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## Editorial Note: The IS History Initiative: Continued Efforts and Results

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## The IS History Initiative: Continued Efforts and Results

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### Abstract:

To build on the first *CAIS* special issue on IS history, this second special issue reports additional efforts and results on several aspects of the implementation of the strategic plan of the IS history initiative. Since the publication of the first special issue, I conducted several oral history interviews to collect the memories from pioneers in the IS field, including Gordon Davis, Gordon Everest, David Naumann, Jan DeGross, and Alan Merten. In this special issue, several papers cover a variety of issues about IS history, such as the rise of IS at the graduate school of management in UCLA, the IS field's intellectual and institutional structure, theory in North American IS research, historical roots and approaches to user satisfaction research, revolutionary approach to enterprise system design using resources-events-agents design theory, the evolution of human resource information systems research, green IS research, software piracy research, the role of doctoral consortium at major IS conferences, and a recollection of LEO in East Europe during 1963-1974.

**Keywords:** IS Discipline, IS Field, MIS, History, IS Research, IS Education, IS Theory, IS Doctoral Consortium, IS in Academic Institutions.

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## 1 Review of the IS History Initiative

To provide a context of the efforts and results reported in this second special issue, I first review the IS history initiative that I introduced in the first CA/IS special issue (Zhang, 2015a). In Section 2, I highlight the new items since the first issue published.

The IS history initiative has three goals:

1. To collect, represent, and preserve the IS field's history
2. To interpret, write, disseminate, and review the IS field's history, and
3. To discover/identify IS genealogy, roots, sources, and facets that deserve to be examined from a historical point of view.

IS history initiatives have three guiding principles:

- Multiple perspectives from multiple contributors on the same historical matters
- Being inclusive with a global view of the IS field, and
- Being open-minded and welcoming various views and suggestions on how to preserve IS history.

The IS history initiative has two priorities:

- To capture and/or create opportunities to secure historical sources or resources that may be under time pressure, and
- To focus on several high-profile aspects with key elements to test out and demonstrate possible efforts and methods and, thus, provide ideas for additional aspects and extensions.

The IS history initiative has a strategic plan with two parts. The first part is the action-oriented part (corresponding to the first two goals above; see Table 1), which has two aspects: a) collect, represent, and preserve; and b) interpret, write, and disseminate. The second part of the strategic plan is about the thematic areas (corresponding to the third goal; see Table 2). In this second special issue, new items include coverage on people, academic institution, intellectual element, education, and industry and practice. Bold text in the third columns in Tables 1 and 2 show these new items.

**Table 1. Action-oriented Part of the Strategic Plan for the IS History Initiative**

Ultimate goal	Mid-term objective	Sample short-term task
<b>A. Collect, represent, and preserve</b>	A1. Preparing legal and procedure infrastructure	<ul style="list-style-type: none"> <li>• Donation guidelines and procedures</li> <li>• Solicitation letter</li> <li>• Deed of gift</li> <li>• IRB approval</li> <li>• Identification of libraries and museums that may collect documentary and physical artifacts in the IS field</li> </ul>
	A2. Preparing technological infrastructure	<ul style="list-style-type: none"> <li>• IS history website</li> <li>• AIS e-library section</li> <li>• Mendeley collection</li> <li>• Facebook page(s)</li> <li>• A guideline for where to archive what in what way</li> <li>• An IT infrastructure for collecting social history (stories told by regular people)**</li> </ul>
	A3. Archiving events	<ul style="list-style-type: none"> <li>• PACIS 20-year history video at the 20th anniversary meeting</li> <li>• AMCIS 2013 IS history panel</li> <li>• GOOGLE video of LEO 60th anniversary celebration</li> <li>• ICIS 35th anniversary celebration video at ICIS 2014 meeting</li> </ul>
	A4. Archiving journals and conferences	<ul style="list-style-type: none"> <li>• A list of ICIS meetings since 1980</li> <li>• A list of AMCIS meetings since 1995</li> <li>• <i>MISQ</i> journal history</li> <li>• <i>JMIS</i> journal history</li> <li>• <i>THCI</i> journal history</li> </ul>

**Table 1. Action-oriented Part of the Strategic Plan for the IS History Initiative**

	A5. Archiving documents and artifacts	<ul style="list-style-type: none"> <li>• Some SIM annual meeting reports</li> <li>• Building, tagging/indexing, verifying, and updating Mendeley collection</li> </ul>
	A6. Archiving memories, oral histories, pioneers' life stories	<ul style="list-style-type: none"> <li>• Developing interview protocols (procedures, questions, logistics, media use, etc.) about things or career</li> <li>• Developing interview release form</li> <li>• Conducting, editing, and archiving interviews</li> </ul>
<b>B. Interpret, write, disseminate, and review</b>	B1. Events	<ul style="list-style-type: none"> <li>• ECIS 2013 panel on IS history</li> <li>• PACIS 2013 panel on IS history</li> <li>• AMCIS 2013 panel on IS history</li> <li>• ICIS 2013 forum on IS history</li> <li>• ACIS 2013 panel on IS history</li> <li>• ECIS 2014 panel on IS history</li> <li>• AMCIS 2014 panel on IS history</li> <li>• AMCIS2014 keynote section on IS history</li> </ul>
	B2. Writing and dissemination	<ul style="list-style-type: none"> <li>• ACIS 2013 track on IS history</li> <li>• AMCIS 2014 track on IS history</li> <li>• <b>CAIS special section and special issues on IS history</b></li> <li>• More IS journals to publish history related writings*</li> </ul>
<p>* In progress                  ** Future efforts</p>		

**Table 2. Thematic Coverage Part of the Strategic Plan for the IS History Initiative**

Perspective	Sample aspect	Sample collection/task and outlet
<b>People</b>	Influential figures	<ul style="list-style-type: none"> <li>• Phillip Ein-Dor, Andrew Whinston, Bill King, Eph McClean: their careers and views (interviews as oral history published in AIS e-library)</li> <li>• <b>Gordon Davis, Gordon Everest, David Naumann, Jan DeGross, Alan Merten: their careers and views (interviews as oral history published in AIS e-library)</b></li> <li>• 12 EICs from the first two IS journals (<i>MISQ</i> &amp; <i>JMIS</i>): their views and experiences (interviews as oral history published in AIS e-library)</li> <li>• AIS LEO award recipients' additional info (website)</li> <li>• AIS fellows*</li> <li>• AIS presidents*</li> </ul>
	Regular scholars**	<ul style="list-style-type: none"> <li>• Their views of and experiences with the IS history</li> </ul>
<b>Journals</b>	<i>MISQ</i>	<ul style="list-style-type: none"> <li>• The genesis of <i>MISQ</i> (a working paper)</li> <li>• Interviews of EICs as oral history (AIS e-library)</li> </ul>
	<i>JMIS</i>	<ul style="list-style-type: none"> <li>• Interview of founding EIC as oral history (AIS e-library)</li> </ul>
<b>Conferences</b>	ICIS, the first IS conference	<ul style="list-style-type: none"> <li>• A list of detailed info of all ICIS meetings since 1980 (website)</li> <li>• Photos from the planning meeting and the first meeting in 1980 (Facebook)</li> <li>• Recounting the first ICIS conference**</li> <li>• Recounting the first ICIS doctoral consortium**</li> </ul>
	AMCIS, the first one sponsored by AIS	<ul style="list-style-type: none"> <li>• A list of detailed info of all AMCIS meetings (website)</li> <li>• Recounting the first AMCIS conference**</li> </ul>
<b>Associations</b>	AIS	<ul style="list-style-type: none"> <li>• AIS 20-year legacy booklet (website)</li> </ul>
	IFIP**	<ul style="list-style-type: none"> <li>• IFIP TC-8</li> </ul>

**Table 2. Thematic Coverage Part of the Strategic Plan for the IS History Initiative**

<b>Academic Institution</b>	Business schools	<ul style="list-style-type: none"> <li>• Timeline and institutional roles (AMCIS 2013 panel)</li> <li>• <b>UMN MIS history (a panel interview as oral history published in AIS e-library)</b></li> <li>• <b>“The Rise of Information Systems at the Graduate School of Management, UCLA” (a CAIS paper in this second history special issue)</b></li> </ul>
<b>Intellectual element</b>	Intellectual core	<ul style="list-style-type: none"> <li>• IS history by highly cited papers during 1975-1999 (a CAIS paper in the first history special use)</li> <li>• <b>“A Historical Observation of Intellectual and Institutional Structures of the Field” (a CAIS paper in this second history special issue)</b></li> </ul>
	Sub-areas inside IS	<ul style="list-style-type: none"> <li>• <b>“Technical and Social History of Software Engineering” (a CAIS paper in the first history special issue)</b></li> <li>• <b>“User Satisfaction Research in Information Systems: Historical Roots and Approaches” (a CAIS paper in this second special issue)</b></li> <li>• <b>“Resources-Events-Agents Design Theory: A Revolutionary Approach to Accounting and Enterprise System Design” (a CAIS paper in this second history special issue)</b></li> <li>• <b>“The Evolution of the Field of Human Resource Information Systems: Co-Evolution of Technology and HR Processes” (a CAIS paper in this second history special issue)</b></li> <li>• <b>“Green IS Research: A Modernity Perspective” (a CAIS paper in this second history special issue)</b></li> <li>• <b>“Software Piracy Research: A Cross Disciplinary Longitudinal Literature Survey” (a CAIS paper in this second history special issue)</b></li> </ul>
	Regional	<ul style="list-style-type: none"> <li>• The origins of IS in different regions (ECIS 2013 panel)</li> <li>• <b>“Early History of IS in the UK” (a CAIS paper in the first history special issue)</b></li> <li>• <b>“Theory in North American Information Systems Research: A Culturomic Analysis” (a CAIS paper in this second history special issue)</b></li> </ul>
<b>Education</b>	Education programs	<ul style="list-style-type: none"> <li>• The evolution of IS education (ECIS 2014 panel)</li> <li>• <b>“The First Undergraduate Program in the IS Field” (a CAIS paper in the first history special issue)</b></li> <li>• <b>“The Role of the Doctoral Consortium: An Information Systems Signature Pedagogy?” (a CAIS paper in this second history special issue)</b></li> </ul>
<b>Industry and practice</b>		<ul style="list-style-type: none"> <li>• The historical development of industries’ and practice’s influence on the future of IS (AMCIS 2014 panel)</li> <li>• <b>“LEO in East Europe 1963-74” (a CAIS paper in this second history special issue)</b></li> <li>• SIM and its role in MISQ, ICIS, MISQE, and other aspects of the IS field**</li> <li>• CEOs’ principal concerns**</li> </ul>
<b>Timelines of IS field</b>		<ul style="list-style-type: none"> <li>• Timeline and institutional roles (AMCIS 2013 panel)</li> <li>• Multimedia interactive timeline for the field using Tiki-Toki (a link from website)</li> </ul>
<b>Methods for writing history</b>		<ul style="list-style-type: none"> <li>• How to best represent IS history (PACIS 2013 panel)</li> <li>• <b>“Historiography” (a CAIS paper in the first history special issue)</b></li> </ul>
<p>* In progress  ** Future efforts</p>		

## 2 Highlight of the New Items

In the rest of this paper, I highlight the new items since the first special issue published.

## 2.1 People in the IS Field

I have interviewed five pioneers as part of the AIS history initiatives about their careers and their views for the IS field (see Table 3). All interviews except the one for Alan Merten occurred in April 2015 in the Carlson School of Management where MIS program is located on the Minnesota campus. Alan's interview occurred in June 2015 on the Fairfax VA campus of George Mason University.

**Table 3. Reflections of the Pioneers**

Pioneer Name	Outcome
Gordon Davis	Oral history—video interviews (Zhang, 2015b, 2015c, 2015d)
Gordon Everest	Oral history—video interview (Zhang, 2015e)
David Naumann	Oral history—video interview (Zhang, 2015f)
Jan DeGross	Oral history—video interview (Zhang, 2015g)
Alan Merten	Oral history—video interview (Zhang, 2015h)

### 2.1.1 Oral History: Interviews with Gordon Davis

It would be very rare if a scholar in the IS field has never heard of Gordon Davis. Davis is truly one of the founding fathers of the field in a number of ways. He is widely considered an institution builder (Ives, Olson, & Weber, 2005). In 1967, together with Gary Dickson and Thomas R. Hoffman, Gordon co-founded the Management Information Systems Research Center and the master's and PhD programs in MIS at University of Minnesota. He headed the PhD program from 1968 to 1993 and served as advisor, co-advisor, or committee members to more than 100 doctoral students, many of which became high-profile IS scholars. Davis was instrumental as one of the masterminds for the vision, creation, publishing, and availability of the first IS journal *MIS Quarterly*, first published in 1977. He is among the founders of the first conference in the IS field, ICIS, and a co-founder and former president of the Association for Information Systems. At the intellectual level, Davis published several books in the 1960s on electronic computers and computer data processing and continued to publish books on computer programming languages FORTRAN and COBOL in the 1970s. His 1974 book and later editions on management information systems are largely considered the conceptual foundation book for the IS field. Davis became an AIS fellow and received the LEO award in 2000. Davis's contributions to the field are beyond specific outcomes or products, a position a 2005 *MISQ* editorial demonstrates (Ives et al., 2005). During multiple interview sessions, Davis shared some of his stories and views on several topics. Besides the early days of MIS in Minnesota and in the IS field (Zhang, 2015d), Davis shared the story of his own career choice (Zhang, 2015c). He also provided guidance on doing doctoral dissertations in the IS field (Zhang, 2015b), which complements his book, *Writing the Doctoral Dissertation—A Systematic Approach*. The book, originally published in 1979, received a third edition in 2012 (Davis, Parker, & Straub, 2012) and has been used by more than 60 thousands doctoral students all over the world.

### 2.1.2 Oral History: Interview with Gordon Everest

Gordon Everest had formal trainings in management and business, and became interested in using computers to help businesses during his undergraduate years in Canada. He programmed his first computer in 1960 and has been linked with the computer industry ever since. While at the Wharton School in University of Pennsylvania for his PhD under the supervision of James Emery, he taught programming language FORTRAN to the undergraduate students. Interestingly, the University of Pennsylvania, for the first time in its history, per Everest's petition and qualification, accepted this computer programming language as one of the two foreign language requirements in the PhD program. Everest became increasingly interested in data management, and his doctoral dissertation *Managing Corporate Data Resources* (1974) became a textbook from McGraw-Hill in print until 2002. Everest had many consulting experiences along his academic career in which he helped corporates, state legislation, and law firms to manage and use data wisely. He was heavily involved in several data-management associations including the Conference/Committee on Data Systems Languages (CODASYL), which was formed in 1959 to guide the development of a standard programming language for business that could be used on many computers. The effort led to the development of COBOL and other standards and the Data Management Association (DMA). Although he retired more than a decade ago, Everest has been passionately teaching data modeling and database management courses online to students and professionals all over the world.

### 2.1.3 Oral History: Interview with David Naumann

A native Minnesotan, David Naumann joined Navy and had a job as a computer technician in 1955. He then worked for UNIVAC (stands for UNIVersal Automatic Computer, now UNISYS), GE Computers, Honeywell Computers, among other computer companies from 1957 to 1969. With no formal degree and could not move higher in his computer career, he started his education with BA, MS, and PhD degrees, all from University of Minnesota. In fact, he received MS in MIS in early 70s as one of the earliest and few Masters graduates of the MIS program (the program did not last long), and the PhD degree (as PhD Graduate #19 in a list created and maintained by Jan DeGross) from the MIS program in 1977. Interestingly at the time, no one could figure out what a PhD in MIS could do in industry. So Naumann decided to join the faculty. He had taught virtually every IT and MIS courses offered. He founded and developed both undergraduate and MBA computing labs and managed them through the 80s and 90s. He played important role in the undergraduate curriculum and certificate programs for professionals over the many decades at Minnesota.

### 2.1.4 Oral History: Interview with Jan DeGross

In a unique and unconventional way, Jan DeGross has been well known in the IS field. Among IS scholars who have been in the field for a while, few have not heard or seen DeGross's name to say the least. DeGross joined University of Minnesota in 1973 "by accident". From one responsibility to another, she did many important supporting jobs during all these decades in the MIS program at Minnesota, and these jobs had profound impact on the IS field. She was instrumental in managing the PhD program at Minnesota that has produced many high-profile IS scholars. Many early IS scholars may well remember the MIS faculty directories that started in 1983 with 400+ people listed—an important milestone because it gave an identity and a sense of community to the IS field. For 19 years, the ICIS proceedings carried DeGross's name as the editor. She had edited the IFIP proceedings for more than 20 years. Many IS scholars may well recognize and associate her name with *MIS Quarterly*, the first and most prestigious journal in our field, for which she became the managing editor in 2000 and still does the job today.

### 2.1.5 Oral History: Interview with Alan Merten

Having been worked in the data services center in the Pentagon, Alan Merten developed an interest in computing and became one of the earliest academically trained computer science students, with a Masters degree from Stanford University in late 60s and a PhD degree from Wisconsin Madison in 1970. With a specific interest in applied computer science to math, engineering, and business, he had an unusual academic path from being in an industry engineering school to a business school. He witnessed the coming of computer technologies' being desired by not only engineering students but also business students and business executives in the 70s. He was one of those early pioneers in North America who would hear about each other's names on applying computer technologies to address business problems and who would have realized the need to get together as a unique group of people for a unique set of issues for research and teaching. Merten became one of the founding fathers who brainstormed the forming of the ICIS conference. He continued contributing to ICIS and eventually organized the third ICIS conference in Michigan. His career continued to becoming a dean at business schools in University of Florida and Cornell University and then the president of George Mason University for over 16 years. In the interview, he recalled his early days in the IS field and shared his views about how the IS field should move forward.

## 2.2 Academic Institution

### 2.2.1 Oral History - Panel Interview of the Early IS Scholars at University of Minnesota (Zhang 2015i, 2015j, 2015k)

The MIS program at University of Minnesota is widely considered one of the earliest programs in the IS field. Four original members of the MIS program (i.e., Gordon Davis, Dave Naumann, Gordon Everest, and Jan DeGross) reflected on the early days of Minnesota and the MIS program (Zhang, 2015i, 2015j, 2015k). The interview collects many interesting stories and historic moments.



### **2.2.2 Paper Preview: The Rise of Information Systems at the Graduate School of Management at UCLA (Swanson, 2016)**

University of California at Los Angeles is another institution that had the earliest IS program in business schools. Burton Swanson, one of the early members of the IS group, reflected on the IS program at UCLA through several stages: the rising years (50 and 60s), the formative years (70s), and the leadership years (80s).

## **2.3 The Intellectual Element**

Many scholars have thought about and researched issues related to the intellectual element of the IS history as reflected by the submitted and accepted papers in this special issue.

### **2.3.1 Paper Preview: A Historical Observation of the Intellectual and Institutional Structure of the Field (Grover, London, & Craig, 2016)**

After overviewing the historical evolution of institutional structures in the IS field, including academic programs, journals, conferences, and professional associations, Grover et al. (2016) turn to the more challenging side of the IS history: the intellectual structures. Using a co-citation lens, they find that the IS field has transitioned from a state of identification through fragmentation to greater integration.

### **2.3.2 Paper Preview: Theory in North American Information Systems Research: A Culturomic Analysis (Soper & Turel, 2016)**

Addressing the composition, consistency, and evolution of the theoretical core in the North American IS research, Soper and Turel use n-gram analyses to examine 2,215 papers published in three leading IS journals in a 24-year period. They identify the theories that constitute the overall theoretical core, the nature of theoretical pluralism, patterns of theory co-occurrence, and the evolution of the theoretical density over time.

### **2.3.3 Paper Preview: User Satisfaction Research in Information Systems: Historical Roots and Approaches (Vaezi, Mills, Chin, & Zafar, 2016)**

One of the longest topics in the IS field, user satisfaction research has attracted a lot of attention and a historical view of this line of research is well deserved. Vaezi et al. (2016) go to the intellectual roots of this line of research in reference fields and its appropriation to the IS context, the definitions, the measures, the antecedents, the outcomes, and related theories and paradigms. Despite its long time popularity, the authors believe that there are additional issues to be explored in this line of research.

### **2.3.4 Paper Preview: The Evolution of the Field of Human Resource Information Systems: Co-evolution of Technology and HR Processes (Johnson, Lukaszewski, & Stone, 2016)**

Human resource (HR) management is one area that applies information systems and technologies. Thus, HR information systems have become a niche area in the IS field. Johnson et al. (2016) examine the interplay between the evolution of technology and the HR field through four key eras of technology: mainframe, client server, ERP and Web-based systems, and cloud-based systems. They provide suggestions about how to move the HRIS area forward.

### **2.3.5 Paper Preview: Resources-Events-Agents Design Theory: A Revolutionary Approach to Enterprise System Design (Dunn, Gerard, & Grabski, 2016)**

The resources-events-agents (REA) framework, although less known and researched than some of the other design theories, was proposed more than thirty years ago and is considered one of the robust design theories. Dunn et al. (2016) describe the genesis and primary constructs of REA, its historical development, and its impact on practice. They also speculate on the future of REA-based enterprise systems and invite IS scholars to consider integrating REA constructs with other theories and technologies to help advance the future of information systems and business research.



### **2.3.6 Paper Preview: Green IS Research: A Modernity Perspective (El Idrissi & Corbett, 2016)**

Green IS is a relatively new area inside the IS field that reflects the IS community's response to improving the environmental effects of information systems and technologies. Idrissi and Corbett explore the evolution of green IS research based on published papers over a period of 15 years. They identify four patterns of modernity including the importance of the individual in solving environmental problems, science as the main sources of solution, reliance on technology, and growth as ultimate goal of business. They observe a trend of a hyper-modern perspective and suggest a future direction for green IS research.

### **2.3.7 Paper Preview: Software Piracy Research: A Cross-disciplinary Systematic Review (Chavarria, Andoh-Baidoo, Midha, & Hughes, 2016)**

Similar to many areas in the IS field, software piracy research is interdisciplinary, problem driven, and multi-faceted. The wide-ranged research by scholars in many fields has yielded a literature that is not integrated and not easy to make sense of. Chavarria et al. (2016) systematically review the published papers to address a set of questions on the intellectual and social elements of this research area.

## **2.4 Education**

Educating young generations to ensure future talents should always been a goal in any academic field. The same has been true in the IS field.

### **2.4.1 Paper Preview: The Role of the Doctoral Consortium: An Information Systems Signature Pedagogy? (Gable, Smyth, & Gable, 2016)**

Almost all ICIS conferences across the world share a doctoral consortium event. Gable et al. examine the establishment, evolution, significance, and impact of doctoral consortium at mainstream IS conferences at the international, national, regional, and local levels. A historical examination like this will provide not only an organizational memory for the field but also insight for improving future doctoral consortium at IS conferences.

## **2.5 Industry and Practice**

### **2.5.1 Paper Preview: LEO in East Europe 1963-74 (Land, 2016)**

Lived through the early years of LEO, Ralph Land recollects the bits and bytes of the history of LEO entering Eastern and Central Europe and identifies some factors that made the entry a success.

## **3 Conclusion**

We need to collect and preserve the IS field's rich history. The existing efforts and actions are not meant to be comprehensive or exclusive due to limited resources and time. I strongly encourage more people to become involved in the efforts to collect, preserve, write, interpret, and disseminate the IS field's history.

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