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Volume 6, Issue 2

The STEP Project is now in its 10th year of research studying transgenerational entrepreneurship of family enterprise! Take a look at *STEP IMPACT by the Numbers!*

1st Quantitative Longitudinal Study Launched in 13 languages!
105 research cases from 4 regions of the world in Qualitative Research Study
4 Edward Elgar Regional STEP Series books (Call for 5th book announced!)
13 scholarly articles published
7 Observation and Practitioner Booklets (includes NEW Practitioners GLOBAL Booklet Vol. II due this summer)
7 dissertations with STEP data successfully defended
17 Issues of the Quarterly Newsletter *STEPout*
1st North American Case Research Journal, Special Issue on Family Businesses co-edited by STEP scholars
16 Global and Regional Summits convened in 4 regions of the world
24 STEP Global Board meetings (since its creation in 2010).
38 Academic Meetings held within the 4 regions
13+ informal STEP scholar meetings

**STEP Governance Topics**

**List of Accomplishments**

- Annual call for membership for new STEP teams
- Three year Board Member Term/rotations
- 3 Elected positions on Board: Board Chair, Vice Chair and Chair Emeritus
- Call for Nominations for Academic Director – Now accepting nominations for Academic position (start date Jan. 1st) — contact mallen4@babson.edu for more information. Selection committee: Matt Allen- Chair, Hsi-Mei Chung, Alberto Gimeno, Gustavo Gonzalez, and Tom Schwartz.
- Board approved job descriptions for Board Chair, Council Chair and Academic Director. For details of job descriptions click here.

Contact: step@babson.edu

For more information about these announcements- Please contact Val Duffy, STEP Manager, vduffy@babson.edu
Welcome New STEP Affiliate ~ Peru

Following up with last newsletter’s introduction of STEP’s new Affiliate in Peru...
We introduce the University de Piura, Peru, team leaders!

**Pablo Dominguez Estrada** is the STEP Team Leader at UdeP and a professor of business policy. He is a Ph.D Candidate at University of Navarra and received two master degrees from the Institute of Higher Business Studies (IESE) at University of Navarra and the ESAN Graduate School of Business. His research focuses on issues of family business, entrepreneurship and innovation. He has held various management positions in companies such as Centromin Perú, Phillips Peruana S.A., and Compañía Peruana de Teléfonos.

**Alvaro Tresierra Tanaka** is a professor of finance and did Ph.D and masters studies in Economics, Management and Business and Finance, respectively, at Universidad Complutense in Madrid. He also did masters and undergraduate studies at Universidad de Piura in Business Administration and Mechanical-Electrical Engineering. His research focuses on investment decisions within companies, business financing, and capital risk.

**Dr. Sergio Balarezo Saldana**, President of UdeP, received his Ph.D in Industrial Engineering from Universidad de Navarra in Spain and before that studied at Universidad de Piura. His research interests include supply chain management and the analysis and optimization of processes.

We are pleased to present 11 distinguished scholars and researchers to join the University de Piura STEP team

Cinthya Consiglieri Alvarado
Stefano De Laura Czichowsky
César Augusto Martín- Cáceres Dagnino
Verónica Arriagada Elzo
Maria Ignacia Jiménez
Brenda Liz Silupa Garces
Diego Alonso Iturry Odria
Elsa Mercedes Alama Salazar
Gonzalo Jiménez Seminario
Anahi Alburqueque Vasquez
Ricardo Santos-Yont
Greetings to our new Affiliate from France!

Founded in 1872, EM LYON Business School is one of the oldest business schools in Europe. The action of EM LYON Business School has focused on entrepreneurship, innovation and humanism. These major themes guide their actions, beliefs and values, and combine into a powerful force that each of us has within: The Power of Start.

Educating Entrepreneurs for the World is at the heart of everything we do at EMLYON.

_Educating_ - life-long learning is our core commitment; _entrepreneurs_ - we believe the world needs entrepreneurs capable of creating new wealth and value; _for_ - our vision is of leaders who know how to distribute fairly the value they have created; and _the World_ - because succeeding in business today requires experience in the wide range of cultural and economic systems across the world.

Alain Fayolle: (STEP Team leader)
Co-Director of the Research Center (EM Lyon); current research work focusing on the dynamics of entrepreneurship processes, the influences of cultural factors on organizations’ entrepreneurial orientation of entrepreneurship education.

Kathleen Randerson (STEP Team Administrator)  
Professor of Entrepreneurship at the Université Grenoble-Alpes (France) and the University of Bergamo (Italy); Associate researcher at EM Lyon since 2008. Relevant research interests: Family entrepreneurship and corporate entrepreneurship.

Myriam Lyagoubi
Assoc. Professor of Finance; Relevant research interests: Family Business and corporate governance and ownership.

Lionel Camblanne
Consultant, associate to the EM Lyon research center. Relevant research interests include family business decision making; entrepreneurial processes; family business strategy.

Celina Smith  
Assistant professor of entrepreneurship at EM Lyon. Relevant research interests: Family business behavior and Network theory.

Philippe Silberzahn  
Associate professor of entrepreneurship and strategy at EM Lyon. Relevant research interests: Innovation; Entrepreneurial processes; Effectuation.
The 3rd annual STEP Global Academic Meeting in conjunction with FERC, was held on Thursday, 5 June 2014 at Portland, Oregon, USA. STEP affiliate Oregon State University (OSU) graciously hosted and organized a fantastic meeting for STEP scholars. OSU also arranged for magnificent sunny weather during our visit! Twenty scholars from 14 universities worldwide participated in the global, collaborative event. Countries represented at the meeting were: Brazil, Canada, Chile, Colombia, France, Ireland, Peru, Puerto Rico, United Kingdom and United States.

Pramodita Sharma, STEP Global Director, kicked off the meeting presenting STEP Global updates. Highlights included what's ahead for STEP and the STEP quantitative survey progress. Pramodita, stepping down as Global Director on 31 December 2014, announced a Call for Nominations for Academic Director is currently open (send inquiries to Matt Allen mallen6@babson.edu).

Pramodita reported that we are moving along as planned with the STEP data collection for the Quantitative Survey. The final closing date for all quantitative survey data collection is 31 December 2014.

We were fortunate to hear intriguing presentations from four STEP teams about their current work on their STEP research cases. A welcomed newcomer to the STEP Project, Pablo Dominguez, UDEP, Peru, had an interesting presentation about Family Businesses in Peru and Challenges for Continuity. We look forward to the UDEP team’s first STEP research case!

Three more STEP cases were presented including: Lancaster’s case of a ninth generation family business in the Hotel sector; a third generation wholesaler/retailer of Nursery (plants) from Babson and a sausage manufacturer family business case from Stetson. Each discussant assigned to the presentations led stimulating and lively conversation with the group! We wrapped up the meeting with observations of the topics discussed. (Please see side bar.)

After the STEP Academic meeting, we made our way to a fantastic Peruvian Restaurant in Portland called Andina Restaurant. This warm, welcoming and very lively restaurant is family business owned. The family works closely Sherri Noxel at the Austin Family Business Program at OSU. The matriarch of the family warmly greeted us and explained how their family restaurant started, as well as the love story and fate that brought it to fruition!

We send our gratitude to Oregon State STEP members: Sherri Noxel and Don Neubaum for hosting this successful event!

Keep in mind for 2015! We plan to continue this global collaborative academic meeting next year on 4 JUNE 2015 prior to FERC at the University of Vermont! More details to follow!
STEP Affiliate News and Spotlight

**Babson College Announces**

The Bertarelli Foundation Distinguished Professor of Family Entrepreneurship

Babson College, building on its storied history of educating family entrepreneurs and advancing the study of family entrepreneurship, announced the **Bertarelli Foundation Chair** at the 2014 Babson College Entrepreneurship Research Conference (BCERC). The Bertarelli Foundation Chair will lead a multidisciplinary approach to family enterprise, where the family, not the business, is the focus.

Thanks to the generous donation from the Bertarelli Family, Babson is currently recruiting for the Bertarelli Foundation Distinguished Professor of Family Entrepreneurship. For more information about this faculty position, please click [here](https://babson.peopleadmin.com/postings/search) for the job description or kindly visit the Babson HR website link below to review. Interested candidates must submit their application by **October 1, 2014** online to the Babson HR website at: [https://babson.peopleadmin.com/postings/search](https://babson.peopleadmin.com/postings/search).

In recognition of **Ernesto Bertarelli**, a 1989 graduate of Babson and his family’s track record in fostering entrepreneurship, a new research prize was announced in their name at BCERC. The Bertarelli Prize will award $2,500 to the best family entrepreneurship paper recently presented at the 2014 BCERC.

**Oregon State University Hosts 10th Anniversary of FERC 2014!**

The 10th Anniversary of the Family Enterprise Research Conference (FERC) was held **6-8 June 2014**. The event attracted approximately 90 scholars from 60 Universities worldwide! The annual conference was hosted by STEP affiliate Oregon State University in beautiful downtown Portland, Oregon. We congratulate The Co-Hosts (Sherri Noxel, OSU, Don Neubaum, OSU, Kimberly Eddleston, Northeastern and Alex Stewart, Marquette Univ.) on their successful event! The FERC Award winners will be announced in the next issue of **STEPout**!
Dr. Leilanie Mohd Nor has successfully defended her dissertation titled: *An Investigation into the Decision Making Process in Venture Creation: A Comparison between Family Business and Non-Family Business* on 28 February 2014 at joint program at the Universiti Tun Abdul Razak Malaysia and Toulouse Business School, France. Dr. Mohd Nor used STEP qualitative data for her dissertation research.

Congratulations to STEP member Thomas Gura for successfully defending his dissertation titled: *Software Development Project Rejection: A Quantitative Q-factor Analysis to Measure Medical Doctors and Software Cognitive Learning Styles of Programmers*. Dr. Gura successfully defended his dissertation on 3 March 2014 at Capella University.

**GUESSS (Global University Entrepreneurial Spirit Students’ Survey) Report Released**

Philipp Sieger (St. Gallen) is Project Manager for international research project GUESSS, investigating students’ career choice intentions on a global level. GUESSS Board members include Prof. Dr. Urs Fueglistaller (Chairman), Prof. Dr. Thomas Zellweger, Prof. Dr. Frank Halter and Prof. Norris Krueger.

The main research focus is career choice intentions of students in general, and their entrepreneurial intentions in particular. Several influencing factors are investigated, such as University context, family context, motives, and attitudes. Moreover, the study is especially interested in students with family business background, who have the opportunity to take over their parents’ business.

Between October 2013 and March 2014 the sixth data collection wave since 2003 took place. In total, 34 countries took part and more than 1.9 million students from 759 universities were contacted. The final dataset includes more than 109,000 completed answers. A main finding of the latest GUESSS edition is that entrepreneurial intentions of students have been decreasing in many countries compared to 2011. Please download the international GUESSS report to learn more about these findings.

Among some of the 60 academics that participated in this research were STEP affiliates including: EM Lyon, ESADE, University of Bergamo, University of St. Gallen and UVM.
The Tecnologico de Monterrey (Tec) is a private University and leader in the field of education for entrepreneurship in the 21st Century with continuous innovation in educational pedagogy and learning technologies. Our purpose for more than seven decades has been to contribute to the economic and social development in Latin America where more than 90% companies are family-owned, and many are small and medium size firms. We recognize the need for knowledge sharing, development of learning communities and most of all, places where we can increase both our understanding of family business and foster their development.

In 2010, the Tec signed a strategic agreement with the Business Family Foundation; a Canadian organization with a clear vision of helping business families to succeed through multiple generations, recognizing the importance of the legacy as well as integrity. As a result we are able to offer training and consultancy programs to more than 100 small and medium enterprises in Mexico. In 2011, the Instituto del Emprendimiento Eugenio Garza La Güera was founded as an important initiative for the Tec to formalize the program and to generate a bigger impact. Today, more than 20 of these Centers for Entrepreneurial Families are part of an important network to which the Tec has contributed to the body of knowledge about family business in Mexico.

This is not the first time that the Tec has led in the field of entrepreneurship and family business. Since we joined the STEP Project in 2006, we have been working with business families, growing an international network of researchers and experts worldwide, and bringing families together to learn from one and other. There is a significant opportunity today for the Tec to consolidate its role as it was recently honored with a national award of entrepreneurship (Premio Nacional del Emprendedor) by the Mexican President, Enrique Peña Nieto. The pathway to success is not an easy one but the journey for entrepreneurial families is a rewarding one.

Enrique Peña Nieto (President of México) and Salvador Alva (President of the Tecnologico de Monterrey), May 2014.

Tecnologico de Monterrey receiving the award (Premio Nacional del Emprendedor).
Waseda Business School is a nimble, innovative, 21st century business school headquartered in Tokyo, active throughout Asia, and fully engaged in the World. With over 30 full time faculty members and 400 students, our goal is to create value by preparing the next generation of leaders who, with a global mindset, know the latest management theories, frameworks and concepts; become, through their decisions and their actions, mature, confident and authentic professionals with a long-term perspective; and engage in the deliberate practice of management for the good of their organizations and society.

As Japan’s leading business school, WBS is both uniquely Japanese and highly international. We draw students, ideas and challenges from around the world and, together, through our teaching and learning, our research, and our consulting, we discover new knowledge that can be shared and applied globally.
NEW STEP Cases

Latin American STEP affiliate, Universidad de los Andes School of Management, Colombia, recently submitted 2 cases to the qualitative database! The first case is a 2nd generation family business which produces batteries. Their second submission is also a 2nd generation family specializing in selling home and kitchen products.

STEP Affiliate University of Edinburgh, Scotland, recently added three cases to the STEP database. The 1st case involved a 4th generation family business in the home building industry. The next two cases were submitted by Edinburgh collaborative partner for STEP--Makerere University Business School in Uganda. These cases involved a 3rd generation family business in the human and public health industry, and a 2nd generation furniture and window treatment family business.

And the latest new case came from Jonkoping International Business School, Sweden. This case was a 2nd generation family business with multiple interests in the automobile, steel wire, and real estate industries.

Opportunities for Publishing and more...

- Academy of Management Learning & Education: Call for Papers – 2015 Special Issue, Learning Patterns and Approaches to Family-Business Education Around the World. Deadline for initial submissions: 15 July 2014
- University of Vermont School of Business Administration: Call for Cases – 3rd Annual Family Enterprise Case Competition. Deadline: 15 September 2014
- Entrepreneurship Theory and Practice: Call for Papers – January 2016 Special Issue: Careers, Organizations and Entrepreneurship. Deadline: 1 October 2014
- Strategic Entrepreneurship Journal: Call for Papers – Special Issue: Enduring Entrepreneurship. Submissions accepted: 1 November 2014 – 15 January 2015

STEP Scholars -- Call for 5th STEP BOOK!
Call for Submissions for the Edward Elgar Publishing STEP GLOBAL Book Series - VOLUME II: Developing Next Generation Leaders for Transgenerational Entrepreneurial Family Enterprises. This is a fantastic opportunity to share your research in Family Business from your region! Chapter Proposal Due: 1st July 2014
PLEASE SEND SUBMISSIONS TO STEP@babson.edu.
Exploring Family Entrepreneurship!

Academy of Management Annual Meeting

Family Entrepreneurship Professional Development Workshop (PDW)

Aug 2, 2014 from 10:45AM - 1:15PM

Please join STEP team members: Kathleen Randerson (Chair and speaker) U. de Grenoble ELab Research Center; Frank Hoy (Speaker) Worcester Polytechnic Institute; Pramodita Sharma (Speaker) U. of Vermont; and Leif Melin and Francesco Chirico (Discussants), Jonkoping International Business School for this PDW at the Academy of Management Annual Meetings!

While entrepreneurship, family, and family business have been studied as relatively separate domains with their own dedicated research conferences and academic journals, we attempt to build research on their intersection: family entrepreneurship.

Taking the firm as main level of analysis has left unexplored important questions such as informal family contributions or network (Anderson et al, 2005), family entrepreneurial orientation as potential antecedent to transgenerational value creation (Zellweger, Nason and Nordqvist, 2012), or involvement in the board of directors (Sciascia, Mazzola, Astrachan, Pieper, 2013). Research has been done at the intersection of family business and strategic entrepreneurship (Lumpkin, Brigham & Moss, 2010) but not at the intersection of family, family business and entrepreneurship (Fayolle & Begin, 2009, Hoy & Sharma, 2010; Uhlaner, Kellermanns, Eddleston & Hoy, 2010). A first PDW, aiming at opening this field of research, attracted more than 50 participants last year. The goals of the current PDW are to begin exploring this new field of research, facilitate discussion among entrepreneurship and family business scholars, formalize discussion in Family Entrepreneurship, push research forward and gain insights from cutting edge scholars, providing a point of reference for coalescing research questions and findings surrounding this important question.

FFI POST-CONFERENCE -- RESEARCH & EDUCATION SYMPOSIUM:

STEP Project — Constituencies and Constellations from an ongoing research project

Saturday, October 11, 2014 at 9:00 AM
Washington D.C.

Today, there are 42 institutions and 200 scholars from around the world engaged in the STEP project. Based on in-depth case studies and survey research of over a thousand trans-generationally successful families around the world, the scope of this project is unprecedented. The latest results will be shared by panelists from STEP partner institutions. The rare insights on factors that enable the growth and longevity of family enterprises are discussed in this panel — making it a MUST ATTEND for all — academics and advisors!

STEP Member Panel: Matthew Allen, Babson College, Eric Clinton, Dublin City University (Ireland), Mattias Nordqvist, Jönköping International Business School (Sweden), Carlo Salvato, Universita Bocconi (Italy); moderator: Justin Craig, Northeastern University
Global Family Enterprise Case Competition (FECC) Opportunities

The 2015 Family Enterprise Case Competition (FECC 2015) is fully subscribed! Twenty-four teams from 13 countries will be with in Burlington, VT from January 7-10, 2015 to compete in this globally unique competition. But there are more opportunities to participate!

CASE WRITING COMPETITION -
CALL FOR CASES: [http://www.uvm.edu/business/fecc_images/2015_FECC_callforcases.pdf](http://www.uvm.edu/business/fecc_images/2015_FECC_callforcases.pdf)
Due date: 15 September 2014
Each selected case will receive $1500 USD

SERVE AS A JUDGE:
FOR FB EDUCATORS - If you have never served as a judge in this competition and are interested in doing so, kindly send a note to Pramodita Sharma (psharma@bsad.uvm.edu). We will be sure to accommodate you. It’s well worth an experience!
If you have already served as a judge, we welcome you to field a team. Interested in serving as a judge again – let me know and we will place you on the waiting list for judges.

TEAM REGISTRATIONS –
Any team that registers from now on will go into the waiting list for 2015 and will have priority for 2016.
Why is the UVM Family Enterprise Case Competition quickly becoming one of best case competitions in the world? The competing coaches, students, judges & sponsors share their perspective in this 5:57 minute video clip: [http://www.uvm.edu/business/?Page=fecc/fecc.html&SM=familybusiness_submenu.html](http://www.uvm.edu/business/?Page=fecc/fecc.html&SM=familybusiness_submenu.html)

Job Opportunities

Babson College, Wellesley Mass.
- Babson is currently recruiting for the Bertarelli Foundation Distinguished Professor of Family Entrepreneurship. Please click [here](http://www.babson.edu) for the job description or kindly visit the Babson HR website link below to review.
- Also-applications are invited for two tenure-track positions in the Entrepreneurship Division, one with research specialization in entrepreneurship research and a second in technology entrepreneurship beginning September 1, 2015. The deadline for all applications is October 1, 2014. Interested candidates for all positions should apply through [https://babson.peopleadmin.com/postings/search](https://babson.peopleadmin.com/postings/search).

University of St. Gallen, Switzerland
- The Center for Family Business at the University of St. Gallen wishes to appoint one Post Doc/Assistant Professor in Entrepreneurship, with special focus on family business. Closing date is September 15, 2014. For further details about this position click [here](http://www.unisg.ch) or contact Prof. Dr. Thomas Zellweger, Chair of Family Business, University of St. Gallen at thomas.zellweger@unisg.ch.

University of Manitoba, I.H. Asper School of Business, Winnipeg
Applications are invited for a tenure-track position in Entrepreneurship/Innovation in the I. H. Asper School of Business at the University of Manitoba. The appointment will be at the rank of Assistant Professor. The appointment start date is July 1, 2015. Please send inquiries to: Zhenyu Wu, Ph.D. [zhenyu_wu@umanitoba.ca](mailto:zhenyu_wu@umanitoba.ca)

“It was a great experience in Vermont, and the organization was just superb. Easily one of the most professional events I’ve been to among the 200+ events I have attended in the academic arena”
Mattias Nordqvist, Coach, Jönköping International Business School, Sweden
Looking for a Good Read?

**Publishing Qualitative Research**  
Trish Reay (University of Alberta)  
Family Business Review June 2014; first published on April 2, 2014

**Firm Philanthropy in Small-and-Medium-Sized Family Firms: The Effects of Family Involvement in Ownership and Management.**  
Giovanna Campopiano (Witten/Herdecke University), Alfredo De Massis (Lancaster University Management School), and Francesco Chirico (JIBS).  
Family Business Review – Published online before print June 8, 2014

**Family Social Capital, Trust within the TMT, and the Establishment of Corporate Goals Related to Nonfamily Stakeholders**  
M. Katiuska Cabrera-Suárez, M. Cruz Déniz-Déniz, Josefa D. Martín-Santana (Universidad de Las Palmas de Gran Canaria)  
Family Business Review – Published online before print March 20, 2014

**Toward the Cluster Model: The Family Firm's Entrepreneurial Behavior Over Generations**  
Nava Michael-Tsabari (Technion – Israel Institute of Technology), Rania Labaki (University of Bordeaux and INSEEC Business School), Ramona Kay Zachary (Baruch College, The City University of New York)  
Family Business Review – Published online before print March 11, 2014

**Sage Handbook of Family Business now available as eBook!**  
Editors: Leif Melin, Mattias Nordqvist, Pramodita Sharma

The book features many **STEP scholars** as editors and authors and has received wonderful reviews.

*In this work some of the foremost research leaders in the field of Family Business have attracted and compiled manuscripts from a very strong set of contributing researchers. It provides a comprehensive, insightful and current overview of the field from theoretical, methodological and empirical vantage points as well as discussions of critical issues and ways forward.*

- Per Davidsson, Director & Talbot Family Foundation Chair in Entrepreneurship, Australian Centre for Entrepreneurship Research

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