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2013 North American Leadership Council announcement!

We are happy to announce the newly elected members of the North American Regional Council and Council Chair: Rocki DeWitt (UVM)-Chair, Gabriel Chirita (HEC-Montreal), and Oregon State team member will be announced shortly. Congratulations!

We thank Jim Davis (Utah State) and Bill Worthington (Baylor) for their dedication as continuing members of the North American Leadership Council. We send our sincere gratitude and appreciation to the North American scholars that have served in these important leadership roles: Jim Davis as Chair, Bob Blunden, Matt Allen, Alex Dawson! We appreciate your diligent efforts and valuable input since the North American Region was launched in 2011.

Academic Meeting of the Americas

The 2013 STEP Academic Meeting of the Americas, was held on Thursday, 16 May in Viña del Mar, Chile in conjunction with FERC 2013. Twenty STEP members representing 15 enthusiastic teams from Argentina, Babson, Baylor, Brazil, Chile, Colombia, Dalhousie, Italy, Oregon State, Stetson, Sweden, UK, Venezuela and WPI participated in this truly global collaborative event! Seven teams presented their family business research cases, providing lively discussion amongst the group with a facilitator assigned to each case. Teams from Colombia and Venezuela concluded the event with a presentation discussing publishing STEP research and sharing their personal, rewarding experiences writing STEP Elgar book chapters. These highly valuable global research meetings have been well received and a worthwhile annual event. STEP members have proposed to continue this trend with 1-2 meetings each year.

Special thanks to our gracious colleagues at Universidad del Desarrollo for their warm welcome and support organizing this STEP event prior to FERC. We sincerely appreciate your hospitality and assistance coordinating this event!

We send our gratitude to our STEP colleagues on the ORGANIZING TEAM for this successful event: Matt Allen (Babson-USA), Juan Rivera (IAU-Puerto Rico), Aramis Rodriguez (IESA-Venezuela), Ma. Teresa Roscoe (FDC-Brazil), Pramodita Sharma (UVM/Babson-USA) and Bill Worthington (Baylor-USA).
Introducing: Our newest colleague from Russia!

We welcome Professor Teimuraz Vashakmadze leading the new STEP team from Russian Presidential Academy of National Economy and Public Administration (RANEPa), Institute of Business Studies-Moscow. At this leading business school in Russia, Prof. Vashakmadze is an Associate Professor in the Department of Business and Managerial strategy and one of the key finance professors, lecturing at IBS-M RANEPa since 2006. Professor Vashakmadze is the Master’s Degree Program Director at IBS – Moscow (RANEPa). He is also a visiting professor at Kyiv Mohyla Business School (leading business school in Ukraine) and at Cameron School of Business UNCW (USA).
**What is the STEP Global Summit all about?**

The Global STEP Summit is a celebration of eight years of the STEP project’s research and application to families. It will bring together STEP families and STEP academics from around the world for a one of a kind, live, learning event. The focus is on Transgenerational Entrepreneurship. STEP families are invited to participate in sharing their personal experiences and stories. It is an interactive learning opportunity with activities with productive sessions. Families will have Successful Transgenerational Entrepreneurship Practices take-aways to implement into their family business when they leave.

The Global Summit is designed to allow STEP families to receive immediate value from its findings and enable academics to better understand the needs of business families. The Summit is not a seminar; it is a unique learning dialogue between academics and an elite group of family members that brings the research to life.

During the Summits, families interact with other business families and a pool of expert academics. These scholars are closely related to family businesses through teaching, consultancy and personal experience. During the event, families also listen to findings, benchmark themselves against other families and apply new thinking to their particular situations. This unique setting allows families to discuss their own key issues for future research and develop innovative tools, methods and forms for managing their complex families and businesses. All families are able to leave with valuable knowledge and strategies to help them to develop further and archive transgenerational potential.

**What to expect - for families**

- Designed to directly affect family members active as managers and/or owners or future owners
- Prominent family members and multiple generations actively involved in family business-- encouraged to attend
- Tangible benefits from the experiences that occur, relationships created, and findings discussed
- Valuable interaction between academics from well-known universities and family members
- Passionate environment encourages learning and growth for families and their businesses
- Take away transgenerational entrepreneurship action plan
### NEW! STEP Country Spotlight ~ SPAIN

**Bienvenido a Barcelona, España!**

In our first STEP Country spotlight, we present **SPAIN**! Home of our gracious colleagues from ESADE in beautiful Barcelona and hosts of the 2nd **STEP Global Summit**!

14-16 November 2013

Meet the ESADE TEAM!
Alberto Gimeno
Maria Jose Parada
Eugenio Bieto
Jan Brinckmann

Alberto Gimeno and Maria Jose Parada are leading the charge planning the 2nd Global Summit! Don’t miss this spectacular experience for all STEP families and academics!

While in **Barcelona**, please make time to visit the many cultural events and attractions that make this city shine!

**Alberto and Maria Jose’s Top 5 Reasons why you will love Barcelona!**

1. **Beautiful city**: Architecture and Sightseeing
2. Vibrant cultural life
3. Delicious **Gastronomy**
4. Magnificent **Mild Weather**
5. **Lovely surroundings**: Beach and Mountains!

**Spain**, with its unique and long established culture, warm people, and magnificent setting, is a place you will not soon forget!
Series Editor: Pramodita Sharma,
University of Vermont & Babson College

Volume Editors: Philipp Sieger, University of St. Gallen, Switzerland; Robert Nason, Syracuse University, USA; Ana Cristina Gonzalez, ICESI, Colombia; K. Ramachandran, Indian School of Business, India

CHAPTER TITLES & AUTHORS
Introduction: Exploring transgenerational entrepreneurship: The role of intangible resources
Rob Nason, Ana Cristina Gonzalez and Pramodita Sharma

Family firms and entrepreneurial families as breeding grounds for virtues
Luz Elena Orozco C. & Gustavo González C. (Universidad de los Andes, Colombia)

Professionalization of the family business: Decision making domains
Alberto Gimeno & Maria José Parada (ESADE, Spain)

Transgenerational Entrepreneurship and Entrepreneurial Learning: A Case Study of the Associated Engineers Ltd. in Hong Kong
Jeremy C.Y. Cheng, Florence H.C. Ho, & Kevin Au (The Chinese University of Hong Kong)

Successful Family Business Ownership Transitions: Leveraging Tacit Knowledge
Rocki-Lee DeWitt & Ana Cristina Gonzalez (University of Vermont, USA; ICESI, Colombia)

The Role of Social Capital in Succession from Controlling Owners to Sibling Teams
Luis Cisneros, Mircea-Gabriel Chirita, and Bérangère Deschamps (HEC Montreal, Canada)

Opportunities and Dilemmas of Social capital: Insights from Uganda
Waswa Balunywa, Peter Rosa, Diana Nandagire Ntamu and Shakilah Nagujja (Makerere University Business School, Uganda; University of Edinburgh, Scotland)

Bridging for resilience: The role of family business’ social capital in coping with hostile environments
Aramis Rodriguez, Nunzia Auletta, Patricia Monteferrante (IESA-Venezuela)

Reputation for what? Different types of reputation and their effect on portfolio entrepreneurship activities
Eric Clinton, Robert S. Nason, Philipp Sieger (Dublin City University, Ireland; Syracuse University, USA; University of St. Gallen, Switzerland)

Conclusion: Exploring Transgenerational Entrepreneurship: Implications and Conclusions
Philipp Seiger, K. Ramachandran and Pramodita Sharma (University of St. Gallen, Switzerland; Indian School of Business, India; University of Vermont, USA)
**WHERE WE ARE:**
- Two Survey instruments, Constructs file and Survey Policies and Protocol approved by Board
- Vendor (Cornell) approved by Board
- STEP Survey FAQ – Handout
- Pre-test in progress! (2 affiliates from each region - Board Members)
- LAUNCH!  DATA COLLECTION  June – October 2013

**MANY THANKS** to all that have contributed to the development of the Survey over the years and for their diligent efforts to complete the survey!
- Survey sub-committee: Candy Brush, Kevin Au, Jim Davis, Gustavo Gonzalez, and Leif Melin
- 2013 Global Board members: Matt Allen, Kevin Au, Jim Davis, Julio DeCastro, Alfredo DeMassis, Alberto Gimeno, Frank Hoy, Gustavo Gonzalez, Leilanie Mohd Nor, Pat Monteferrante, Pramodita Sharma
- Previous Board members: Justin Craig, Allan Cohen, Ana Cristina Gonzalez, Maria Fonseca, Patricia Greene, Thomas Gura, Carole Howorth, Leif Melin, K. Ramachandran
- and so many more scholars that have contributed over the years (including Tom Lumpkin, Rob Nason, Mattias Nordqvist, Thomas Zellweger).

**FAQs - STEP Quantitative Survey**

*How many family businesses can participate in the survey?*
Each affiliated university must contribute a minimum of 20 completed surveys. We welcome more than 20 completed surveys as they will help strengthen this data set. The Global Board has approved STEP survey protocols to be followed for additional data collected and cost allocation.

*What is the process be followed for implementation of the survey?*
STEP 2013 survey is a two-part data collection process:
1. The contact person from each affiliated university will receive a link to the ‘affiliate survey’. This short survey allows the affiliate to nominate family businesses that meet the criteria mentioned above. PLEASE NOTE: Information on ALL contacted family businesses will have to be added to the data set even if they do not qualify for the survey;
2. The vendor will then directly send the respondent survey link to the listed contact of the qualifying family businesses. The affiliate contact will be able to view the number of surveys completed and can add more family business names to the list. This process will continue until at least 20 firms from an affiliate list have completed the survey.

*When should we expect the Survey to be launched and for how long will it be open?*
The survey will remain open for three months from the launch in order to accommodate vacation schedules and give affiliates more time to find respondents. Our goal is to have survey open for 3-month period between June and October.

*What is next?*
The vendor is currently conducting a pre-test with 2 family businesses from each member of the Global Board. Once the survey is finalized, we will notify teams when ready to launch.

*STEP SCHOLARS -- FOR MORE FAQs please log into the new STEP Google Share Drive or contact Val Duffy vduffy@babson.edu*
Step Scholar Spotlight and News:

Two STEP Scholars Featured in Family Business Wiki

Jeremy Cheng of the Chinese University of Hong Kong and William Worthington of Baylor University each wrote articles that were featured in the Family Business Wiki’s Newsletter.

Jeremy Cheng writes about venture philanthropy in Chinese family firms and how venture philanthropy can be used as a tool to facilitate communication amongst family members for a shared goal. To read his article click here.

Dr. Worthington’s article ‘When you lower the boom of ‘faith’ into the Venn of firm and family, how significant is the influence?’ discusses the influence of faith in family firms, the way they function and their success. To read more click here.

Family Firm Institute: The Practitioner

Greg McCann, Stetson University

STEP Scholar Greg McCann, a professor of family enterprise from the one of the newest members, Stetson University, just published a blog in the Family Firm Institute “Practitioner”. In Prof. McCann’s article, he discusses how Universities can be used as a resource for family firm owners. He describes how Universities are preparing their students with a greater competency in family business as a part of their business education. Click here to read his full blog “Universities: A resource for you and your clients”

Tech Innovation in the Family Context:

Alfredo De Massis, University of Bergamo

STEP Scholar Alfredo De Massis of the University of Bergamo published a blog post on the Management INK site. His blog is about ‘Technological Innovation in Family Firms’, from his leading article published in Family Business Review’s March 2013 issue.

“My interest in this topic stemmed from the fact that what technological innovation management handbooks propose as universally applicable good practices cannot always be applied to family firms. In the past I have worked for many years as a management consultant for several family firms, and now I am used to having close and frequent interactions with many Italian family firms that are enrolled at the Center for Young & Family Enterprise (CYFE) of the University of Bergamo that I am co-directing. Throughout all this experience in innovation management projects, I was very surprised to see how often traditional ingredients for success in technological innovation did not work in the specific context of family firms.” You can click here to read more of his interesting blog!
Upcoming Events:

**STEP Related Events**
- 2013 STEP Global Summit 14 – 16 November 2013 EDAE, Barcelona, Spain

**Conferences and Programs of Interest**
- SMS International Conference 28 Sept. – 1 Oct. 2013 Atlanta, Georgia (US)
- IFERA 2 – 5 July 2013 St. Gallen, Switzerland
- AOM Conference: Capitalism in Question: 9 – 13 August 2013 Orlando, Florida, USA
- FFI Global Conference 16 – 19 October 2013 San Diego, California, USA
- Diana International Research Conference 15 - 17 June 2014 Stockholm, Sweden

**Family Firm Institute Global Conference**

San Diego, California
16-19 October 2013

*Register online [here](#)!*

**Speakers Include**
STEP Scholars:
Frank Hoy
Annie Koh
Tom Lumpkin
Leif Melin
Ilse Matser
Mattias Nvordqvist
Pramodita Sharma

**Check out the 2014 FECC event!**

Global Family Enterprise Case Competition - UVM

Twenty-one teams are now confirmed for the 2014 **Family Enterprise Case Competition** at UVM on **8 - 11 January 2014**! Click [here](#) for complete list of teams! Registration is officially closed – however we have a wait-list—click [here](#) for details!

**JUDGING OPPORTUNITY:** Would you like to serve on a judging panel for FECC 2014? An incredible experience is guaranteed as you will be viewing some of the best family business students from 21 fine institutions showcasing their talents as they think through and present solutions to the dilemmas in the cases. If interested, please send contact Dann Van Vliet at [daniel.vdv@uvm.edu](mailto:daniel.vdv@uvm.edu).

**CASE WRITING COMPETITION:** Cases used in FECC are brand new and generated via a case writing competition. Submissions are now being accepted until **1 September 2013**. Click [here](#) for more details on the Call.
FERC 2013 Highlights

The 9th Family Enterprise Research Conference: Closing the gap between emerging and developed economies was held on 17-19 May 2013 in Chile at the beautiful coastal city of Viña del Mar. From all over the world, scholars interested in creating and disseminating knowledge on family enterprise, which remains the most common and often less studied type of organization, attended the conference. Please check out the FERC link to find copies of some of the presentations from the conference. This year there were 9 awards given for the most outstanding works in the conference. We are delighted to announce that STEP affiliate members received 6 of these awards! Congratulations to the following FERC AWARD winners from our STEP community!

Manisha Singal – Virginia Tech University/Dalhousie
Luz Elena Orozco Collazos – UniAndes - Colombia
Gustavo Gonzalez Couture - UniAndes - Colombia

Luis Diaz Matajira - Universidad de los Andes – Colombia
Matt Allen - Babson College – USA (2)

LOOKING AHEAD to FERC 2014

We are proud to announce:  
STEP Affiliate Oregon State University  
as host for the 10 year anniversary of FERC in 2014!

The 2014 Family Enterprise Research Conference will be held June 6-8 in Portland, Oregon, USA at the Nines Hotel. This 10th anniversary event will be hosted by STEP Affiliate, Oregon State University, site of the first FERC conference in 2005. The conference co-hosts will be Don Neubaum, Sherri Noxel, Kim Eddleston and Alex Stewart. We look forward to this spectacular event in the “City of Roses”!

STEP Teams—Mark your calendars! As in previous years, the Oregon State University team will be hosting a STEP Academic meeting on 5 June 2014 prior to the FERC event! More details will follow!
**Publishing Opportunities**

- **European Journal of International Management (EJIM):** [European Family Business Research: Current Debates and Future Challenges](#) Deadline: 1 July 2013
- **Entrepreneurial Exit 2013 Conference:** [The Research Handbook of Entrepreneurial Exit, Edward Elgar Publishing and International Small Business Journal Special Issue on Entrepreneurial Exit](#) Deadline: 1 July 2013
- **International Family Enterprise Research Academy** – 2013 Annual Conference: [Ownership, Governance and Value in Family Firms](#) Deadline: 2 July 2013
- **Hamburg Institute of Family Business – Call for Abstracts:** [3rd International Academic Symposium](#) Deadline: 6 July 2013
- **Corporate Governance: An International Review (CGIR):** [Special Issue on Cross-National Perspectives on Ownership and Governance in Family Firms](#) Deadline: 1 September 2013
- **2nd Annual Family Enterprise Case Competition (FECC):** [Call for Original Family Enterprise Case Studies](#) Deadline: 1 September 2013

**Job Opportunity in Sweden**

Jönköping International Business School (JIBS) invites applications from candidates with research and teaching interests in Entrepreneurship and/or Strategy. JIBS is one of four schools within Jönköping University and it is highly ranked worldwide in the areas of Entrepreneurship and Family Business research. The School is recognized as the most international business school in Sweden and one of the most international in the world. It has about 150 employees and 2100 students. Our mission is to advance the theory and practice of sustainable value creation in private and public organizations, with emphasis on Entrepreneurship, Ownership, and Renewal. Please submit a letter of interest, your CV including a list of publications and teaching experience, a copy of maximum 10 representative publications, teaching evaluations, and the name and contact details of three references, to registrator.ihh@jibs.hj.se. All material shall be submitted digitally. Applications received by **August 15, 2013** will be given priority. **Click here** to read more about how to apply.

**3 NEW STEP Cases!**

**University of Western Cape, South Africa**

We welcome two new cases from UWC (collaborating with STEP affiliate Jönköping International Business School, Sweden)!

The UWC scholars’ first case is about agricultural innovation with a family business in the wine industry within local and international context.

The second case by UWC, explores a successful 5th generation family business beginning as an agricultural farm that evolves into a vineyard.

**Universidad de los Andes, Bogotá, Colombia**

STEP scholars from UniAndes have submitted a case about a second generation, family managed institution in the financial industry.

**REMINDER! ANNUAL STEP CASES ARE DUE**
**JUNE 30th, 2013** ~ Please be sure to mark your calendars for this very important due date!
Students who have experience with case analyses and case competitions are intrigued by case writing. Yet, it can be foolhardy to send them off on their own. They may have an ability to conduct library research and interviews. But, knowing how to tease out focal decisions takes practice, especially when interpersonal relations are an important element.

Writing a STEP case with faculty direction can be a great mechanism to provide students experience in identifying focal issues and case writing. First, data collection and case writing is supported by underlying literature and easy to digest concepts. Pre-reading a classic family business text and the theoretical and empirical papers pertaining to entrepreneurial orientation is rather straightforward. Students can match the reading content to the suggested questions to learn how concepts get mapped on to interviews. Second, the existence of a semi-structured interview format and a willing faculty instructor who has experience doing at least one STEP case, means that students do not need to develop an interview structure. They can listen to previous interviews and read the transcripts to anticipate the experience of conducting interviews. Third, the faculty member can practice interviewing techniques with students to build skills in developing a rapport with the interviewee, practicing using the digital recorder, and experiencing what it feels like to be put on the spot with an uncomfortable question. Finally, a company’s willingness to be the subject of a case study may be enhanced by student participation. Some business leaders are more interested in enhancing student learning than in assisting a faculty member’s research program. The solid structure for non-disclosure and confidentiality supports the subject’s confidence in the safety of sharing information and provides students with experience of what it means to be accountable for confidentiality.

Obviously, the faculty leader still needs to play an active role. First, ascertain the students’ character. What evidence or experience do you have to know students respect confidentiality? Second, evaluate the students’ and your own discipline for persisting in time-consuming tasks. Transcribing tapes is a valuable learning experience for picking up on the nuances of interviews. You have likely missed these when you are focused on asking questions. Although rank may have its privileges, sharing the burden of transcription will go a long way to convey that no matter how accomplished you may get there will be times when there are insights that are gleaned from rolling up your sleeves. Third, have students familiarize themselves with the industry the company competes in before doing the interviews. Ask the company to provide a tour of the facility before doing the interviews. Help the students to develop a sense of what the business is about. Fourth, test the students’ intellectual readiness for asking a series of questions that build off the students’ knowledge. This can be done through in class experience with case analysis as well as observations of students’ work as members of case competition teams. But, you will also want to practice interviewing before you get on the ground. Using a Socratic approach of asking, “What question would you open with? What are you trying to do with that question? What if they respond in this way? What will you ask next?” helps the student develop mindfulness and confidence before they actually interview. Finally, get a sense of the emotional energy present in the company before putting students in the role. Avoid inserting them into situations where drama is rampant when they have yet to develop the knowledge, skills and abilities required to navigate heart ache. If my experience is any indicator, this can be a highly rewarding experience for faculty member and student alike.
Case Research Journal Special Issue-Family Business

UPDATE: The Co-Editors of the Case Research Journal Special Issue on Family Business include STEP scholars Pramodita Sharma, UVM & Babson College, USA, Robert Blunden, Dalhousie University, Canada, Juan. O Riviera Algarin, Inter-American University of Puerto Rico, Justin Craig, Northeastern University, USA, and Thomas Zellweger, University of St. Gallen, Switzerland. The team of editors has reviewed over 40 submissions in response to this essential Call for cases. Over the last 6 months, the co-editors have accepted 5 cases for the Special Issue, invited 12 submissions with revisions, and 10 are still in the running with another 5 being processed. The co-editors expect to have 8-10 cases including an Introductory Article in the final Special Issue on Family Business.

This extraordinary, first of its kind, Family Business Special Issue in the Case Research Journal is expected to be published in early 2014. We will continue to keep you updated on the progress!

Looking for a Good Read?

New from Elgar Publishing: 
**Handbook of Research on Family Business, Second Edition**

During the previous decade, the multi-disciplinary field of family business has advanced significantly in terms of advances in theory, development of sophisticated empirical instruments, systematic measurement of family business activity, use of alternative research methodologies and deployment of robust tools of analysis. This second edition of the Handbook of Research on Family Business presents important research and conceptual developments across a broad range of topics. The contributors – notable researchers in the field – explore the frontiers of knowledge in family business entrepreneurship and stimulate critical thinking, enriching the repository of theoretical frameworks and methodologies.

Notable Editorials in the Family Business Review
Check out these recent articles from our family business colleagues!


For more of the latest research published in *FBR* go to: http://online.sagepub.com/cgi/alerts