

Lloyd P. Steier, PhD

Distinguished Chair, Entrepreneurship & Family Enterprise
Professor, Strategic Management & Organization
Academic Director, Centre for Entrepreneurship and Family Enterprise
Academic Director, Alberta Business Family Institute

UNIVERSITY OF ALBERTA SCHOOL OF BUSINESS

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Edmonton, AB T6G 2R6 Canada

Academic Career

2012-2017	Vice Dean, Alberta School of Business
2004-Present	Distinguished Chair in Entrepreneurship & Family Enterprise
2003-Present	Professor, Strategic Management and Organization, School of Business
2003-Present	Academic Director, Alberta Business Family Institute
2000-Present	Academic Director, Centre for Entrepreneurship and Family Enterprise
1998-2003	Associate Professor, SMORG, U of A
1991-1997	Assistant Professor, SMORG, U of A
1986-1990	Visiting Professor (Term Appointment, Course Prof & Manager BUS, U of A)

Education

Rotman School of Management/University of Alberta School of Business:
2015, Institute of Corporate Directors (ICD)

Family Firm Institute
2014, Certificate in Family Business Advising

University of Washington, Seattle:
1992, Visiting Scholar, School of Business Administration

University of Alberta, Edmonton:
1985, PhD, Educational Administration (Organizational Theory, Policy)

University of Saskatchewan, Saskatoon:
1978, MEd, (Curriculum Studies)
1976, BEd, (English and History)
1974, Advanced Certificate in Arts (English)
1973, BA, (English and Psychology)

Refereed Publications

- 2001-18** Miller, D., Steier, L., & Le Breton-Miller, I. (2016). What can scholars of entrepreneurship learn from sound family business? *Entrepreneurship Theory and Practice*, 40, 445-455.
- Steier, L., & Miller, D. 2010. Pre- and post-succession governance philosophies in entrepreneurial family firms. *Journal of Family Business Strategy*. 1/3:145-154.
- Steier, L. 2009. Where Do New Firms Come From? Households, Family Capital, Ethnicity, and the Welfare Mix. *Family Business Review*. 22/3: 273-278.
- Steier, L. 2009. Familial Capitalism in Global Institutional Contexts: Implications for Corporate Governance and Entrepreneurship in East Asia. *Asia Pacific Journal of Management*. 26/3: 513-535.
- Heck, Ramona K. Z.; Hoy, Frank; Poutziouris, Panikkos Z.; Steier, Lloyd. 2008. Emerging Paths of Family Entrepreneurship Research. *Journal of Small Business Management*. 46/3: 317-330.
- Steier, L. 2007. New venture creation and organization: A familial sub-narrative. *Journal of Business Research*. 60: 1099-1107.
- Chua, J., Steier, L., & Chrisman, J. 2006. How family firms solve intra-family agency problems using interlocking directorates: A comment. *Entrepreneurship Theory and Practice*. 30/6: 777-783.

- Steier, L., & Ward, J. 2006. If theories of family enterprise really do matter so does change in management education. *Entrepreneurship Theory and Practice*, 30/6: 887-895.
- Le Breton-Miller, I., Miller, D., & Steier, L. 2004. Towards an integrative model of effective FOB succession. *Entrepreneurship Theory and Practice*, 28/4, 305-328.
- Miller, D., Steier, L., & Le Breton-Miller, I. 2003. Lost in time: Intergenerational succession, change and failure in family business. *Journal of Business Venturing*, 18, 513-531.
- Steier, L. 2003. Variants of agency contracts in family financed ventures: The multiple roles of family. *Journal of Business Venturing*, 18, 597-618.
- Chrisman, J., Chua, J., & Steier, L. 2002. The influence of national culture and family involvement on entrepreneurial perceptions and performance at the state level. *Entrepreneurship: Theory & Practice*, 26/4, 113-130.
- Steier, L. 2001. Family firms, plural forms of governance and the evolving role of trust. *Family Business Review*, 14/4, 353-367.
- Steier, L. 2001. Next generation entrepreneurs and succession: Modes and means of managing social capital. *Family Business Review*, 14/3, 259-276.
- Steier, L. 2001. New venture firms, international expansion, and the liabilities of joint venture relationships, *Journal of High Technology Management Research*, 12, 295-321.
- 1991-2000** Steier, L., & Greenwood, R. 2000. Entrepreneurship and the evolution of angel financial networks. *Organization Studies*, 21/1, 163-192.
- Steier, L., & Greenwood, R. 1999. Newly created firms and informal angel investors: A four stage model of network development. *Venture Capital Journal*, 1/2, 511-535.
- Steier, L. 1998. Confounding market and hierarchy in venture capital governance: The Canadian Immigrant Investor Program. *Journal of Management Studies*, 35/4, 511-535.
- Steier, L., & Greenwood, R. 1995. Venture capital relationships in the deal structuring and post-investment stages of new firm creation. *Journal of Management Studies*, 32/3, 337-357.
- Steier, L. 1991. International business and a reconceptualist view of managerial knowledge. *Journal of Teaching in International Business*, 3/1:1-19.
- 1990** Sharma, B., & Steier, L. 1990. Management education and development in Canada: Past, present, and future. *Canadian Journal of Administrative Sciences*, 7/1: 1-10.
- Gephart, R.P., Steier, L., & Lawrence, T.E. 1990. Cultural rationalities in crisis sensemaking: A study of a public inquiry into a major industrial accident. 4/1: 27-48.

Other Publications

2011-18

- Zellweger, T., Chrisman, J.J., Chua, J.H., and Steier, L.P. (forthcoming). "Social structures, social relationships, and family firms", *Entrepreneurship Theory and Practice*, vol. 43.
- Odom, D., Chang, E., Chrisman, J.J., Sharma, P., and Steier, L.P. (2018). "Family business research (2006-2013): Most influential theories and articles", *In Palgrave Handbook of Heterogeneity among Family Firms*. E. Memili & C. Dibrell (Eds.) Palgrave. Book Chapter.
- Chrisman, J. H., Chua, J. H., Le Breton-Miller, I., Miller, D. and L. P. Steier, L.P. (2018). "Governance mechanisms and family firms", *Entrepreneurship Theory and Practice*, vol. 42.
- Carr, J.C., Chrisman, J.J., Chua, J.H., and Steier, L.P. (2016). Challenges to intergenerational wealth transfer in family firms. *Entrepreneurship Theory and Practice*, 40.
- Steier, L.P., Chrisman, J.J., and Chua, J.H. (2015). Governance challenges in family businesses and business families. *Entrepreneurship Theory and Practice*, 39, 1265-1280.

Nordstrom, O., & Steier, L. 2015. Social capital: a review of its dimensions and promise for future family enterprise research. *International Journal of Entrepreneurial Behavior & Research*, 21/6: 801 - 13.

Jennings, J.E., Reay, T. & Steier, L.P. (2014). Review of *The SAGE Handbook of Family Business*. *Academy of Management Learning and Education*.

Wright, M., Chrisman, J.J., Chua, J.H., and Steier, L.P. 2014. Family enterprise and context. *Entrepreneurship Theory and Practice*, 38, 1247-1260.

Chrisman, J.J., Sharma, P., Steier, L.P., and Chua, J.H. 2013. The influence of family goals, governance, and resources on firm outcomes. *Entrepreneurship Theory and Practice*, 37 (6).

Chua, J.H., Chrisman, J.J., Steier, L.P., and Rau, S.B. 2012. Sources of heterogeneity in family firms: An introduction. *Entrepreneurship Theory and Practice*, 36, 1103-1113.

Chrisman, J.J., Chua, J.H., Steier, L.P. 2011. Resilience in family firms: An introduction. *Entrepreneurship Theory and Practice* (35): 1107-1119. Intro to special issue

G. T. Lumpkin, Lloyd Steier, Mike Wright. 2011. Strategic Entrepreneurship in Family Business. *Strategic Entrepreneurship Journal* (5): 285–306. Intro to special issue.

2001-2010

Eddleston, K.A., Chrisman, J.J., Steier, L.P. and Chua, J.H. 2010. Governance and Trust in Family Firms: An Introduction. *Entrepreneurship Theory and Practice*. 34/6: 1043-1056.

Chrisman, J., Steier, L., & Chua, J. 2009. Embeddedness Perspectives of Economic Action within Family Firms. Introduction to *Entrepreneurship Theory and Practice*. 33/6:1157.

Chrisman, J., Steier, L., & Chua, J. 2008. Toward a theoretical basis for understanding the dynamics of strategic performance in family firms. *Entrepreneurship Theory and Practice*. 32/6: 935-947.

Heck, R.K.Z., Hoy, F., Poutziouris, P.Z., & Steier, L.P. 2008. Emerging paths of family entrepreneurship research. *Journal of Small Business Management*. 46/3: 317-330.

Steier, L. 2007. Creating lasting value in family firms. *Globe and Mail*. November 12. BF2.

Miller, D., Steier, L., & Le Breton-Miller, I. 2006. Lost in time: intergenerational succession, change and failure in family business. In P. Poutziouris, K. Smyrniotis & S. Klein (Eds.) *Handbook of Research on Family Business*. Cheltenham, UK: Edward Elgar Publishing.

Chrisman, J.J., Steier, L.P., & Chua, J.H. 2006. Personalism, particularism, and the competitive behaviors and advantages of family firms: An introduction. *Entrepreneurship Theory and Practice*. 30/6: 719-729.

Steier, L. 2005. When it comes to financing new ventures, don't think of "family" as a last resort. *U of A Business*, Fall/Winter 05-06: 40.

Morck, R., & Steier, L. 2005. The global history of corporate governance: An introduction." In R. Morck (ed.), *The history of corporate governance around the world: Family business groups to professional managers*. pp. 1-64. Chicago: Chicago University Press & National Bureau of Economic Research.

Steier, L. 2005. Executive succession in entrepreneurial business. In M. Hitt & D. Ireland (eds.), *The Blackwell encyclopedic dictionary of entrepreneurship* (2nd ed.), vol.2: pp. 125-128. Oxford: Blackwell.

Chrisman, J., Chua, J., & Steier, L. 2005. Sources and consequences of distinctive familiness: An introduction. *Entrepreneurship Theory and Practice*, 29/3, 238-247.

Steier, L. 2005. Lend a hand and make a success story. *Families in Business*, July/August, no.21: 15-17.

Steier, L. 2005. Commentary 1 on case study: How to bridge gap when two partners have opposing visions for the company's operation. *Families in Business*, July/August, no.21: 19.

Steier, L., Chrisman, J.J., & Chua, J. 2004. Entrepreneurial management and governance in family firms: An introduction. *Entrepreneurship Theory and Practice*, 28/4, 295-303.

Poutziouri, P.Z., Steier, L., & Smyrniotis, K. 2004. Guest editorial: Commentary on family business entrepreneurial developments. *International Journal of Entrepreneurial Behaviour & Research*. 10: 7-11.

Miller, D., Steier, L., & Le Breton-Miller, I. 2004. Trois modeles classiques d'echec de la succession intergenerationnelle dans l'entreprise familiale. *Gestion: Revue Internationale de Gestion*. 29/3: 109-119. (Translated from article in ETP).

Steier, L. 2004. The subtle side: Innovation is not confined to technological advances. *Alberta Venture*. June. 123-4.

Reay, T. & Steier, L. 2004. The case of the prodigal daughter. In J.H. Astrachan, P. Poutziouris, & K. Soufani (eds.), *Family Business Casebook Annual 2004*. pp.77-90. Kennesaw, GA: Cox Family Enterprise Center.

Steier, L., & Greenwood, R. 2003. Venture capitalist relationships in the deal structuring and post-investment stages of new firm creation. In Wright, M., Sapienza, H.J., & Busenitz, L.W. (eds.), *Venture Capital*. 2:168-188. Reprinted from *Journal of Management Studies*. 32(3):337-57.

Chrisman, J, Chua, J., & Steier, L. 2003. An introduction to theories of family business." *Journal of Business Venturing*. 18, 441-448.

Chrisman, J., Chua, J., & Steier, L. 2003. Extending the theoretical horizons of family business research. *Entrepreneurship: Theory and Practice*, 27/4, p.331-338.

Steier, L. 2002. Exploring the role of trust in family firm governance. In J. Chrisman, J. Holbrook & J. Chua (eds.), *Innovation and Entrepreneurship in Western Canada: From Family Businesses to Multinationals*. Calgary, AB: University of Calgary Press.

1990-1999

Steier, L. 1995. Working successfully with venture capitalists. *The Bowne Review For Chief Financial Officers & Investment Bankers*, Vol. 6.

Steier, L., & Greenwood, R. 1995. Sun country foods. In M. Hitt, G. Ireland & R. Hoskisson, *Strategic management: Competitiveness and globalization*. West.

Steier, L., & Chambers, E.J. 1992. An empirical study of prospective managers values and ethics. In D. Ludwig & K. Paul (Eds.), *Contemporary Issues in the Business Environment*. Lewiston, NY: Edwin Mellen.

Proceedings

Steier, L. 2003. Unraveling the familial sub-narrative in entrepreneurship research. *Frontiers of Entrepreneurship Research*. Proceedings of the Babson Kauffman Entrepreneurship Research Conference, p.258-272.

Steier, L. 2001. Prodigal Daughter. In P. Poutziouris & D. Pistrui (eds.), *Family Business Research in the Third Millennium*. Proceedings of Family Firm Institute Research Workshop, p.134-140.

Steier, L. 2000. Next generation entrepreneurs and succession: Modes and means of managing social capital. *Tradition or Entrepreneurship in the New Economy?* Academic Research Forum Proceedings, Family Business Network Annual World Conference, pp. 329-347.

Steier, L. 2000. Collaborative Advantage, Entrepreneurial Finance, and the Evolution of Angel Networks. In L. Steier (ed.), *Technology Commercialization, Collaboration, and Financing the Entrepreneurial Venture*. pp. 14-28. Symposium Proceedings, Edmonton: CEFE.

Shrader, R., Steier, L, McDougall, P., & Oviatt, B. 1997. Venture capital and characteristics of new venture IPOs. *Frontiers of Entrepreneurship Research*. Proceedings of the Babson Kauffman Entrepreneurship Research Conference.

Steier, L. 1992. Looking beyond our positivist legacy. In J.L.Wall & L.J. Jauch (Eds.), *Academy of Management Best Papers Proceedings*, 128-132.

Steier, L. 1992. Management education within the context of higher education environment: A comparative view of the Canadian American systems. *Administrative Sciences Association of Canada Proceedings*, MED Division, Quebec City, QC.

Townley, B., & Steier, L. 1991. Reassessing or reconfirming strategy? Strategic initiatives and their approaches to knowledge. *Administrative Sciences Association of Canada Proceedings*. Niagara Falls, ON, June.

Conference Presentations

- 2018—“Enduring Entrepreneurship: Family Farms and 100Years of Adaptation and Change on the Great Plains of North America.” European Academy of Management, Reykjavik, Iceland, June.
- 2018--Invited keynote: “Family Business Research: Lessons for Entrepreneurship.” European Institute for Advanced Studies in Management, Workshop on Family Firm Management Research. Larnaca, Cyprus, May.
- 2017—“Family Enterprises as Adaptive Systems: The Creation, Organization and Evolution of Homesteader Farm Families in Canada 1910-2017.” Invited presentation, Second Tel Aviv Family Business Research Conference, Tel Aviv University, June 25-27.
- 2017—“Macro—and Micro—Level Patterns of Organizing Family Farms in Canada’s Breadbasket.” Paper presented at the Organization Studies summer workshop “Food Organizing Matters: Paradoxes, Problems and Potentialities” Chania, Crete, Greece, May 18-20.
- 2016--Opening Plenary: “How Can We Be More Relevant to One Another?” Family Firm Institute Research and Education Symposium, Miami.
- 2015-Distinguished Speaker for Professional Development Workshop, Academy of Management Annual Meeting, Vancouver. Topic: "Nurturing Scholars New to Family Entrepreneurship."
- 2011 - Family Enterprise Education and Development: Exploring multiple markets and methods of delivery, *Family Firm Institute Conference*, Boston, MA. October.
- 2010 - “Developing Comprehensive Education Programs in Full-Service University Settings: University of Alberta”, with Feth, S., & Reay, T. *Family Firm Institute Conference*, Chicago, IL. October.
- 2010 - Keynote: “Innovation Amidst Diversity of Family Business Education, Educators, and Institutions”. *Family Firm Institute Conference*, Chicago, IL. October.
- 2010 - Symposium discussant: “Exploring Identity Issues in Family Firms”. *Academy of Management Annual Conference*, Montreal. August.
- 2008 - “Evolutionary patterns of governance in entrepreneurial family firms”, with Miller D. *IFERA Annual Conference*, Nyenrode Business University, The Netherlands. July.
- 2008 - “Circumventing sub-optimal transitions in family firms: A commentary”. *Theories of Family Enterprise*, University of Alberta, Edmonton. May.
- 2007 - “Strategic approach in family and non-family Canadian wineries”, with Reay, T. & Hinings, C.R. *International Family Enterprise Research Academy Annual Conference*, European Business School, Germany. June.
- 2007 - Commentary on “Management buy-outs and succession in family-owned firms”, with Chrisman, C. & Chua, C. *Theories of Family Enterprise*, Mississippi State University, Starkville, MS. May.
- 2006 - Professional Development Workshop: “Family business as a field of study”, with Lubatkin, M., Stewart, A., Whetten, D., & Zahra, S. *Academy of Management Annual Conference*, Atlanta, GA. August.
- 2005 - “Firm governance, familial capitalism and entrepreneurship in global contexts”. *Max Planck Institute for Research into Economic Systems Workshop: Governance and Entrepreneurship: Merging Economic and Managerial Perspectives*, Jena, Germany. October.
- 2005 - “Distinctive patterns of organizing within entrepreneurial family firms”. *Academy of*

- Management Annual Conference*, Honolulu, HI. August.
- 2005 - "The creation and organization of new family firms", with Reay, T. *Western Academy of Management Conference*, Las Vegas, NV. March.
- 2004 - "Can families earn entrepreneurial rents?", with Habbershon, T., & Pistrui, J. *Decision Science Institute*, Boston, MA. November.
- 2003 - "Unraveling the familial sub-narrative in entrepreneurship research". *Babson Entrepreneurship Research Conference*, June.
- 2003 - "Celebrating family advantage in business". *International Family Enterprise Research Academy Annual Conference*, Milan, Italy. March.
- 2002 - "Creating and sustaining capabilities in family firms: The importance of the entrepreneurial mindset" with Reay, T. *Academic Research Forum, Family Business Network Annual Conference*, Helsinki, Finland. September.
- 2002 - "Entrepreneurial Networks and the Role of Lawyers". *Academy of Management Annual Conference*, Denver, CO. August.
- 2001 - "Variants of agency contracts in family financed ventures: The multiple roles of family". *Academic Research Forum, Family Business Network Conference*, Rome, Italy. October.
- 2001 - "The case of the prodigal daughter" with Reay, T. *Family Firm Institute Research Workshop*, London, U.K. October.
- 2001 - „Lost in time: Intergenerational succession, change and failure in family business", with Miller, D. & Le Breton Miller, I. *Theories of Family Enterprise*, Academic Conference, University of Alberta, Edmonton. September.
- 2000 - "Next generation entrepreneurs and succession: Modes and means of managing social capital". *Academic Research Forum Family Business Network Annual Conference*, London, U.K. October.
- 1999 - "Young entrepreneurial firms and the liabilities of international joint venture relationships". *Academy of Management Conference*, Chicago, IL.
- 1997 - "Venture capital and characteristics of new venture IPOs" with Shrader, R., McDougall, P. & Oviatt, B. *Babson Entrepreneurship Research Conference*, Babson College.
- 1997 - "Rapporteur, Economic Domain Group, Metropolis". *First National Conference on Immigration*, Edmonton.
- 1997 - "WestJet Inc." *Western Casewriters Association*, Lake Tahoe.
- 1995 - Z.I. Probes Inc. *Western Casewriters Association*, San Diego.
- 1994 - "Configurations of the organizational mind: Strategic change in Canadian Telcos" with Pant, N. *Administrative Sciences Association of Canada, Policy Division*, Halifax.
- 1993 - "Sun Country Foods", with Greenwood, R. *Western Academy of Management Casewriters' Association*, San Jose, CA.
- 1992 - "Priming the pump: Promoting the small business sector in Alberta, 1987-91", with Greenwood, R. *National Entrepreneurship Development Institute*, Montreal.
- 1990 - "Management education: Does internationalizing mean reconceptualizing?" *Western Academy First International Conference*, Shizuoka, Japan. June.
- 1990 - "Emerging paradigms in management education". *Western Academy of Management*, Salt Lake City, UT. March.
- 1988 - "Curricular paradigms for management education". *Administrative Sciences Association of Canada, Management Education Division*, Halifax, NS. June.
- 1988 - "Undergraduate business education: Curricular change and an agenda for research". *American Educational Research Association Annual Conference*, New Orleans, LA. April.
- 1988 - "Managerial decisions: A curricular metaphor". *Western Academy of Management*, Big Sky, MT. March.

Conference Activities

- 2001-2018—Co-organizer of the Theories of Family Enterprise Conference”. Co-hosted with Jim Chrisman, Jess Chua, and invited guests. Held every second year at the University of Alberta with conferences held in alternate years at various Universities in the U.S. and Europe.
- 2012 - *Academy of Management Annual Conference*, Boston, MA. August.
- 2012 - Best Paper Reviewer, *International Family Enterprise Research Academy Annual Conference*, Bordeaux, FR. June.
- 2012 - Session Chair: Formation and transfer of goals and values within family firms, *International Family Enterprise Research Academy Annual Conference*, Bordeaux, FR. June.
- 2012 - Organizer and Co-host: *Annual Theories of Family Enterprise Conference*, Edmonton, AB. May.
- 2012 - Panel: Internationalization of family business studies: The Asia-Pacific and North American view, *Family Enterprise Research Conference*, Montreal, QC. May.
- 2012 - Panel: Internationalization of family business studies: The European view, *Family Enterprise Research Conference*, Montreal, QC. May.
- 2011 - *Academy of Management Annual Conference*, San Antonio, TX. August.
- 2011 - Swedish based *Jönköping International Business School*, hosted a conference with the intent of publishing a book by SAGE titled: “Theories from family science: A review and roadmap for family business research.” Three chapters were invited from the University of Alberta wherein U of A scholars were lead authors: Professor Jennifer Jennings & Albert James (Ph.D. student); Professor Trish Reay; Dr. Steier. July.
- 2011 - Leader of a Plenary and Panel Discussion: Quo Vadis? on Research - Education - Policy. *International Family Enterprise Research Academy Family Business Policy Forum*, Sicily, Italy. July.
- 2011 - Co-host and facilitator. *Theories of Family Enterprise Conference*, Germany. May.
- 2011 – Panellist for academic keynote by Duane Ireland: “The Promise of Strategic Entrepreneurship for Family Firms”. *Family Enterprise Research Conference*, Grand Rapids, MI. May.
- 2010 - Co-hosted International Family Enterprise Research Academy welcome reception. *Academy of Management Conference*, Montreal. August.
- 2010 - Presentation: Junior Faculty Development, “Career management issues”. *International Family Enterprise Research Academy Annual Conference*, Lancaster, England.
- 2010 - Presentation: “Planning and Writing a Dissertation”. *International Family Enterprise Research Academy Annual Conference*, Lancaster, England.
- 2010 -Session Chair: “Social Capital Papers”. *International Family Enterprise Research Academy Annual Conference*, Lancaster, England.
- 2010 - Awards judge: Best Paper Awards. *International Family Enterprise Research Academy Annual Conference*, Lancaster, England.
- 2010 - Co-host and co-facilitator. *Theories of Family Enterprise Conference*, University of Alberta, Edmonton, AB. May.
- 2009 - Chair for “Networks, Corporate Policy and Governance” session. *Families, Networks and Firms Conference*, Bangkok, Thailand. December.
- 2009 - Co-hosted International Family Enterprise Research Academy welcome reception. *Academy of Management Conference*, Chicago, IL. August.
- 2009 - Awards Committee Chair and Speaker at Doctoral Consortia. *International Family Enterprise Research Academy Annual Conference*, Limessol, Cypress, June.
- 2009 - Co-host and co-facilitator. *Theories of Family Enterprise Academic Conference*. NorthEastern

University, Boston, MA. May.

2008 - Moderating paper presentations. *International Family Enterprise Research Academy Annual Conference*, Nyenrode Business Universiteit, The Netherlands. July.

2008 - Panel Discussion: Entrepreneurial family with Montemerlo, D., & Zellweger, T. *International Family Enterprise Research Academy Annual Conference*, Nyenrode Business Universiteit, The Netherlands. July.

2008 - Co-host and co-facilitator. *Theories of Family Enterprise Academic Conference*. University of Alberta, Edmonton, AB. May.

2008 - Chair for "Family Firms: Works in Progress" session. *Corporate Governance and Politics of Finance*, Sakura, Japan. March.

2007 - Chair for paper presentation on environment and culture. *International Family Enterprise Research Academy Annual Conference*, European Business School, Germany. June.

2007 - Co-host and co-facilitator. *Theories of Family Enterprise Academic Conference*, Mississippi State University. May.

2007 - Executive committee and facilitator for paper discussion. *Third Annual Office Depot Small Business Research Forum on Family Entrepreneurship*, Ft. Lauderdale, FL. March.

2006 - Chair for two panel discussions and discussant for paper round table session. *Family Enterprise Research Conference*, Niagara Falls, ON. April.

2005 - Co-host and co-facilitator. *Theories of Family Enterprise Academic Conference*, University of Alberta, Edmonton, AB. June.

2004 - Co-sponsor with National Bureau of Economic Research. History of Corporate Ownership: The Rise and Fall of Great Business Families. *INSEAD*. January.

2003 - Co-host and co-facilitator. *Theories of Family Enterprise Academic Conference*, Calgary, AB. December.

2003 - Co-chaired research forum. *Family Business Network Annual Conference*, Switzerland. September.

2003 - Co-led family business track. *International Council for Small Business World Conference*, Ireland. June.

2003 - Co-sponsor with National Bureau of Economic Research. History of Corporate Ownership: The Rise and Fall of Great Business Families. Lake Louise. June.

2002 - Co-host and co-facilitator. *Theories of Family Enterprise Academic Conference*, Philadelphia, PA. December.

2002 - Co-sponsor with National Bureau of Economic Research. History of Corporate Ownership: The Rise and Fall of Great Business Families. Boston. November.

2001 - Co-host and co-facilitator. *Theories of Family Enterprise Academic Conference*, University of Alberta, Edmonton, AB. September.

Invited Presentations 2016-Alberta Business Family Institute/ Family Enterprise Advisors, "The Theory and Practice of Family Business Advising" Calgary, June.

2015-Family Business Research, Jonkoping International Business School, Sweden.

2012 - Presentation to Aboriginal Entrepreneurship pilot group, *Alberta Business Family Institute*, Hobbema, AB. July.

2012 - Panel Moderator: Entrepreneurship Career Forum, *University of Alberta Career and Placement Services*, Edmonton, AB. March.

2011 - The evolution of strategy and governance in entrepreneurial Canadian family firms, *CGIO Family Business Roundtable 2011: Governance and Survival of Family Firms*, Singapore. November.

2011 - Discussant: Effects of Independent and Friendly Outside Directors by Sung Wook Joh, *Seoul*

- National University*, RICF International Conference 2011: Frontiers in Corporate Finance and Corporate Governance, Japan. November.
- 2011 – *Alberta Business Family Institute* Signature Events, the Stanton Family (Running Room). Calgary, delivered greetings on behalf of the Dean. Edmonton, attended as CEFE chair. October.
- 2011 - *VenturePrize* opening seminar guest. Gave presentation on “Elements of a Business Plan”, Edmonton, AB. September
- 2011 - “The Alberta Opportunity: Wealth Management Advice to Successful Entrepreneurs and Their Families” at Wealth Management @Latitude 53 seminar for *Edmonton Chartered Financial Analysts Society*. April.
- 2010 - Presented at *Alberta Family Business Institute* Signature Event. October.
- 2010 - “Entrepreneurship, Innovation and Societal Wealth Creation in the Family Business Context” for *University of Alberta Calgary Centre’s Speaker Series*. September.
- 2010 - “Elements of a Business Plan” at *Ventureprize* opening seminar. September.
- 2010 - Invited Guest/Visiting Scholar, *Instituto de Empresa Business School*, Spain. May.
- 2009 - Invited guest, *Indian Business School*, India. December.
- 2009 - Panelist “Looking forward to 2020, how should the Alberta advanced learning and innovation system be positioned to help Alberta thrive in the next generation economy?” Strategy session with *Alberta Advanced Learning*. May.
- 2009 - Advising Business Owners – and Their Families – Over Time. *Society of Trust and Estate Practitioners*. March.
- 2007 - Managing shared assets: Lessons from the family cabin, with Anselmo, G., Coskey, G., & Renaud, P. *Alberta Business Family Institute*. September.
- 2007 - Emerging paths of family entrepreneurship research, with Heck, R., Hoy, F., & Poutziouris, P. *Third Annual Office Depot Small Business Research Forum: Family Entrepreneurship*. Fort Lauderdale, FL. March.
- 2007 - Family business research and development in global and Canadian contexts: A case of boundless opportunity, with Sharma, P. *Ivey School of Business Colloquium*. Toronto. March
- 2006 - Organization creation, venture capital, family business, entrepreneurship and global manifestations of familial capitalism: Working at the intersection, *Ivey School of Business*, London, ON, October.
- 2006 - Governance for business families: Building value from the outside in, with Grace, B., & Roozen, H. *Alberta Business Families Institute*. Edmonton, May.
- 2006 - Family businesses, altruism, and confounded notions of agency contracts. *Seattle University Law School*, Seattle, April.
- 2006 - The paradox of change and continuity in family business. Three presentations: *Ankara Chamber of Industry Conference on Family Enterprise*; *Middle East Technical University Technopolis*; and faculty group at Bilkent University, Anakara, Turkey, March.
- 2006 - The important role of family business in national and global economies. *Hangzhou University*, March.
- 2005 - A university model for family enterprise, with Dyck, S., Jennings, J., Le Breton Miller, I., & Miller, D. *Canadian Business Family Symposium, Alberta Business Family Institute*, Edmonton. November.
- 2005 - Sibling partnerships: Best and worst practice. *Eric Geddes Lecture Series*, Edmonton. November.
- 2005 - Structural issues in doing quality research. *Family Firm Institute Family Business Research & Education Symposium*, Chicago. October.
- 2005 - Sibling partnerships as best and worst practice in family business. *Alberta Family Mediation*

- Society*. May.
- 2004 - Advising the family business for sustainability and success. *Sauder School of Business, University of British Columbia, Business Families Centre*. November.
- 2004 - Strategic planning in the family firm. *Sauder School of Business, University of British Columbia, Business Families Centre*. November.
- 2004 - Selecting a successor. *John Molson School of Business, Family Business Forum*, Montreal. June.
- 2004 - Familial sub-narratives in business. *Walter Johns Alumni Circle*, Edmonton. April.
- 2004 - Business success: Family might be more important than you think. *University of Alberta School of Business Alumni Breakfast*, Calgary. March.
- 2004 - The story behind the story: The family behind the entrepreneur. *Eric Geddes Lecture Series*, Edmonton. January.
- 2003 - Making sense of your family and your business: The YPO experience. *Relating to the Family Business and the Business Family, YPO Seminar*, Edmonton. November.
- 2003 - Leading family business research initiatives, with Morck, R. Plenary session for *Research Forum of the Family Business Network Annual Conference*, Lausanne. September.
- 2003 - The family affair. *Society of Trust and Estate Practitioners*. Red Deer & Calgary. May.
- 2003 - Celebrating the advantages of the family enterprise. *Centre for Entrepreneurship and Family Enterprise*, Edmonton. November.
- 2001 - Advising the family business. *Centre for Entrepreneurship and Family Enterprise*, Edmonton. November.
- 2001 - Managing change with farm succession clients. *Alberta Agriculture*.
- 2001 - Family firm governance and the dynamics of trust. *European Group for Organizations Studies Research Colloquium*, Lyon, France. July.
- 2001 - Alliance advantage: The importance of strategic networks. *Edmonton Chapter of the Strategic Leadership Forum*. February.
- 2000 - Strategic Planning and E-Business. *E-Business and Your Business Seminar, Centre for Entrepreneurship and Family Enterprise*, Edmonton. November.
- 2000 - Social capital: Passing it on. *Centre for Entrepreneurship and Family Enterprise and Canadian Association of Family Enterprise (Edmonton Chapter)*. October.
- 2000 - How do you fire the advisor who sang at your father's funeral? *Canadian Association of Family Enterprise National Conference*. May.
- 2000 - Exemplary firms and value-added agriculture. *A Focus on Value-Added Agriculture, Centre for Entrepreneurship & Family Enterprise*. April.
- 1999 - Angel investors and venture capital. *Business Incubator Management Group and Selected Entrepreneurs*, City of Xian, China.
- 1997 - Invited luncheon speaker, *St. Albert Chamber of Commerce*.
- 1994 - Keynote speaker, annual meeting of *Alberta School Boards Association*.
- 1990 - Human resources development as an integral component of organizational strategy Alberta Government, Major Symposium, *The Insightful Manager*.
- 1990 - Organizational effectiveness within the academic environment. *Administrative Professional Workshop*, U of A.
- 1990 - Strategic human resources management. *County of Parkland Administrators Workshop*.
- 1989 - Epistemological challenges for the next generation AI and expert systems, with MacKay, D.A. *Symposium on the Advent of Artificial Intelligence in Higher Education*, Prague Czechoslovakia.

1988 - Management education and development in Canada, with Sharma, B., & Desroches, J.
Canadian Federation of Deans of Management and Administrative Studies, Toronto.

**Editorial
Activities**

Editorial board for *Academy of Management Perspectives*, 2008-present

Editorial board for *Family Business Review*, 2006-present

Editorial board for *Entrepreneurship Theory & Practice*, 2004-14

Editorial Board for *Journal of Family Business Strategy*, 2009-present

Ad hoc reviewer for the following publications and organizations:

Administrative Sciences Association of Canada

European Science Foundation

Family Business Research Conference;

International Family Enterprise Research Academy

Journal of Business Research;

Journal of Business Venturing;

Journal of Management Studies;

Journal of Organizational Behavior;

Journal of Small Business Management;

Organization Studies;

Small Business Economics: An International Journal;

Social Sciences and Humanities Research Council of Canada;

Venture Capital,

Co-edited special issue of *Strategic Entrepreneurship Journal* (special issue: "Strategic Entrepreneurship in Family Business." 2009.

Co-edited annual special "family enterprise" issues of *Entrepreneurship: Theory & Practice* (2003-2018) focused on family enterprise.

Co-edited special issue of *Strategic Entrepreneurship Journal* (special issue: "Strategic Entrepreneurship in Family Business." (2009).

Co-edited special issue of *International Journal of Entrepreneurial Behaviour & Research* (2004, v.10) focused on family enterprise.

Co-edited special issue of *Journal of Business Venturing* (2003 18/4) focused on family enterprise.

Poutziouris, P., & Steier, L. (eds.) 2003. *New Frontiers in Family Business Research: The Leadership Challenge*. Family Business Network Research Forum Proceedings.

Steier, L. (ed.) 2000. *Technology Commercialization, Collaboration, and Financing the Entrepreneurial Venture*. Symposium Proceedings, Edmonton: Centre for Entrepreneurship and Family Enterprise.

**Research
Grants, Awards,
& Recognition**

2015. Ranked by *Hot Topics*, a tech-oriented business magazine, as one of the top 100 Professors globally who have helped shape the direction of entrepreneurship education.

2010. Barbara Hollander Award recipient, bestowed annually in honor of Family Firm Institute's founding president, to the individual who best exemplifies her "love of education and learning, commitment to social causes, dedication to civic responsibility, and belief in the human capacity to change for the better."

2008 Visiting Professor, Institute of Economic Research, Hitotsubashi University, Japan.

2008-09 McCalla Professorship \$32,000

2007-08 Killam Professorship

SSHRC Subgrant \$46,000 *Competitive Advantage in Family Business*

SSHRC Subgrant \$47,500 *Competitive Advantage in Family Business*

Family Enterprise Endowment of \$5 Million includes significant annual funding for research initiatives.

VenCap - F. Newton Hughes Fund, \$9,000 *The Relationship Between Screening and Performance in Venture Capital Investment Activity*

Nova Fellowship, \$12,000 *Entrepreneurial Approaches to the Commercialization of University Based R & D*

SSHRC Grant \$2,000,000 over six years *Prairie Centre of Excellence For Research on Immigration and Integration* (a prairie consortium of universities centered at the University of Alberta; co-investigator within the U of A team)

J. D. Muir Research Award \$3,000 *Immigrant Investor Programs: Criteria Distinguishing Successful from Unsuccessful Ventures*

J.D. Muir Research Award \$3,000 *Collaborative Relationships in Co-Investment Activity: A Study of Venture Capitalists and Newly Founded Firms*

Outstanding Paper Award, Western Academy of Management, 1990

National Entrepreneurship Development Institute \$21,000 *Small Business Start-Ups*

Research Awards Committee, Faculty of Business, \$3,000 *Linking Organizational Growth to Founding Strategy in Newly Established Firms* (with R. Greenwood)

Teaching

GEN 503--Assessment Tools for Family Business Advisors. New York, Jan. 2016; Miami, Oct. 2016.

PHD Seminar-*Current Topics in Family Business*.

MBA/EMBA – *New Venture Creation and Organization* (OA 631), ongoing.

Executive Education – *Introduction to Core Concepts: Strategic Management and Business Planning; Leading and Managing Change; Effective Governance and the Family Firm*, ongoing.

MBA & BCom – *Development of new courses in Family Enterprise*, ongoing

Imperial College (London, UK) – MBA Elective: *Entrepreneurship, Innovation & Family Enterprise* - April 30 - May 11, 2012.

Alberta Business Community – *Business Planning Seminars* (part of annual VenturePrize Business Plan Competition), 2002-2010.

EMBA – *New Venture Creation and Organization*, 1998-2004.

MBA – *Business Plan Bootcamp*, March 2002.

CFO Leadership Program – *Corporate and Competitive Strategy*, October 2001.

Xi'an Jiatong University, China School of Management – *New Venture Creation and Organization* (Canada-China Management Education Program), May 2000.

MBA – *New Ventures Management* (OA 560), 1997-8.

MBA – *Organizational Analysis* (OA 501), 1997-8.

BCom – *Small Business Creation* (BUS 424), 1991-1997.

MBA – *Business Policy* (BUS 676), 1994-5.

Graduate Student Supervision

External examiner for a PhD dissertation at the Jönköping International Business School, Sweden: Maria Jose Parada Balerrama, "Developing Governance Structures in Family Firms."

PhD Committee member, U of A: Alison Minkus, Completed 2015.

Project supervision for PhD student, Onnolee Nordstrom, current.

Teaching Mentor for PhD student, Albert James, Candidacy Exam in 2011.

External Member PhD Defense Committee for Thomas Kenworthy, Haskayne School of Business, 2008, Calgary.

Independent study with Dean Darwent, MBA granted in 2007

Oral Examining Committee for Bill Foster, PhD granted in 2005

Individual Research Project for Jolene Ali, MBA granted in 2005

Major project supervision for Sandra Dowie, MBA granted in 2004

Independent study with Blake Phillips, MBA granted in 2004

Independent study with Sasha Uhryn, MBA granted in 2002

Supervisory Committee for Gary Latawiec, PhD student 2000-03

Candidacy Committee for Roy Suddaby, PhD granted in 2001

Oral Examining Committee for Thomas Benko, MA granted in 2001

Independent study with Paul Gervais, MBA granted in 2001

Independent study with Marita Hobman, MBA granted in 2001

Independent study with Dawn Marie Latam, MBA granted in 2001

Committee member for William DuPerron, PhD granted in 1997

Committee member for Tim Berrett, PhD granted in 1997

Committee member for Craig Roxburgh, PhD granted in 1996

Committee member for Florence Mae Deans, MS granted in 1996

Candidacy Committee for Gregg Berry, PhD granted in 1996

Teaching Recognition

2007 Killam Professorship

2001 U of A nominee for 3M Teaching Fellowship

2001 FEC nominee for U of A Rutherford Teaching Award

1999 U of A nominee for CASE Canadian Professor of the Year

1999 FEC nominee for U of A Rutherford Teaching Award

1999 U of A nominee for 3M Teaching Fellowship

1998 MBA Award for Teaching Excellence

1996 Overall Faculty Teaching Award

1996 MBA Award for Teaching Excellence

1995 Hokanson Entrepreneurship Award for Program Development

1989 Outstanding Undergraduate Teaching Achievement Award

Service

Vice Dean, Alberta School of Business, 2012-2017

Academic Director, Centre for Entrepreneurship and Family Enterprise, 2000-present.

Academic Director, Alberta Business Family Institute, 2003-present.

Faculty of Business Representative, Education Council, 2009-2013.

Board Member, International Family Enterprise Research Academy (IFERA), 2006-present.

Board Member, Family Firm Institute (FFI), 2010-present.

Vice-Chair, Family Firm Institute

Chair, Editor Search Committee, Family Business Review, 2016-2017.

Board of Directors, Scanimetrics, 2006-present.

Member, John Dobson Centre for Entrepreneurship & Markets Advisory Panel, 2005-present.

Fellow, The Centre for Innovation Studies (THECIS) 2003-present.

Active in University based committees:

- Entrepreneurship and Family Enterprise major
- Executive Education and Life Long Learning
- School of Business Research Awards Committee
- School of Business Library Committee
- School of Business Computer Committee
- U of A Vice-President External Review Committee
- Technology Transfer at the MBA level
- Entrepreneurship and Small Business major

Active role in fund raising: (Carthy Foundation; RBC; CIBC; Bombardier; Epcor; MacGregor).

Evaluator, candidacy for promotion to Professor with Tenure, Richard Ivey School of Business. June 2012.

Evaluator, candidacy for promotion to Professor, Peter B. Gustavson School of Business. November 2011.

Evaluator, candidacy for promotion to Professor with Tenure, University of Tennessee. October 2010.

Evaluator, Evaluated candidates for a position as Hamrin Professor in Family Business, Jönköping International Business School, October 2010.

Lead Facilitator and Organizer, VenturePrize Business Plan Competition Seminars, 2002-2010.

Evaluator, Dr. Carole Howorth's candidacy for appointment to a Chair, Lancaster University Management School. January 2009.

Member, VenturePrize Business Plan Competition Board of Advisors, 2002-2005.

Member, Policy Board for Centre for Enhanced Corporate Reporting, 2005-2006.

Member, Faculty Evaluation Committee, 2003 & 2006.

Member, Midterm site visit of the Major Collaborative Research Initiatives Program, a SSHRC flagship programs, Vancouver. June 2002.

Member, Faculty Selection Committee 2002.

Participant, Met with representatives of Bangladesh University of Engineering and Technology as part of U of A's Institutional Linkage Project regarding entrepreneurship studies.

Judging Panel, 2001 ASTEC Awards.

Facilitator, Mayor's Forum on Downtown Revitalization, City of Edmonton.

Organizer and facilitator, Entrepreneurship Boot Camp: Focus on Value-Added Agriculture, 2000.

Organizer and facilitator, Technology, Collaboration and Financing the Entrepreneurial Venture symposium, 1999.

Facilitator, Development and delivery of strategic planning workshop for Olds College Centre for Innovation Board of Directors.

Facilitator, Development and delivery of strategic planning workshop for Friends of Rutherford House.

Facilitator, strategic planning session for Office of the Public Trustee.

School of Business & U of A Representative, AVAC strategic planning meeting, Calgary. August 2000;

School of Business & U of A Representative, University of California, San Diego, CONNECT Conference. August 2000.

Lead Facilitator, planning retreat for caucus members, Liberal Party of Alberta, 1994.

Member, Small Business Initiatives Task Force, Economic Development Edmonton, 1993.

Co-facilitator, Senior Executive Workshop, “The Icarus Paradox” with Danny Miller, International Human Resources Management Council, Montreal. 1991.

Government Interchange Program, Alberta Career Development and Employment. 1991.

Facilitator, Strategic Management Workshop, Senior Executive Council, Edmonton Catholic Schools. 1991.

Facilitator, Strategic Management Workshop for Senior Managers, Department of Solicitor General, Government of Alberta. 1990.

Member, Trade mission to Iran, sponsored by Alberta Economic Development and Trade for the purpose of establishing an Executive Development program for Iranian senior managers in government, business and industry. 1990.