## 4 Concluding Remarks

In this editorial, we focus on clarifying our expectations towards future panel report submissions to CAIS and on providing guidance that will hopefully help authors meet these expectations. To summarize our ideas here, we include some key aspects that event (i.e., panels, workshops, etc.) organizers may want to keep in mind in Table 1.

**Table 1. Key Recommendations for Organizing Panels and Writing Panel Reports**

|                                   | Topic area                  | Key questions to ask  |
|-----------------------------------|-----------------------------|---|
| <b>General principles</b>         | Motivating panels           | <ul style="list-style-type: none"> <li>• Does the report acknowledge and cite earlier knowledge?</li> <li>• Does the report show the event’s relevance to the IS field?</li> </ul>  |
|                                   | Paying attention to context | <ul style="list-style-type: none"> <li>• Does the report include participant material?</li> <li>• Does the report voice and elaborate on opinions?</li> <li>• Does the report express multiple views?</li> <li>• Does the report control for the event’s geographical relevance?</li> </ul> |
|                                   | Minding format              | <ul style="list-style-type: none"> <li>• Does the panel reflect the IS field’s diversity?</li> <li>• Can readers easily digest the report?</li> <li>• Does the report emphasize takeaways?</li> </ul>   |
| <b>Particular recommendations</b> | To panel report authors     | <ul style="list-style-type: none"> <li>• Is the report organized well?</li> <li>• Does the report include comments that participants made?</li> <li>• Does the report reflect potential contradictions that emerged or participated voiced at the panel?</li> </ul>                         |
|                                   | To panel organizers         | <ul style="list-style-type: none"> <li>• Does the event’s design balance the history of the topic with new insights into it and updated information about the according scholarly discussion?</li> <li>• How will you acquire opinions and insights from non-panelists?</li> </ul>          |

With this essay, we contribute in three ways. First, we provide guidance for future panel report authors about what constitutes first-rate panel reports. Second, we hope that guidance in terms of policies and preferences for panel reports might assist organizers and planners such as conference organizers and conferences’ panel and workshop chairs. Our guidance might help them make decisions about how to position and leverage panels at their conferences. Third, we also provide hands-on practical advice for



panel stakeholders and encourage corresponding panel proposals and panel participation during conferences. Fourth, we stimulate thought about what panels are and can be so that they add value for presenters, participants, and subsequent readers.

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