



DATE: March 20, 2025

TO: Senate

FROM: Dr. David Hornsby, Vice-Provost and Associate Vice-President (Academic), and Chair, Senate Quality Assurance and Planning Committee (SQAPC)

RE: Bachelor of Accounting
New Program Proposal for Information

The Bachelor of Accounting program was initially approved by Senate in April 2024, as a major modification (introduction of a new pathway). In Fall 2024 it was reviewed by the Quality Council and determined that it was in fact a new program. As a result, the additional process steps for the introduction of a new program proposal were required, including an external review.

Over the late fall and early winter, the School of Business and the Office of Academic Programs and Strategic Initiatives (APSI) worked together to complete the required documentation and external site visit.

As per the new program approval process, after the site visit:

- The unit and the Dean prepared responses to the External Reviewer recommendations
- The file was reviewed by a Discussant
- The Discussant report and recommendation were supplied to SQAPC
- SQAPC reviewed the completed file and determined that the program be “approved to commence”

Now that this process has been completed the file is being forwarded to Senate for information. Normally, new programs would be brought to Senate for approval, however, it was confirmed by the Quality Council that if no major program changes had been made since Senate’s initial review of the major modification, an additional approval of the new program would not be required.

You will see in the attached courseleaf documentation that a minor program modification was made. However, this was included in the proposal reviewed by the External Reviewers and the changes being made in courseleaf are minor in nature and therefore, following our current practice, they are also being forwarded to Senate for information.

As next steps the program will be submitted to the Quality Council and Ministry for approval. These approvals are required before the program can commence.

Attachments for information

Self-Study with Appendices (Volume I)

Discussant Report

Site visit Schedule

External Reviewer Biographies

External Reviewers' Report

Unit response to the External Reviewers' Report and Implementation plan

Dean's response to the External Reviewers' Report

Faculty CVs (Volume II)

Courseleaf Entries



Institutional Quality Assurance Process

Bachelor of Accounting

New Program Approval Template

(Volume I)

January 2025

Approvals Table

This table will record that the brief has been approved by: 1) the program lead on behalf of the team; 2) the head of the academic unit or chair of the program committee (in the case of interdisciplinary programs not administered exclusively by one academic unit) on behalf of the unit or program committee; 3) the Faculty Dean(s).

Rebecca Renfro	Jan 6, 2025
<u>Associate Dean, Student Success & Recruitment, Undergraduate Programs</u>	<u>Date</u>
Howard Nemiroff	Jan 7, 2025
Dean	<u>Date</u>

Committees Reviews and Approvals

Vice-Presidents' Academic Research Committee (executive summary)	
Provost's Budget Working Group (executive summary)	
Curriculum Committee	February 12, 2024, September 16, 2024
Faculty Board	February 26, 2024, September 30, 2024
Senate Committee on Curriculum, Admissions on Studies Policy	
Senate Quality Assurance and Planning Committee	
Senate	
Quality Council	

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A. The Program

A.1. Program overview

As a leader in the industry of Accounting education demonstrated through our current CPA accredited programs, Sprott has developed the Bachelor of Accounting Honours (B.Acc.) as a program delivering advanced and in-depth knowledge in the field of accounting at the undergraduate level. The program is designed for students looking to pursue a career in accounting, specifically those interested in pursuing their Chartered Professional Accountants (CPA) designation, post-graduation. The B.Acc. will expose students to innovative accounting topics, providing breadth and depth in the field as identified by the industry, and to support students reaching the program learning outcomes.

Further, CPA Canada has introduced a new competency map intended to build learner's competencies for the future of the CPA profession. CPA has specifically addressed the need to build critical thinking through their Decision Competencies, as well as Foundational Core and Ethical Mindset competencies that address areas of impact in today's business world such as sustainability, equity, diversity and inclusion, Indigenous view, and emerging and transformative technologies. As these shifts happen in the accounting industry, the B.Acc. curriculum has been developed to align with early competency development in the areas addressed in the CPA competency map, as well as providing foundational knowledge required for success should students further pursue Sprott's Master of Accounting and their CPA designation.

The Bachelor of Accounting is a 4-year, 20.0 credit, undergraduate program. The program offers students the option to add one or more Streams in Business Analytics, Corporate Finance, Entrepreneurship, Investments, Supply Chain Management, and Sustainability. The program also includes a co-op option for students interested in work-integrated learning. The program will be offered in-person.

In recognizing opportunities for engaging in Indigenous history, culture, and knowledge, as well as principles of EDI, students will be required to complete the following mini modules as a component of their first year required course, BUSI 1800:

- Indigenous bundle: "The First Peoples: A Brief Overview"
- Sprott EDI bundle: mini module 1

The second year required course, BUSI 2800, is currently implementing the second EDI mini module of the EDI bundle, focused on applied EDI within the business context.

Within the Canadian context, there are only two post-secondary institutions offering a similar undergraduate accounting program: University of Waterloo, Bachelor of Accounting and Financial Management; and Brock University, Bachelor of Accounting. Both programs have a similar 4-year program structure and accounting curriculum and have created a pathway to each school's own Master of Accounting and CPA designation. There is opportunity for Carleton to join this small group of schools offering CPA accredited accounting programs, given the market demand and interest from both

students and employers for skilled graduates in accounting and Carleton could gain a share in the targeted recruitment field of Accounting and leverage early interest of potential students in Accounting.

A.2. Mission and strategic directions

The B.Acc. is in alignment with Sprott's current Strategic Plan:

Principle 1: Transformational Lifelong Learning Journeys

Goal 2: Develop unique curricula and integrated opportunities for experiential learning

Action: Continue to enhance our outstanding of Accounting programs

Further, Sprott's current strategic plan aligns with Carleton's Strategic Integrated Plan. In this case Sprott's Principle 1 is aligned with Carleton's strategic direction:

Share Knowledge, Shape the Future

We will prepare students for success in an ever-changing future

The development of the B.Acc. contributes to this strategic direction by expanding quality academic programming that responds to societal needs. The B.Acc. has been developed with both employer needs and CPA competencies providing input into the curriculum development. In listening to the demands of the industry, the program acknowledges societal needs that have been noted as important in the accounting industry, previously not imbedded in accounting curriculum, such as sustainability, EDI, Indigenous views and emerging technologies.

Specifically, two required courses in the program, BUSI 3013 (Professionalism and Perspectives in Accounting) and BUSI 3014 (Exploring Sustainability in Accounting) will explore theories of professionalism, Indigenous views, equity, diversity & inclusion, and sustainability in application to accountancy, expanding students' knowledge and exposure to key issues facing society today. In addition, BUSI 3040 (Data Analytics and Information Systems for Accounting) will further advance students' knowledge and skills in applying emerging technologies specific to the needs of accounting. By integrating this knowledge and the skills demanded by the industry today, we will also be improving our students' employability skills, contributing to better employability outcomes as targeted in Share Knowledge, Shape the Future.

In recognition of Carleton's Coordinated Accessibility Strategy, the B.Acc. program will be supported by the Sprott Undergraduate Student Services team, already working to support student with disabilities to achieve academic success in our undergraduate programs. The Nicol Building, including the Undergraduate Student Services offices, Undergraduate Student Resource Centre and the classrooms are accessible and inclusive spaces for all students including those with disabilities. Our classroom technology and on-campus supports (ie. Paul Menton Centre, Wellness Services, etc.) are widely used to ensure our students are accommodated appropriately. Further, the program encourages accounting students to engage in experiential learning activities such as the Sprott Student Tax Clinic, which is designed to increase tax literacy and support students that may need assistance in filing their taxes for a wide range of reasons, in-tern building accounting students awareness of the need for accessible services in the community.

A.3. Relationship to other academic programs at Carleton

The B.Acc. program will draw on the following faculties for delivery of the required courses listed below:

- Faculty of Public and Global Affairs: ECON 1001, ECON 1002
- Faculty of Arts and Social Science: SOCI 1005, PSYC 1002
- Faculty of Science: MATH 1009, STAT 2601

These courses are also required courses that are currently delivered in the Bachelor of Commerce Honours program (B.Com.) and have been running for a number of years already in collaboration with our undergraduate programs. The faculties involved support these courses being added to the B.Acc. program as demonstrated in their letters of support.

As most of the 1000 & 2000 level courses in the B.Acc. are also required in the B.Com., undergraduate students may choose to on-ramp into the Bachelor of Accounting program throughout their academic program, dependent on their interest and academic progress, and likewise off-ramp to the Bachelor of Commerce if desired. The B.Com. and B.Acc. will hold the same Academic Progression requirements. This requirement will be used as the criteria to facilitate movement between both programs if desired.

B. Program Learning Outcomes and Assessment

B.1. Program learning outcomes

Table B.1: Learning outcomes

Learning Goals	Learning Objectives
BA1 Knowledge Graduates will be skilled in applying foundational business knowledge to appropriate business contexts.	1.1 Graduates will interpret and critique quantitative and qualitative data to draw conclusions through a summary of findings.
	1.2 Graduates will demonstrate knowledge of equity, diversity and inclusion practices within the context of the globalized business environment
	1.3 Graduates will use financial information, models and datasets to make decisions.
	1.4 Graduates will demonstrate how to apply business theories, concepts and tools to support organizational decision making.
	1.5 Graduates will demonstrate how to identify and apply appropriate technologies to address business issues.
	1.6 Graduates will integrate accounting information across various accounting disciplines to support informed business decisions.

BA2 Collaboration Graduates will be collaborative and effective contributors in team environments that respect the experience, expertise and interest of all members.	2.1 Graduates will demonstrate an understanding of the characteristics of collaborative leadership.
	2.2 Graduates will demonstrate the ability to work effectively in teams.
BA3 Critical Thinking Graduates will be discerning critical thinkers, able to discuss different viewpoints, challenge biases and assumptions, and draw conclusions based on analysis and evaluation.	3.1 Graduates will make decisions by gathering, interpreting and applying information from a variety of sources to address complex business issues.
	3.2 Graduates will identify ethical issues and apply ethical principles in addressing complex business issues.
	3.3 Graduates will apply principles of sustainability when developing new ideas or addressing business issues
BA4 Communication Graduates will be effective and persuasive in their communications	4.1 Graduates will communicate effectively on business topics through oral presentations that provide a clear, rational and persuasive course of action.
	4.2 Graduates will communicate effectively on business topics through written reports that provide a clear, rational and persuasive course of action.
	4.3 Graduates will communicate effectively on business topics through digital channels and platforms that provide a clear, rational and persuasive course of action.
	4.4. Graduates will demonstrate an understanding of the process of planning, managing and undertaking a business project in their communications

B2. Mapping Learning Outcomes to Provincial Degree-Level Expectations (DLEs)

Undergraduate DLEs:

1. Depth and breadth of knowledge
2. Knowledge of methodologies
3. Application of knowledge
4. Communication skills
5. Awareness of the limits of knowledge
6. Autonomy and professional capacity
7. Experiential Learning

Table B.2: Learning outcomes and degree level expectations

Learning Outcomes	Degree Level Expectations Met¹
1.1 Graduates will interpret and critique quantitative and qualitative data to draw conclusions through a summary of findings.	1, 2, 3
1.2 Graduates will demonstrate knowledge of equity, diversity and inclusion practices within the context of the globalized business environment.	1, 6
1.3 Graduates will use financial information, models and datasets to make decisions.	1, 2, 3
1.4 Graduates will demonstrate how to apply business theories, concepts and tools to support organizational decision making	1, 2, 3
1.5 Graduates will demonstrate how to identify and apply appropriate technologies to address business issues.	1, 3
1.6 Graduates will integrate accounting information across various accounting disciplines to support informed business decisions.	1, 2, 3, 7
2.1 Graduates will demonstrate an understanding of the characteristics of collaborative leadership.	5, 6
2.2 Graduates will demonstrate the ability to work effectively in teams.	6
3.1 Graduates will make decisions by gathering, interpreting and applying information from a variety of sources to address complex business issues.	1, 2, 3
3.2 Graduates will identify ethical issues and apply ethical principles in addressing complex business issues.	5, 6
3.3 Graduates will apply principles of sustainability when developing new ideas or addressing business issues.	1, 2, 3
4.1 Graduates will communicate effectively on business topics through oral presentations that provide a clear, rational and persuasive course of action.	4
4.2 Graduates will communicate effectively on business topics through written reports that provide a clear, rational and persuasive course of action.	4, 7
4.3 Graduates will communicate effectively on business topics through digital channels and platforms that provide a clear, rational and persuasive course of action	4, 7
4.4. Graduates will demonstrate an understanding of the process of planning, managing and undertaking a business project in their communications.	1, 2, 3, 4, 6

B.3. Program structure and curriculum map

a. Program structure

The B.Acc. program is a 20.0 credit undergraduate degree, to be completed over 4 years. Of the 20.0 credits, 17.5 credits are required core courses, and 2.5 credits are business and free electives. The program also requires the successful completion of two Employability Passport courses (0.0 credit) to equip students with business-oriented employability skills, similar to other Sprott undergraduate programs. See Appendix 1 for proposed program calendar copy and Appendix 2 for proposed calendar course descriptions.

The mode of delivery for the B.Acc. is in-person. Experiential learning will be explored throughout the program through activities such as case studies, simulations, community tax clinics, and the Employability Passport. B.Acc. students will access the robust offering of experiential learning opportunities available to all Sprott students including the Sprott Student Consulting Group, Sprott Social Impact Hub, Sprott Student Investment Fund, etc. The B.Acc. will also include a Co-operative Education Program (co-op) option with a work-study sequence that is intentionally designed to allow for synergies between the classroom and the work term. Students who are accepted into the co-op program will begin their work terms after the successful completion of the second year of study and must complete a minimum of three work terms throughout their academic studies to graduate with the co-operative education designation.

The graduation requirements of the B.Acc. program are:

- A B.Acc. student who meets the Overall CGPA requirement of 5.0, and the Major CGPA graduation requirement of 6.5 will graduate with B.Acc. Honours
- A B.Acc. student who meets the Overall CGPA requirement of 5.0 but not the Major CGPA requirement of 6.5 is eligible to transfer through Admissions Services to the B.Com. with neither a concentration nor an Honours notation and will then follow the appropriate graduation path as laid out in the B.Com. requirements. See admissions.carleton.ca for more details.

b. Program curriculum map

Table B.3: Program curriculum map summary

I= Introduction of Learning Objective, D=Development of Learning Objective, A=Advancement of Learning Objective

	Knowledge						Collaboration		Critical Thinking			Communication			
	1.1	1.2	1.3	1.4	1.5	1.6	2.1	2.2	3.1	3.2	3.3	4.1	4.2	4.3	4.4
BUSI 1011 1004			I		I										
BUSI 1401	I			I	I				I				I		
BUSI 1800	I	I	I	I	I			I	I		I	I	I		
BUSI 2011	D		D			I									
BUSI 2018 1005	I		I	I					I	I				I	
BUSI 2101	D	D		D			D	D	D	D	D	D	D		
BUSI 2208	I			I				I	D				D		I
BUSI 2301	I		I	I					I	I					
BUSI 2401	D				D				D	I	I	D		D	
BUSI 2501	I		D		I				I						
BUSI 2601				D					D	D			D		

BUSI 2701	I		I	I					I				I	I	
BUSI 2800	I	I	I	I	I		D	D	D	I	I	I	I	I	
BUSI 3011	D		D			D									
BUSI 3013		D				D			D	D					
BUSI 3014			D			D			D		D				
BUSI 3015	D		D			D				I					
BUSI 3017	D		D			D			D	D					
BUSI 3018	D		D	D		D			D						D
BUSI 3040	D				A	D								D	
BUSI 3102	D	I		D				D	D				D		
BUSI 3309				D	D		D	D	I			D	D		A
BUSI 4003						D			D			D			
BUSI 4011	A		D			A									
BUSI 4015	D		D			A									
BUSI 4017	A		A			A	D	D	A	D		D	D		
BUSI 4018	D		D	D		A			D				D		D
BUSI 4020	A		A	A	D	A	D	D	A	A			D		
BUSI 4601		A		A			D	D	A	A	A				
BUSI 4609	A		I	A				A	A		I	A	A		

B.4. Program learning outcomes assessment plan

The Undergraduate Curriculum Review Committee (CRC) consists of the Teaching Area Coordinators for each discipline taught within our undergraduate programs. The CRC develops the assessment plan, determining which course and artifact are the best fit to assess each learning objective. Our Assurance of Learning cycle requires each learning objective to be measured twice in a 5-year period. All artifacts used to assess the learning objectives are course-based assessments. For each learning objective, 20% of the student artifacts are evaluated anonymously using our standard 5-point AoL rubric to determine level of proficiency met for each objective (not proficient, limited proficiency, proficient, strong proficiency, mastery). The AoL assessors are trained PhD students, contract instructors and faculty.

At the end of the assessment year, the CRC is provided with a report from the Manager of Strategy & Quality outlining the assessment results, the achievement of the learning objectives and the relative degree of proficiency of students in the program. The CRC will then review the assessment results and formally respond to the results of each learning objective reported that year. Responses can come in the form of improvements to the measurement itself (i.e., an amendment to the Curriculum Map), an indicator that further assessments are required before changes are made, an explanation of the changes to be made, or an expression of satisfaction with the results as they have been reported. For program adjustments and changes to be made to improve future results, an assessment loop is created whereby future measures are evaluated to see whether the change has had the intended positive impact on students' achievement of learning outcomes. These results are used to "close the loop" on the change, facilitating a continuous improvement cycle for the program itself. Each member of the CRC reports back to their teaching area group, and any curriculum or programmatic modifications brought forward by the CRC are moved to Faculty Board for approval.

Learning Objective	Years to be Assessed	Program Component	Activities and Artifacts
1.1 Graduates will interpret and critique quantitative and qualitative data to draw conclusions through a summary of findings.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment
1.2 Graduates will demonstrate knowledge of equity, diversity and inclusion practices within the context of the globalized business environment.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment
1.3 Graduates will use financial information, models and datasets to make decisions.	2027/28, 2029/30	BUSI 4609	Value Creation Chain & Competitor Analysis Report
1.4 Graduates will demonstrate how to apply business theories, concepts and tools to support organizational decision making.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment
1.5 Graduates will demonstrate how to identify and apply appropriate technologies to address business issues.	2027/28, 2029/30	BUSI 3040	Case Study
1.6 Graduates will integrate accounting information across various accounting disciplines to support informed business decisions.	2028/29, 2029/30	BUSI 4020	Capstone Report
2.1 Graduates will demonstrate an understanding of the characteristics of collaborative leadership.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment
2.2 Graduates will demonstrate the ability to work effectively in teams.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment
3.1 Graduates will make decisions by gathering, interpreting and applying information from a variety of sources to address complex business issues.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment
3.2 Graduates will identify ethical issues and apply ethical principles in addressing complex business issues.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment
3.3 Graduates will apply principles of sustainability when developing new ideas or addressing business issues.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment
4.1 Graduates will communicate effectively on business topics through oral presentations that provide a clear, rational and persuasive course of action.	2027/28, 2029/30	BUSI 4609	Final Presentation
4.2 Graduates will communicate effectively on business topics through written reports that provide a clear, rational and persuasive course of action.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment
4.3 Graduates will communicate effectively on business topics through digital channels and platforms that provide a clear, rational and persuasive course of action.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment

4.4. Graduates will demonstrate an understanding of the process of planning, managing and undertaking a business project in their communications.	2027/28, 2029/30	BUSI 4609	Comprehensive AoL Assignment

BUSI 4609 Strategic Management - Comprehensive AoL Assignment:

This assignment consists of a case study requiring students to respond to questions designed specifically to assess each student's proficiency with our program learning objectives in the B.Com. and B.Acc. The assignment requires students to complete an 8-page written response to 4 questions relating to the case. The assignment has been integrated into the core required course of *BUSI 4609 Strategic Management* since 2023 and is a required assignment to be completed by all students, therefore the results from all students are used each year in our AoL process.

Each of the 4 questions in the assignment focus on students demonstrating and applying their knowledge and competencies developed throughout the program and provide evidence to assess one or more of the program learning objectives. The assessment of the student's proficiency is evaluated against our standard Assurance of Learning (AoL) 5-point rubric. Eleven of the fifteen program learning objectives are assessed through this assignment and the alignment of questions to each of the learning objectives is clearly defined for both the students and the assessors.

BUSI 4609 Strategic Management - Value Creation Chain & Competitor Analysis Report:

This course deliverable in a required core course is a Value Creation Chain & Competitor Analysis which asks students to focus exclusively on the financial analysis of an individual firm and develop a competitor analysis. The written assignment is used as an artifact to assess student's proficiency in financial literacy, learning objective 1.3.

BUSI 4609 Strategic Management – Final Presentation:

As a deliverable of the core course, each student is required to participate in an oral presentation of their Strategic Analysis of their chosen firm. Students develop a 40-minute presentation, including a required slide deck of data as evidence to support their analysis and presentation. Each student's proficiency in oral communication, learning objective 4.1, is evaluated individually during the presentation by the instructor using the AoL rubric.

BUSI 4020 Accounting Capstone – Capstone Report:

The accounting capstone course is designed to be mainly project-based, with experiential learning components focused on the application or integration of knowledge from all accounting disciplines. The projected deliverable for AoL is a written report (reflecting results of a simulation, or a case analysis) which requires students to integrate analysis from financial reporting, taxation, assurance, data analysis and management decision making. The report will be a deliverable in this core course and will be used to assess learning objective 1.6.

BUSI 3040 Data Analytics in Accounting – Case Study:

This case assignment assesses students' ability to use technology like Power BI to address a business question. Based on their understanding and knowledge of the tool, they are required to respond to four questions and use Power BI to create alternative visualizations. The written assignment and accompanying visualization will be used as the artifact to assess learning objective 1.5

All artifacts listed above that are used to assess the B.Acc. learning objectives are pulled from required core courses in the program. Therefore, all students enrolled in the B.Acc. program complete the above artifacts. Our AoL standard requires that a 20% sample is assessed to evaluate student proficiency levels for each objective and then presented to the Curriculum Review Committee. However, if required, we can assess proficiency levels for 100% of students in the program.

B.5. Program essential requirements

Program essential requirements are defined by the Ontario Human Rights Commission as “the knowledge and skills that must be acquired or demonstrated in order for a student to successfully meet the learning objectives of that... program.” The program essential requirements are components that contribute to the achievement of the learning outcomes of the program.

“An appropriate accommodation at the post-secondary level would enable a student to successfully meet the essential requirements of the program, with no alteration in bona fide standards or outcomes, although the way the student demonstrates mastery, knowledge and skills may be altered.”

-Ontario Human Rights Commission’s Policy on Accessible Education for Students with Disabilities (2018)

The aim of accommodation in a post-secondary context is to provide equal opportunities to all students to enjoy the same level of benefits and privileges and meet the requirements for acquiring an education. Based on these principles, an accommodation will be considered appropriate where it will result in equal opportunity for an otherwise qualified student with a disability to attain the same level of performance, or enjoy the same level of benefits and privileges experienced by others, without compromising bona fide academic requirements.

Paul Menton Centre For Students with Disabilities (PMC)

The Paul Menton Centre is responsible for assessing requests for academic accommodation of students with disabilities through evaluations that are carried out on an individual basis, in accordance with human rights legislation and University policy, and with the support of relevant, professional/medical documentation. Students will only receive academic accommodation if the functional limitations of their disability impact directly on their academic performance.”

The program essential requirements of the proposed Bachelor of Accounting program have been reviewed in consultation with the Paul Menton Centre to ensure capacity for reasonable academic accommodation of students with disabilities, in accordance with the Carleton University Academic

Accommodation Policy. The learning outcomes can be attained as outlined in the program description with the use of appropriate academic accommodations.

C. Governance

The Associate Dean, Student Success and Recruitment, Undergraduate Programs has oversight over all undergraduate programs within the Sprott School of Business, including the Bachelor of Commerce, Bachelor of International Business, and the proposed Bachelor of Accounting. This Associate Dean is responsible for ensuring the integrity of the B.Acc., and in collaboration with Teaching Area Coordinators, Sprott administrative staff, and University Registrar's and Admissions services guides the strategic direction of all student success activities for the B.Acc. from admissions to graduation. The Associate Dean is accountable for student progression and leads the resolution of student success problems. This includes oversight over course scheduling activities and over the allocation of teaching assignments for faculty.

The Associate Dean, Student Success and Recruitment, Undergraduate Programs chairs the Undergraduate Curriculum Review Committee (CRC) and is further responsible for quality assurance and all Assurance of Learning (AOL) activities therein to assess and measure program learning outcomes. The Associate Dean will also engage with the B.Acc. Advisory Board, engaging industry professionals in a consultative capacity on a yearly basis, to contribute to the direction and development of B.Acc. curriculum, reporting recommendations to the CRC. All proposals for program and curriculum changes are presented by the CRC for approval at Faculty Board and subsequently to applicable University central committees.

The B.Acc. will be administered and supported by the Sprott Undergraduate Services Office under the supervision of the Manager, Undergraduate Programs, who is tasked with ensuring that actions taken by the CRC are operationalized and implemented, overseeing the work of eleven staff members including one full-time Undergraduate Program Administrator, one full-time Experiential Learning Assistant, and three full-time Program Advisors who are directly tasked with the administration of day-to-day program and student success activities. These activities include course and scheduling administration ensuring the delivery of conflict free schedules, student advising and early warning interventions to support student wellbeing and academic success, review of student records for progression and academic continuation, course registration and audit checks, planning for graduation, etc. These roles are crucial in assisting students with navigating their program successfully. The Manager, Undergraduate Programs, is accountable for the effective and efficient functioning of the Sprott Undergraduate Services Office, confirming that student success issues are brought forward and resolved, and for liaising with University Registrar's Services to extend existing services to B.Acc. students, ensuring their seamless progression through their program.

As an Undergraduate program, the B.Acc. will be governed by the rules and regulations outlined in the Undergraduate Calendar, including regulations pertaining to student progression under the Academic Continuation Evaluation requirements. Additionally, the Undergraduate Admissions Office is tasked with the processing of applications for admission for all undergraduate programs at Carleton including the

B.Acc.; however, consulting with the Associate Dean and Manager, Undergraduate Programs to ensure that policies and regulations are interpreted and applied as intended.

D. The Faculty

D.1. Faculty appointed to the unit or program.

Expertise to deliver this program is already in place with existing faculty members. Currently, the Accounting teaching area is represented by 15 faculty, 8 of which are full, associate or assistant professors, and 7 are associate or assistant professors in the teaching stream, with a balance between both senior and junior area members amongst the 15 faculty. Given the nature of accounting, our faculty breakdown represents both research academics and practitioners contributing to industry insights and leading to a balance of theory and practice necessary in the program and in the industry.

All other required courses in the B.Acc. that are not accounting courses are also required business courses in our B.Com. program and represent the other business disciplines that are core to our undergraduate degree. These courses are already being offered by our faculty and will continue to be delivered by the current faculty with B.Com. and B.Acc. students enrolling in the same course.

The following instructors listed in Table D.1 represent all Sprott faculty.

Table D.1: Faculty at Sprott

Faculty Name	Rank	Appointment Status	Percentage Appointment	Supervision Privileges*	Area of Specialization/Field Affiliations
Al Guindy, Mohamed	Associate Professor	Tenured	100%	D	Finance
Anderson, Troy	Associate Professor, Teaching Stream	Tenured	100%	No	Management
Bae, Jinsun	Assistant Professor	Not Tenured	100%	CD	International Business
Bailetti, Antonio	Associate Professor	Tenured	100%	D	Entrepreneurship
Bailetti, Eduardo Carlos	Assistant Professor, Teaching Stream	Not Tenured	100%	No	Entrepreneurship
Bajwa, Jasdeep	Assistant Professor, Teaching Stream	Not Tenured	100%	No	Accounting
Becker, Hilary	Associate Professor	Tenured	100%	D	Accounting
Brouard, Francois	Full Professor	Tenured	100%	D	Accounting
Bujaki, Merridee	Full Professor	Tenured	100%	D	Accounting
Butler, Shannon	Associate Professor, Teaching Stream	Tenured	100%	No	Accounting
Cai, Shaohan (Alan)	Full Professor	Tenured	100%	D	Supply Chain
Colbourne, Rick	Assistant Professor	Tenured	100%	D	Entrepreneurship
Cooper, Hayley	Associate Professor, Teaching Stream	Tenured	100%	No	Accounting
Couchoux, Oriane	Assistant Professor	Not Tenured	100%	CD	Accounting
Darmody, Aron	Associate Professor	Tenured	100%	D	Marketing
Deng, Qi	Assistant Professor	Not Tenured	100%	CD	Data Analytics
Dionisi, Angela	Associate Professor	Tenured	100%	D	Management
Doha, Ahmed	Associate Professor	Tenured	100%	D	Supply Chain
Duxbury, Linda	Full Professor	Tenured	100%	D	Management
Fain, Nusa	Assistant Professor	Not Tenured	100%	CD	Entrepreneurship
Farivar, Samira	Assistant Professor	Not Tenured	100%	CD	Information Systems
Fernando, Naomi	Lecturer, Teaching Stream	Not Tenured	100%	No	Accounting
Few, Rowland	Associate Professor, Teaching Stream	Tenured	100%	No	Entrepreneurship
Firoozi, Maryam	Assistant Professor	Tenured	100%	D	Accounting

Fraser, Devin	Assistant Professor, Teaching Stream	Not Tenured	100%	No	Accounting
Grant, Gerald	Full Professor	Tenured	100%	D	Information Systems
Gray, Emily	Associate Professor, Teaching Stream	Tenured	100%	No	Accounting
Gulanowski, Daniel	Associate Professor	Tenured	100%	D	International Business
Hayibor, Sefa	Associate Professor	Tenured	100%	D	Management
Helal, Robert	Associate Professor, Teaching Stream	Not Tenured	100%	No	Marketing
Hine, Michael	Associate Professor	Tenured	100%	D	Data Analytics
Isabelle, Diane	Associate Professor	Tenured	100%	D	International Business
Ji, Shaobo	Full Professor	Tenured	100%	D	Information Systems
Jiang, Guoliang (Frank)	Associate Professor	Tenured	100%	D	International Business
Jones Joannis, Emily	Assistant Professor, Teaching Stream	Not Tenured	100%	No	Information Systems
Keddie, Leanne	Associate Professor	Tenured	100%	D	Accounting
Kwan, Ernest	Associate Professor	Tenured	100%	D	Supply Chain
Lee, Ian	Associate Professor	Tenured	100%	D	Management
Li, Shi	Assistant Professor	Not Tenured	100%	CD	Finance
Lu, Irene	Associate Professor	Tenured	100%	D	Marketing
McIntyre, Michael	Full Professor	Tenured	100%	D	Finance
McKay, Ruth	Associate Professor	Tenured	100%	D	Management
McShane, Lindsay	Associate Professor	Tenured	100%	D	Marketing
Mohsni, Sana	Associate Professor	Tenured	100%	D	Finance
Muegge, Steven	Associate Professor	Tenured	100%	D	Entrepreneurship
Nardon, Luciara	Full Professor	Tenured	100%	D	International Business
Neilson, Leighann	Associate Professor	Tenured	100%	D	Marketing
Nelson, Rodney	Associate Professor, Teaching Stream	Tenured	100%	No	International Business
Nemiroff, Howard	Associate Professor	Tenured	100%	D	Finance
Nsakanda, Aaron	Associate Professor	Tenured	100%	D	Supply Chain
Otchere, Isaac	Full Professor	Tenured	100%	D	Finance

Pupco, Shani	Lecturer, Teaching Stream	Not Tenured	100%	No	Management
Ramirez, Alejandro	Associate Professor	Tenured	100%	D	Information Systems
Renfro, Rebecca	Associate Professor, Teaching Stream	Tenured	100%	No	Accounting
Ritchie, Robin	Associate Professor	Tenured	100%	D	Marketing
Rojas-Mendez, Jose	Full Professor	Tenured	100%	D	International Business
Ruff, Katherine	Assistant Professor	Tenured	100%	D	Accounting
Sakka, Ouafa	Associate Professor	Tenured	100%	D	Accounting
Schweitzer, Linda	Full Professor	Tenured	100%	D	Management
Sears, Gregory	Associate Professor	Tenured	100%	D	Management
Smart, Robert	Associate Professor, Teaching Stream	Tenured	100%	No	Management
Sur, Sujit	Associate Professor	Tenured	100%	D	Management
Tanev, Stoyan	Associate Professor	Tenured	100%	D	Entrepreneurship
Wang, Yun (Dora)	Assistant Professor	Not Tenured	100%	CD	Marketing
Westerlund, Mika	Associate Professor	Tenured	100%	D	Entrepreneurship
Yang, Yan (Nicole)	Assistant Professor, Teaching Stream	Not Tenured	100%	No	Finance
Zabolotnyuk, Yuriy	Associate Professor	Tenured	100%	D	Finance
Zyglidopoulos, Stelios	Full Professor	Tenured	100%	D	Management

*D=full privileges; M=full privileges at master's level only; CD=co-supervision privileges at doctoral level, full privileges at master's level; CDM=co-supervision privileges only at both doctoral and master's level; CM=co-supervision privileges at master's level, no privileges at doctoral level

In the proposed program, 22 of the required courses are already offered in the B.Com program and these courses will be open to both B.Com and B.Acc students. Fourteen of the required courses are specialized accounting courses. These 14 accounting courses in the B.Acc. will also be optional courses in the existing B.Com. accounting concentration. Two of the 14 accounting courses are established and are currently offered in the concentration. Seven of the 14 courses are being introduced as new courses because of the curriculum redesign, reflecting changes in the CPA competency map, and will replace existing accounting courses that are currently on offer in the B.Com. program and are being removed. Five of the 14 courses are new undergraduate courses. Due to the restructuring of older accounting courses, the overall teaching load will not change significantly and can be absorbed by the current faculty and contract instructors.

D.2. Faculty research funding.

Table D.2: Operating Research Funding by Source and Year

Year	Source						Totals
	Tri-Council	Internal	Canadian	US	International	Other (Foundations, Not-for- profits, businesses: Cdn, US & Int'l)	
2021	\$930,224	\$197,780	\$77,527			\$429,913	\$1,635,444
2022	\$476,561	\$567,112	\$6,108,510			\$404,550	\$7,556,733
2023	\$930,843	\$55,496	\$371,320		\$28,434	\$985,296	\$2,371,389
2024	\$782,936	\$99,842	\$80,000			\$342,750	\$1,305,528
2025	\$93,700	\$25,000	\$0		\$6,000	\$1,996,583	\$2,121,283
TOTALS	\$3,214,264	\$945,230	\$6,637,357	\$0	\$34,434	\$4,159,092	\$14,990,377

The faculty in the accounting area have published 40 articles in peer-reviewed journals and 85 peer-reviewed intellectual contributions outside of articles (presentations, proceedings, books, etc.) over the last five years (2019/20-2023/24). 67% of the accounting faculty have contributed to the portfolio of intellectual contributions in the last five years.

Building on the expertise and experience of the accounting group and Sprott faculty, the Professional Accounting Research Group (PARG) is a research group at Sprott, currently supported by a dozen members, including Sprott PhD candidates in accounting. With a proper balance between theory and practice, PARG supports the Sprott School of Business' mission by facilitating a cross-disciplinary research environment to enable faculty and students to carry out leading-edge research on complex issues, and by working in partnership with organizations and institutions.

D.3. Distribution of thesis supervision.

Not applicable to this program as it is course-based.

D.4. Current teaching assignments

Faculty members who will teach in the B.Acc. program currently teach a range of required and elective courses in both undergraduate and graduate programs including the Bachelor of Commerce, Bachelor of International Business, MBA, Master of Accounting, MSc Management & PhD Management courses. The distribution of the courses are presented in Table D.4, Appendix 5.

D.5. Contract instructors

Contract instructors at Sprott typically teach for the University on a part-time basis and hold full-time employment outside the University. Employing contract instructors ensures that we have the right mix

of academics and practicing professionals teaching in our programs. We will use contract instructors in the B.Acc. once we have exhausted all resources with our full-time faculty. Any contract instructor hired to teach accounting courses in this program will hold CPA designation and be professionally qualified as per AACSB requirements. AACSB standards require that at least 60% of all courses within the accounting discipline be taught by Participating faculty members, and at least 40% to be taught by Scholarly Academics.² Sprott is currently meeting the requirements within the accounting discipline (77% taught by Participating and 47% taught by Scholarly Academics) and will ensure that the number of courses taught by contract instructors will fall within our requirements.

E. Program Admission and Enrolment

E.1. Admissions requirements

Admission requirements for the B.Acc. include a direct entry pathway from high school to the first year of the program, in addition to options for advanced standing admission for students wishing to transfer into the B.Acc. from a non-business program, as well as a pathway for students wishing to transfer into the B.Acc. from a different undergraduate business program.

Admission into the first year of the program is based on completion of the Ontario Secondary School Diploma (or equivalent) including six 4U or M courses that must include English, Advanced Functions, and either Calculus and Vector or Mathematics of Data Management.

Students applying for advanced standing admission may be assessed under one of three options. These options present students with the opportunity to apply based on their overall academic achievement and/or based on their demonstrated potential for success in the B.Acc., creating a more accessible and inclusive process for students to be assessed for admission. As such, students may apply under one of the following pathway options:

- Option 1 - applicants must present with an overall CGPA of 9.00 (B+) or higher.
- Option 2 - applicants must demonstrate their eligibility for studies in business based on their completion of a minimum of three out of six B.Acc. Major courses (BUSI 1001, BUSI 1002, ECON 1001, ECON 1002, BUSI 1800, and MATH 1009, or equivalent) with no individual grade below a C+ and with a Major CGPA of 7.00 (B-) or higher.
- Option 3 - internal applicants already enrolled in a Sprott program (B.Com. or B.I.B.) must present with the minimum CGPAs required for progression in the B.Acc., consistent with the Academic Continuation Evaluation requirements of the program.

Detailed admission requirements as per the Undergraduate Calendar are noted in Appendix 3.

E.2. Class sizes and course and program capacity

² <https://www.aacsb.edu/-/media/documents/accreditation/2020-aacsb-business-accreditation-standards-june-2023.pdf>

Class size for the B.Acc. courses will follow our average class size for our other undergraduate programs at Sprott:

1000 level courses: enrolment capacity approximately 90-300 students

2000 level courses: enrolment capacity approximately 80 students

3000 level courses: enrolment capacity approximately 60 students

4000 level courses: enrolment capacity approximately 50 students

There is no maximum program capacity for the program. Over the first two years we expect most program enrolments to come from our current students enrolled in the B.Com. Accounting Concentration (currently 538 enrolled), therefore course enrolments in the joint B.Com./B.Acc. core courses will not be greatly impacted. Once the projected program maturity is reached in two years, we would explore offering additional sections to the required non-accounting courses in the program, if required.

E.3. Projected enrolment

It is expected that the initial enrolment at inception will be 100 students. We expect a steady increase in enrolment in year two, reaching program maturity and a steady state of enrolment with 500 students by the program's third year. It is projected that enrolment will remain steady at a total enrolment of 500 students in the following years.

As with all undergraduate programs at Sprott, we will continue to support the recruitment efforts at Carleton in reaching a diverse pool of applicants.

F. Student Experience and Satisfaction

F.1. Student orientation, advising, and mentoring

As Sprott students, B.Acc. students will be supported by the Sprott Undergraduate Student Services team, which includes direct contact with a team of twelve professional staff members including transition, academic, and career advisors that will coach and help guide students through the different stages of their student experience.

The Sprott student success roadmap will further frame student success activities, services, and the communication plans for B.Acc. students. Each year of the program has an overarching theme rooted in the student life cycle. Starting with an orientation program, the theme of connection will enable first year B.Acc. students to build relationships with their peers, support services, faculty, and the Sprott community as a whole. In second year, the theme of Exploration sets the stage for students to further explore all functional areas of business, diving deeper into accounting, while also considering different experiential learning and career options through a series of sophomore orientation and proactive advising interventions. In third-year, B.Acc. students will be empowered to bring the classroom into applied real-world settings through co-op, internships, and experiential learning opportunities hosted in and outside of the classroom. The impact of these experiences will frame the theme of their fourth year in the program, as students will be engaged in opportunities to give back to their communities at Sprott

and beyond through mentorship activities and through experiential learning opportunities focusing on their academic, personal, and professional goals.

B.Acc. students will also access the services offered by the Sprott Undergraduate Resource Centre including peer coaching, study halls, designated library research drop-in hours, workshops, etc. B.Acc. students will have access to a vibrant student community at Sprott that includes over twelve student clubs and societies, and many social and extracurricular activities centered around the student experience of business students such as case competitions and community service learning.

The communications plan for B.Acc. students begins prior to their arrival on campus, with direct outreach for transition advising. B.Acc. students will receive a weekly newsletter from Sprott including key academic and career updates as well as resources applicable to that week in the term. Students will also receive strategic communications based on their progression and academic standing (CGPAs). These proactive and early-warning advising interventions are designed to connect students with an advisor and with additional support. Available supports look at the student experience holistically and range from academic, wellness and mental health, financial, and social/student life supports, etc. B.Acc. students will access various websites that support their student experience including a page for first year students, registration guides, degree planning, services, etc.

Sprott faculty and staff are well equipped to support students and diverse student experiences through a range of formal training programs offered in-house and at the University through certificate programs. Some examples include the Student Support Certificate which includes intercultural fluency, equity diversity and inclusion, and indigenous cultural awareness as core competencies. Additionally, many of our staff and faculty have completed or will be completing the Kinàmàgawin Indigenous Learning Certificate which includes sessions on anti-indigenous racism in Canada and indigenous student experiences. Furthermore, the Sprott EDI Committee brings Sprott faculty, staff, and students together to support EDI initiatives at the school and connect our community with relevant resources. Sprott staff meetings, our yearly retreat, and onboarding orientations offer relevant professional development opportunities for both staff and faculty, including sessions on supporting students in crisis and academic resilience. Faculty and contract instructors also have access to teaching and learning support through Teaching and Learning Services, which offers a wide range of services with a focus on creating inclusive course environments. Our faculty and instructors have access to a Sprott teaching mentor who is currently an accounting faculty member.

F.2. Career paths of graduates

The B.Acc. was designed in consultation with industry professionals at an important time of change in the field with the release of the CPA Leading the Way: Competency Map 2.0. This process has led to the creation of an advisory board of accounting firms to consult on employer and industry demands and support the proposed topics and competencies within the B.Acc. curriculum. These firms will continue to meet annually to advise on curriculum development as it relates to industry demands, creating a clear pathway and synergies for B.Acc. graduates transitioning directly into the industry post-graduation. The B.Acc. will cover the required competencies as noted in the updated competency map, in addition to

advanced topics in all areas of accounting including financial reporting, taxation, assurance, and management accounting, incorporating non-routine and complex topics that are important to employers in the field of accounting. To date, the advisory board has strongly advised us of the need for a capstone course to prepare learners for entering the workforce full-time, resulting in the development of BUSI 4020 (Accounting Capstone). This will be a simulation driven course that will provide students with direct hands-on experience across the field, incorporating technical skills and decision making. This direct connection to industry will give B.Acc. graduates a competitive edge when applying for industry jobs in the field of Accounting.

The B.Acc. will support a seamless transition to the Master of Accounting program (M.Acc.) or to the CPA Professional Education Program (CPA PEP) for students wishing to obtain their CPA designation.

B.Acc. students will also be well positioned for a global career in public sector finance and accounting through the existing partnership between Sprott and the Chartered Institute of Public Finance and Accounting (CIPFA) which recognizes several accounting courses currently taught by Sprott towards the CIPFA designation. Once B.Acc. courses are rolled out, additional credits will be explored to present an expedited pathway for B.Acc. students to receive this professional designation.

On the Government of Ontario website the following occupations were searched in Ontario's labour market:³

- Financial Auditors and accountants (NOC 11100): the site indicates that there will be 9,400 projected job openings between 2024-2028, 38% new and 62% replacement. In 2023, 8214 jobs were posted in this area.
- Senior managers-financial, communications and other business services (NOC 00012): the site indicates that the occupational outlook is "very good" noting 31,100 projected job openings from 2024-2028, 24% new and 76% replacement. In 2023, 3463 jobs were posted in this area.

G. Resources

G.1. Support and technical staff

The program will be supported by the Sprott Undergraduate Student Services Office which includes a Manager of Undergraduate Programs, Undergraduate Program Advisors, and Business Career Coordinators and will oversee activities including, but not limited to, academic issues, career development, course enrolment and program progression, employability passport administration, experiential learning supports, and student success initiatives. There are no requirements for additional staff.

G.2. Space

There are no additional space requirements. Faculty and staff are currently located in the Nicol Building. Characterized by flexible classrooms and collaboration spaces, the Nicol Building is tailored to holistic

³ <https://www.ontario.ca/page/labour-market>

learning with dynamic areas dedicated to student engagement and experiential initiatives like the Sprott Student Tax Clinics and Sprott Student Consulting Group. It further amplifies experiential learning and fostering of innovation with the main-floor Innovation Hub, a cross-faculty centre dedicated to nurturing student entrepreneurship across campus.

a. Laboratory facilities (as applicable)

Students will have access to Bloomberg terminals in the Nicol building.

b. Unit/program and affiliated research facilities (as applicable)

Not applicable.

c. University and unit/program computer facilities and computing resources (as applicable)

It is expected that most students will have a computer or access to one. For those who do not, the existing computing facilities available to Sprott students will be sufficient.

G.3. Library Resources

An analysis of Carleton University Library's information resources and services in support of the Bachelor of Accounting program demonstrates that the Library does not require any additional funds to support it. The Library's collection includes specific resources to support the proposed program.

The Report from the Library is included as **Appendix 4** of the self-study.

The Library report is prepared by the librarian or subject specialist responsible for the subject area(s) covered by the program, using a common template developed from guidelines established by the Ontario Council of University Libraries. The main purpose of the report is to specify whether any new resources or services are necessary in order to support the program, for example, whether the Library needs to purchase new books or subscribe to new journals or electronic resources.

The librarians and subject specialists preparing the reports rely on their own professional experience with collecting resources in the subject areas in order to make assessments about whether there are gaps in the collection that need to be filled in order to provide the appropriate teaching and research support for new, modified, or reviewed programs. They consult various sources for information about published resources in the subject area, including the database maintained by the Library's main monographs vendor, publishers' lists and websites, handbooks and guides to the literature, the library collections of universities that offer the program, various specialized sites relevant to the subject from professional societies and organizations, as well as basic information available in tools such as Google Scholar or generally on the web. They also generally consult faculty members (e.g., the Library representative or the department chair) to discuss their assessment of the strengths and gaps. The Library makes a clear distinction between those resources which are essential to the program and those which are simply "nice to have." Generally speaking, the reports list only the essential resources, with

costing obtained from the vendors or agents from which the Library would obtain the materials: each item is listed and costed individually and the total amount is recorded in the report.

The report also provides context by providing information about the following, when possible or applicable: percentage of top-ranked journals which the Library subscribes to in the subject area(s); how much funds have been spent in the past fiscal year on e-resources, journals, and printed books in support of the subjects covered by the program; how much funds have been spent in the past 8 years on printed monographs for the program; specialized collections in archives, maps, data, and government information; instruction, teaching, and practicums carried out by Library staff in the classroom or in the Library; highlights from the Library website (e.g., links for subject and course guides and to online tutorials); research partnerships between the Library and the department or program; research consultations; help desk visits; and selected detailed statistical information about the Library.

H. Development of the Self-Study

This self-study was prepared by the Associate Dean, Student Success and Recruitment, Undergraduate Programs, Rebecca Renfro. Significant input was provided by other members of the accounting teaching area at the Sprott School of Business as well as by Howard Nemiroff, Dean; Emily Gray, Associate Dean, Student Success and Recruitment, Professional Graduate Programs; Maria Walt, Manager Undergraduate Programs; and Emily Mantha, Manager of Strategy and Quality. The program was developed with the support of the Accounting Teaching Area at Sprott, and in alignment with the newly developed CPA competency map, while also incorporating feedback from our employers of Sprott accounting interns and graduates. The program structure and curriculum were reviewed and edited by the Undergraduate Curriculum Review Committee (CRC). Once approved by CRC, it was then reviewed and approved by Sprott Faculty Board.

Appendix 1

Proposed program structure and calendar language for the Bachelor of Accounting.

Bachelor of Accounting Honours (20.0 credits)

A: Credits included in the Major CGPA (18.5 credits)

1. 1.5 credits in:
 - BUSI 1011 [0.5] Financial Accounting for Business Students
 - BUSI 1401 [0.5] Foundations of Information Systems
 - BUSI 1800 [0.5] Introduction to Business
2. 1.0 credit in:
 - ECON 1001 [0.5] Introduction to Microeconomics
 - ECON 1002 [0.5] Introduction to Macroeconomics
3. 0.5 credit in:
 - MATH 1009 [0.5] Mathematics for Business
4. 1.0 credit in:
 - PSYC 1002 [0.5] Introduction to Psychology II
 - SOCI 1005 [0.5] Sociology for Bachelor of Commerce Students
5. 5.0 credits in:
 - BUSI 2011 [0.5] Intermediate Financial Reporting 1
 - BUSI 2018 [0.5] Managerial Accounting for Business Students
 - BUSI 2101 [0.5] Organizational Behaviour
 - BUSI 2208 [0.5] Introduction to Marketing
 - BUSI 2301 [0.5] Introduction to Supply and Operations Management
 - BUSI 2401 [0.5] Introduction to Data Analytics
 - BUSI 2501 [0.5] Business Finance
 - BUSI 2601 [0.5] Business Law
 - BUSI 2701 [0.5] Fundamentals of International Business
 - BUSI 2800 [0.5] Entrepreneurship
6. 0.5 credits in:
 - STAT 2601 [0.5] Business Statistics
7. 4.0 credits in:
 - BUSI 3011 [0.5] Intermediate Financial Reporting 2
 - BUSI 3013 [0.25] Professionalism and Perspectives in Accounting
 - BUSI 3014 [0.25] Exploring Sustainability in Accounting
 - BUSI 3015 [0.5] Taxation Concepts
 - BUSI 3017 [0.5] Auditing Theory
 - BUSI 3018 [0.5] Cost Management and Decision Making
 - BUSI 3040 [0.5] Data Analytics and Information Systems for Accounting
 - BUSI 3102 [0.5] Introduction to Human Resource Management

	BUSI 3309 [0.5]	Project Management
8. 2.5 credits in:

BUSI 4003 [0.5]	Accounting: Relevance and Influence
BUSI 4011 [0.5]	Advanced Financial Reporting
BUSI 4015 [0.5]	Advanced Taxation Concepts
BUSI 4017 [0.5]	Advanced Auditing
BUSI 4018 [0.5]	Advanced Cost Management and Decision Making
 9. 1.5 credits in:

BUSI 4020 [0.5]	Accounting Capstone
BUSI 4601 [0.5]	Business Ethics
BUSI 4609 [0.5]	Strategic Management
 10. 1.0 credit in: BUSI at the 4000-level
 11. 0.0 credits in: Business Career Preparation Requirement

BUSI 1995 [0.0]	Employability Passport I
BUSI 3995 [0.0]	Employability Passport II
- B. Credits not included in the Major CGPA (1.5 credits)
12. 1.5 credits in free electives

Notes:

1. BUSI 4020, BUSI 4601, and BUSI 4609 in Item 9 above must be taken at the Sprott School of Business.
2. The following courses cannot be used as free electives toward the B.Acc. degree: ESLA 1300, ESLA 1500, and any 0000-level course such as MATH 0009 and MATH 0107.
3. The 4000-level credit in Item 10 above must be taken at the Sprott School of Business.
4. Students require completion of BUSI 1800 and BUSI 2800 to be eligible for registration in BUSI 3102 and BUSI 3309.
5. Students require completion of BUSI 1995 to be eligible for registration in BUSI 3309. BUSI 3995 must be completed as part of the degree requirements prior to graduation from the Bachelor of Accounting.

Appendix 2

Calendar entries for new and existing courses for the Bachelor of Accounting.

BUSI 1011 [0.5 credit]

Financial Accounting for Business Students

Introduction to accounting for business organizations. The student will be introduced to the accounting process and the preparation and analysis of the balance sheet, income statement, and cash flow statement.

Precludes additional credit for BUSI 1001, BUSI 1003, and BUSI 1004.

Prerequisite(s): BUSI 1800. Restricted to B.Com., B.I.B., and B.Acc. students.

Lectures three hours a week.

BUSI 1401 [0.5 credit]

Foundations of Information Systems

This course helps student to understand the critical role of information systems in organizations and their impact on social and ethical issues. Covers fundamental tools and skills for the development and management of information systems and business analytics in organizations.

Precludes additional credit for BUSI 2400.

Lecture three hours a week.

BUSI 1800 [0.5 credit]

Introduction to Business

Introduction to contemporary businesses in a complex economy, their role in the society, their history. The various functions that come together to define a business will be examined. All forms of business communications emphasized.

Precludes additional credit for BIT 2001.

Lectures three hours and tutorial one hour a week.

ECON 1001 [0.5 credit]

Introduction to Microeconomics

An introduction to the major tools and policy problems of microeconomics. Economic analysis is applied to a variety of contemporary issues such as taxation, pollution, wage determination, poverty, market power, and international trade.

Precludes additional credit for ECON 1000 and FYSM 1003.

Lectures three hours a week, discussion groups one hour a week.

ECON 1002 [0.5 credit]

Introduction to Macroeconomics

An introduction to the major tools and policy problems of macroeconomics. Economic analysis is applied to a variety of contemporary problems such as: saving, investment and interest rates; unemployment; money and inflation; exchange rates; fiscal and monetary policy.

Precludes additional credit for ECON 1000 and FYSM 1003.
Lectures three hours a week, discussion groups one hour a week.

MATH 1009 [0.5 credit]

Mathematics for Business

An introductory course of mathematics for business. Thorough review of basic arithmetic and algebra. Elementary functions, their graphs, properties and applications in business models. Limits. Derivatives of elementary functions. Systems of linear equations/inequalities. Geometric series.

Precludes additional credit for BIT 1000, BIT 1100, BIT 1200, BUSI 1705 (no longer offered), MATH 1401/ECON 1401, MATH 1052. This course is not acceptable for (substitute) credit in any of the following degree programs: B.Math., and also B.Sc., B.C.S., B.Eng., B.I.D.

Prerequisite(s): Restricted to B.Com. and B.I.B students.

Lectures three hours a week, tutorial one hour a week.

PSYC 1002 [0.5 credit]

Introduction to Psychology II

A survey of topics associated with psychology's role as a social science, including social psychology, personality, clinical psychology, and mental health.

Precludes additional credit for PSYC 1000.

Prerequisite(s): PSYC 1001.

Lecture three hours a week.

SOCI 1005 [0.5 credit]

Sociology for Bachelor of Commerce Students

The origins of sociology, why sociology matters, and how it is practiced. Concepts such as class, race, ethnicity, gender, sexual orientation, work, organization, and social movements help students develop their sociological 'eye' for thinking critically about society and their place within it.

Precludes additional credit for SOCI 1002.

Prerequisite(s): restricted to B.Com. students.

Lecture three hours a week.

BUSI 2011 [0.5 credit]

Intermediate Financial Reporting I

Application and measurement of routine accounting transactions related primarily to asset valuation and revenue recognition.

Precludes additional credit for BUSI 2001, BUSI 2002, and BUSI 3001

Prerequisite(s): BUSI 1001, BUSI 1004, or BUSI 1011 (with a grade of C or better in each).

Lecture three hours a week.

BUSI 2018 [0.5 credit]

Managerial Accounting for Business Students

Introduction to the development and use of accounting information within a business organization for effective management including: planning, directing, motivating, and controlling activities and behaviours.

Precludes additional credit for BUSI 1002, BUSI 1003, and BUSI 1005.

Prerequisite(s): BUSI 1004 or BUSI 1011. Restricted to B.Com., B.I.B., and B.Acc. students.

Lecture three hours a week.

BUSI 2101 [0.5 credit]

Organizational Behaviour

Models of individual and small group behaviour in organizations. Topics include motivation, communication, job design, leadership and group dynamics to provide systematic explanations of employee and managerial behaviour in organizations.

Precludes additional credit for BUSI 2121, BUSI 2702, BUSI 3602.

Prerequisite(s): second-year standing. Restricted to B.Com. students.

Lectures three hours, and tutorial one and a half hours a week.

BUSI 2208 [0.5 credit]

Introduction to Marketing

Overview of the marketing function within the firm. Introduction to key marketing concepts and principles; business environment analysis, strategic decision making (segmentation, targeting, positioning), marketing mix planning (product, price, place promotion). Analysis of marketing problems using cases and major project.

Includes: Experiential Learning Activity

Precludes additional credit for BUSI 2204.

Prerequisite(s): BUSI 1004, ECON 1001 and ECON 1002 (or ECON 1000), and one of BUSI 1701, PSYC 1002, SOCI 1005.

Lecture three hours a week.

BUSI 2301 [0.5 credit]

Introduction to Supply and Operations Management

Concepts, models, and managerial issues in planning, designing, operating and controlling systems across supply chains for the provision of goods and services. Emphasis on basic ideas and tools.

Precludes additional credit for BUSI 3300 (no longer offered).

Prerequisite(s): second-year standing. Restricted to selected Sprott programs.

Lecture three hours a week.

BUSI 2401 [0.5 credit]

Introduction to Data Analytics

This course prepares students to gather, manipulate, and clean data from a variety of sources within a programming environment. Students will be introduced to visual data exploration and the deployment of data-driven visual storytelling. Topics include: APIs, Data Science Programming, SQL, Relational/NoSQL databases, data visualization.

Prerequisite(s): BUSI 1401.
Lecture three hours a week.

BUSI 2501 [0.5 credit]

Business Finance

Basic issues and practices in finance. Survey of business firms' financing, investment, and payout decisions. Emphasis on understanding the principles, resources, and trade-offs in the financial area of business.

Precludes additional credit for BUSI 2503, BUSI 2504 (no longer offered).

Prerequisite(s): BUSI 1005, and ECON 1001 and ECON 1002 (or ECOR 3800). Restricted to selected Sprott programs.

Lecture three hours and optional tutorial.

BUSI 2601 [0.5 credit]

Business Law

The legal system and legal ordering as they affect those engaged in business activities. Emphasis on the law of tort, law of contract, agency and bailment, business associations (partnerships/proprietorships/corporations) and real estate.

Lecture three hours a week.

BUSI 2701 [0.5 credit]

Fundamentals of International Business

Introduction to the context and operation of international business. Topics include international trade theory, trade agreements and blocs, international finance, global marketing, international human resource management and global strategy.

Precludes additional credit for BUSI 1701, BUSI 2703.

Prerequisite(s): BUSI 1800.

Lecture three hours a week.

BUSI 2800 [0.5 credit]

Entrepreneurship

Overview of the basics of entrepreneurship, with emphasis on idea generation and identification, team building, business models, initial strategies and feasibility. A number of organization types will be studied.

Prerequisite(s): Second-year standing.

Lecture three hours a week.

STAT 2601 [0.5 credit]

Business Statistics

Introduction to statistical computing, descriptive statistics, probability concepts, interval estimation and hypothesis testing, categorical data analysis. Introduction to simple regression, multiple regression, and

time series. Emphasis on the development of an ability to interpret results of statistical analyses with applications from business.

Includes: Experiential Learning Activity

Precludes additional credit for BIT 2000, BIT 2009, BIT 2100 (no longer offered), BIT 2300 (no longer offered), ECON 2201 (no longer offered), ECON 2210, ENST 2006, GEOG 2006, STAT 2507, STAT 2606 (no longer offered) and STAT 3502.

Prerequisite(s): MATH 1009. Restricted to B.Com. and B.I.B. students.

Lectures three hours a week and laboratory one hour a week.

BUSI 3011 [0.5 credit]

Intermediate Financial Reporting II

Application and measurement of routine accounting transactions related primarily to investments, liabilities and shareholders' equity.

Precludes additional credit for BUSI 2001, BUSI 2002, and BUSI 3001.

Prerequisite(s): BUSI 2011, and BUSI 2501 or BUSI 2503 (with a grade of C or better in each).

Lecture three hours a week.

BUSI 3013 [0.25 credit]

Professionalism and Perspectives in Accounting

Theories of professions, professionalism, Indigenous views and equity, diversity and inclusion (EDI) and application to accountancy.

Prerequisite(s): BUSI 2011 (with a grade of C- or better).

Lecture three hours a week.

BUSI 3014 [0.25 credit]

Exploring Sustainability in Accounting

Exploration of the application of how sustainability (including Environmental, Social and Governance) plays a role in accounting.

Prerequisite(s): BUSI 2011 (with a grade of C- or better).

Lecture three hours a week.

BUSI 3015 [0.5 credit]

Taxation Concepts

Application and measurement of routine taxation transactions.

Precludes additional credit for BUSI 2005 and BUSI 3005.

Prerequisite(s): third-year standing, and BUSI 1001, BUSI 1004, or BUSI 1011 (with a grade of C- or better).

Lecture three hours a week.

BUSI 3017 [0.5 credit]

Auditing Theory

Auditing theory, methodology and application.

Precludes additional credit for BUSI 4007.

Prerequisite(s): BUSI 2001 or 2011.

Lecture three hours a week.

BUSI 3018 [0.5 credit]

Cost Management and Decision Making

Application and measurement of accounting information for cost control and performance evaluation.

Precludes additional credit for BUSI 3008 and BUSI 4008.

Prerequisite(s): BUSI 1002, BUSI 1005, BUSI 2008, or BUSI 2018, and BUSI 2501 or BUSI 2503 (with a grade of C- or better in each).

Lecture three hours a week.

BUSI 3040 [0.5 credit]

Data Analytics and Information Systems for Accounting

Data analysis in accounting, working with and making sense of big data using various data analysis tools.

Specific topics include; data collection, cleaning, analyzing, visualization, and decision making in different areas of accounting.

Includes: Experiential Learning Activity

Prerequisite(s): 1. BUSI 1401 (or BUSI 2400), 2400, and BUSI 3017 or BUSI 3007 with a grade of C- or higher in each or 2. Enrolment in the Post-Baccalaureate Diploma in Accounting, and BUSI 3017 or BUSI 3007 with a grade of C- or higher in either.

Lecture three hours a week.

BUSI 3102 [0.5 credit]

Introduction to Human Resources Management

Human Resource Management function in large formal organizations. Topics include human resources planning, recruitment, selection, performance evaluation, career development and training, compensation and benefits and the role of the professional personnel manager.

Prerequisite(s): second-year standing, and one of BUSI 2101, BUSI 2121, BUSI 2702, BUSI 3602, PSYC 2801.

Lectures three hours a week.

BUSI 3309 [0.5 credit]

Project Management

Identification, selection, initiation, and organization of projects; risk assessment; project scheduling, performance monitoring and control, and termination. Emphases on foundations, principles and supporting techniques.

Prerequisite(s): third-year standing, and STAT 2601 or STAT 2606.

Lecture three hours a week.

BUSI 4003 [0.5 credit]

Accounting: Relevance and Influence

This course focuses on the evolution and impact of accounting theory on decision making and standard setting. Students will develop an ability to critically evaluate current and proposed accounting practices and their impact on decision making within a broad conceptual framework.

Precludes additional credit for BUSI 4000 (no longer offered).

Prerequisite(s): BUSI 2002 and BUSI 2501 and STAT 2601 with a grade of C- or higher in each.

Lectures three hours a week.

BUSI 4011 [0.5 credit]

Advanced Financial Reporting

Application and measurement of non-routine accounting transactions.

Precludes additional credit for BUSI 2001, BUSI 2002, and BUSI 3001.

Prerequisite(s): BUSI 3011 (with a grade of C- or higher).

Lectures three hours a week.

BUSI 4015 [0.5 credit]

Advanced Taxation Concepts

Application and measurement of non-routine or complex taxation transactions.

Precludes additional credit for BUSI 2005, BUSI 3005, and BUSI 4005.

Prerequisite(s): BUSI 3015 (with a grade of C+ or higher).

Lectures three hours a week.

BUSI 4017 [0.5 credit]

Advanced Auditing

Advanced application of audit methodology and assurance engagements.

Prerequisite(s): BUSI 3007 or BUSI 3017 (with a grade of C+ or higher)

Lectures three hours a week.

BUSI 4018 [0.5 credit]

Advanced Cost Management and Decision Making

Strategic uses of cost information, budgeting and performance evaluation systems in managerial planning and control.

Precludes additional credit for BUSI 3008 and BUSI 4008.

Prerequisite(s): BUSI 3018 (with a grade of C+ or higher).

Lectures three hours a week.

BUSI 4020 [0.5 credit]

Advanced Auditing

Integration of a variety of accounting disciplines. Experiential learning through cases and/or simulations that integrates financial reporting, managerial accounting, taxation concepts, assurance concepts, and data analytics. Accounting, taxation, and/or data analytics software may be used to enhance practical application of theoretical concepts.

Prerequisite(s): BUSI 3011, BUSI 3015, BUSI 3017, BUSI 3018, and BUSI 3040

(with a grade of C- or better in each).

Lectures three hours a week.

BUSI 4601 [0.5 credit]

Business Ethics

Use of ethical reasoning to analyze business decisions. The ethical content of these decisions. The role of ethics in business situations. Practice in ethical reasoning. Major ethical systems.

Precludes additional credit for BUSI 4705.

Prerequisite(s): fourth-year standing B.Com or B.Acc. Note that B.Com. concentration in International Business students require BUSI 4705.

Lectures three hours a week.

BUSI 4609 [0.5 credit]

Strategic Management

Analysis and evaluation of the organization's corporate and business strategies; integration and synthesis of knowledge acquired in the program by application of acquired functional skills to strategic decision making.

Precludes additional credit for BUSI 3629, BUSI 4709.

Prerequisite(s): At the time of registration students must have fourth-year standing in B.Com. or B.Acc., as well as successful completion of all 2000- and 3000- level courses in the Major requirement, normally completed within the last 10 years.

Lectures three hours a week.

BUSI 1995 [0.0 credit]

Employability Passport I

An introduction to the knowledge and tools required for a career in Business.

Includes: Experiential Learning Activity

Prerequisite(s): Restricted to students registered in B.Com., B.I.B., or B.Acc.

Participation in employability events and initiatives throughout the year.

BUSI 3995 [0.0 credit]

Employability Passport II

An advanced course in the knowledge and tools required for a career in Business.

Includes: Experiential Learning Activity

Prerequisite(s): BUSI 1995

Participation in employability events and initiatives throughout the year.

Appendix 3

Calendar entry for Admissions Regulation for the Bachelor of Accounting.

Admissions Information

Admission requirements are based on the Ontario High School System. Prospective students can view the admission requirements through the Admissions website at admissions.carleton.ca. The overall average required for admission is determined each year on a program-by-program basis. Holding the minimum admission requirements only establishes eligibility for consideration; higher averages are required for admission to programs for which the demand for places by qualified applicants exceeds the number of places available. All programs have limited enrolment and admission is not guaranteed. Some programs may also require specific course prerequisites and prerequisite averages and/or supplementary admission portfolios. Consult admissions.carleton.ca for further details.

Note: If a course is listed as recommended, it is not mandatory for admission. Students who do not follow the recommendations will not be disadvantaged in the admission process.

Degree

- Bachelor of Accounting (B.Acc.) (Honours)

Admission Requirements

First Year

Bachelor of Accounting (B.Acc.) (Honours)

The Ontario Secondary School Diploma (OSSD) or equivalent including a minimum of six 4U or M courses. The six 4U or M courses must include English (or anglais), Advanced Functions, and either Calculus and Vectors or Mathematics of Data Management. Note that Calculus and Vectors is preferred.

Applicants submitting an English language test to satisfy the requirements of the English Language Proficiency section of this Calendar may use that test to also satisfy the 4U English prerequisite requirement.

Advanced Standing

Bachelor of Accounting (B.Acc.) (Honours)

Applications for admission to the second or subsequent years will be assessed on their merits. Applicants must present an overall CGPA of 9.00 (B+) or higher.

Students may also be assessed for admission to second and subsequent years if they present with a minimum of 3 out of the following 6 courses (or equivalent): BUSI 1001, BUSI 1002, ECON 1001, ECON 1002, BUSI 1800, and MATH 1009 with no individual grade below C + and with a Major CGPA of 7.00 or higher. Note that MATH 1007, MATH 1004, MATH 1052, or ECON 1401 are acceptable for transfer in lieu of MATH 1009. Advanced standing will be granted only for those courses that are determined to be appropriate

Applications by B.Com. (Honours) and B.I.B. (Honours) students for admission to the second or subsequent years of B.Acc. (Honours) will be assessed on their merits. Students must present a Major CGPA and an Overall CGPA consistent with the Academic Continuation Evaluation requirements for B.Acc. (Honours) students.

Advanced standing will be granted for those courses determined to be appropriate.



Institutional Quality Assurance Process

Major Modifications Not Requiring a Library Report

Date: March 11, 2024

From: George Duimovich, Collections Librarian

To: Christina Noja, Director, Office of Academic Programs and Strategic Initiatives

cc Amber Lannon, University Librarian
Sarah Simpkin, Associate University Librarian, Academic Services
Alana Skwarok, Acting Head, Collections & Assessment
Sally Sax, Head, Electronic Resources & Acquisitions
Joel Rivard, Head, Research Support Services

Recommendation

After review of Carleton University Library's information resources and services, no additional Library resources are required and so no report from the Library is necessary for the QA process for the major modifications of the following programs:

- Bachelor of Accounting Honours

This is a formal notification for your records.

Appendix 5
Table D.4

Table D.4: Distribution of Teaching Assignments

Faculty Name	Courses Taught		
	2024-25	2023-24	2022-23
Al Guindy, Mohamed	FINA5522Z - Financial Technology 0.25	BUSI3502A – Investments 0.50 BUSI5906P - Special Topics 0.25 FINA5501A - Financial Management 0.25 FINA5501B - Financial Management 0.25 BUSI5906C - Special Topics 0.25	BUSI2504A - Essentials of Business Finance 0.50 BUSI5906P - Special Topics 0.25
Anderson, Troy	BUSI2101A - Organizational Behaviour 0.50 BUSI4111A - Training and Development 0.50 BUSI4117A - Creative Thinking 0.50 BUSI4117C - Creative Thinking 0.50 BUSI4111A - Training and Development 0.50 BUSI4117A - Creative Thinking 0.50 BUSI4117C - Creative Thinking 0.50		BUSI2101A - Organizational Behaviour 0.50 BUSI4111A - Training and Development 0.50 BUSI4117A - Creative Thinking 0.50 BUSI4117C - Creative Thinking 0.50 BUSI2101B - Organizational Behaviour 0.50 BUSI4111A - Training and Development 0.50 BUSI4117A - Creative Thinking 0.50 BUSI4117C - Creative Thinking 0.50
Bae, Jinsun	BUSI2701C - Fundamentals of Intl Business 0.50 BUSI2702A - Intro to Internat'l Management 0.50 BUSI2701E - Fundamentals of Intl Business 0.50 IBUS5701A - International Business 0.25	BUSI2701A - Fundamentals of Intl Business 0.50 BUSI2702A - Intro to Internat'l Management 0.50 BUSI2701E - Fundamentals of Intl Business 0.50 BUSI2701F - Fundamentals of Intl Business 0.50 IBUS5701A - International Business 0.25 IBUS5701B - International Business 0.25	BUSI2702A - Intro to Internat'l Management 0.50 BUSI2701C - Fundamentals of Intl Business 0.50 IBUS5701A - International Business 0.25
Bailetti, Antonio	TIMG5103E - Adv Tps: Tech Innovation Mgmt 0.50 TIMG5104A - Dir Std: Tech Innovation Mgmt 0.50 TIMG5110S - Project-based Learning 0.50 TIMG5901S - M.Eng Project 1 TIMG5905S - M.Ent. Project 1 TIMG5907S - M.A.B.A. Project 1 TIMG5908S - MDTE Project 1 TIMG5909S - Master's Thesis 0	TIMG5104S - Dir Std: Tech Innovation Mgmt 0.50 TIMG5103F - Adv Tps: Tech Innovation Mgmt 0.50 TIMG5104A - Dir Std: Tech Innovation Mgmt 0.50 TIMG5901T - M.Eng Project 1 TIMG5905F - M.Ent. Project 1 TIMG5907A - M.A.B.A. Project 1 TIMG5908A - MDTE Project 1 TIMG5909T - Master's Thesis 0	TIMG5103D - Adv Tps: Tech Innovation Mgmt 0.50 TIMG5002T - Technology Entrepreneurship 0.50 TIMG5103F - Adv Tps: Tech Innovation Mgmt 0.50 TIMG5103W - Adv Tps: Tech Innovation Mgmt 0.50 TIMG5104F - Dir Std: Tech Innovation Mgmt 0.50 TIMG5201A - Technology and Wealth 0.50

	TIMG5104A - Dir Std: Tech Innovation Mgmt 0.50 TIMG5110A - Project-based Learning 0.50 TIMG5901A - M.Eng Project 1 TIMG5905F - M.Ent. Project 1 TIMG5907A - M.A.B.A. Project 1 TIMG5908A - MDTE Project 1 TIMG5909T - Master's Thesis 0 TIMG5104A - Dir Std: Tech Innovation Mgmt 0.50 TIMG5901A - M.Eng Project 1 TIMG5905W - M.Ent. Project 1 TIMG5907A - M.A.B.A. Project 1 TIMG5908A - MDTE Project 1 TIMG5909T - Master's Thesis 0	TIMG5104A - Dir Std: Tech Innovation Mgmt 0.50 TIMG5201A - Technology and Wealth 0.50 TIMG5203A - Cross-Border Biz & Dig Innov 0.50 TIMG5901T - M.Eng Project 1 TIMG5905W - M.Ent. Project 1 TIMG5907A - M.A.B.A. Project 1 TIMG5908A - MDTE Project 0 TIMG5909T - Master's Thesis 0	
Bailetti, Eduardo Carlos		ECMP5003B – Entrepreneurship 0.50 TIMG5002A - Technology Entrepreneurship 0.50 TIMG5002B - Technology Entrepreneurship 0.50 ECMP5003C – Entrepreneurship 0.50 ECMP5003D – Entrepreneurship 0.50 TIMG5002A - Technology Entrepreneurship 0.50	TIMG5002T - Technology Entrepreneurship 0.50
Bajwa, Jasdeep	ACCT5121A - Advanced Concepts II 0.50 ACCT5121B - Advanced Concepts II 0.50 BUSI4008R - Mgment Control Systems 0.50 ACCT5121P - Advanced Concepts II 0.50 BUSI1004G - Fin. Acctng for Busi. Students 0.50 BUSI4008A - Mgment Control Systems 0.50	BUSI4008R - Mgment Control Systems 0.50 BUSI1004F - Fin. Acctng for Busi. Students 0.50 BUSI1004H - Fin. Acctng for Busi. Students 0.50 BUSI4008A - Mgment Control Systems 0.50	
Becker, Hilary	ACCT5012Q - Performance Measurement & Cont 0.25	ACCT5012N - Performance Measurement & Cont 0.25 ACCT5002A - Managerial Accounting 0.25 ACCT5002B - Managerial Accounting 0.25 ACCT5012P - Performance Measurement & Cont 0.25 ACCT5131A - Performance Management 0.50	ACCT5012Q - Performance Measurement & Cont 0.25 ACCT5002V - Managerial Accounting 0.25 ACCT5012P - Performance Measurement & Cont 0.25 ACCT5012Q - Performance Measurement & Cont 0.25

		ACCT5131B - Performance Management 0.50 ACCT5002P - Managerial Accounting 0.25 ACCT5012V - Performance Measurement & Cont 0.25 BUSI3629R - Corp Governance and Strat 0.50	ACCT5131A - Performance Management 0.50 ACCT5131B - Performance Management 0.50 ACCT5002P - Managerial Accounting 0.25 ACCT5012V - Performance Measurement & Cont 0.25 BUSI3629R - Corp Governance and Strat 0.50
Brouard, Francois	ACCT5122P - Issues in Taxation 0.25 BUSI5081W - Seminar in Accounting II 0.50 BUSI6001W - Seminar in Accounting II 0.50	ACCT5123A - Advanced Taxation 0.50 ACCT5123B - Advanced Taxation 0.50 ACCT5123P - Advanced Taxation 0.50 BUSI5080W - Seminar in Accounting I 0.50 BUSI6000W - Seminar in Accounting I 0.50	ACCT5123A - Advanced Taxation 0.50 ACCT5123B - Advanced Taxation 0.50 ACCT5123P - Advanced Taxation 0.50 BUSI5081W - Seminar in Accounting II 0.50 BUSI6001W - Seminar in Accounting II 0.50
Bujaki, Merridee	ACCT5125A - Advanced Assurance 0.50 ACCT5125B - Advanced Assurance 0.50 ACCT5125P - Advanced Assurance 0.50 BUSI5081W - Seminar in Accounting II 0.50 BUSI6001W - Seminar in Accounting II 0.50	ACCT5125A - Advanced Assurance 0.50 ACCT5125B - Advanced Assurance 0.50 ACCT5011A - Financial Statement Analysis 0.25 ACCT5014A - Governance and Accountability 0.25 ACCT5125P - Advanced Assurance 0.50 BUSI5080W - Seminar in Accounting I 0.50 BUSI6000W - Seminar in Accounting I 0.50	ACCT5125A - Advanced Assurance 0.50 ACCT5125B - Advanced Assurance 0.50 ACCT5125P - Advanced Assurance 0.50 BUSI5081W - Seminar in Accounting II 0.50 BUSI6001W - Seminar in Accounting II 0.50
Butler, Shannon	BUSI1002R - Management Accounting 0.50 BUSI3008R - Intermediate Mgmnt Acctng and 0.50 ACCT5002V - Managerial Accounting 0.25 BUSI1002R - Management Accounting 0.50 BUSI1005A - Managerial Acctng for Busi. St 0.50 ACCT5002V - Managerial Accounting 0.25 BUSI1002R - Management Accounting 0.50 BUSI3008R - Intermediate Mgmnt Acctng and 0.50	ACCT5012V - Performance Measurement & Cont 0.25 BUSI1002R - Management Accounting 0.50 BUSI1005A - Managerial Acctng for Busi. St 0.50 BUSI1002R - Management Accounting 0.50	BUSI1002R - Management Accounting 0.50 BUSI1005A - Managerial Acctng for Busi. St 0.50
Cai, Shaohan (Alan)	BUSI2301A - Intro to Supply Chains 0.50 BUSI3301A - Global SCM 0.50 BUSI4304A - Procurement and Contracting 0.50	BUSI2301C - Intro to Supply Chains 0.50 BUSI3301A - Global SCM 0.50 BUSI4304A - Procurement and Contracting 0.50	BUSI3301A - Global SCM 0.50 BUSI2301D - Intro to Supply Chains 0.50 BUSI4304A - Procurement and Contracting 0.50
Colbourne, Rick	BUSI5995P – Entrepreneurship 0.50 MGMT5117P - Knowledge Management 0.25 STGY5903B - Strategic Concepts 0.50		

	STGY5903P - Strategic Concepts 0.50 MGMT5117A - Knowledge Management 0.25		
Cooper, Hayley	ACCT5136A - Advanced Integration II 0.50 ACCT5136B - Advanced Integration II 0.50 ACCT5136P - Advanced Integration II 0.50 ACCT5137A - Professional Acctng Cases II 0.25 ACCT5137B - Professional Acctng Cases II 0.25 ACCT5137P - Professional Acctng Cases II 0.25 BUSI1004D - Fin. Acctng for Busi. Students 0.50 BUSI1004E - Fin. Acctng for Busi. Students 0.50 BUSI2002B - Intermediate Accounting II 0.50	ACCT5136A - Advanced Integration II 0.50 ACCT5136B - Advanced Integration II 0.50 ACCT5136P - Advanced Integration II 0.50 ACCT5137A - Professional Acctng Cases II 0.25 ACCT5137B - Professional Acctng Cases II 0.25 ACCT5137P - Professional Acctng Cases II 0.25 BUSI2002R - Intermediate Accounting II 0.50 BUSI1004B - Fin. Acctng for Busi. Students 0.50 BUSI1004D - Fin. Acctng for Busi. Students 0.50 BUSI2002B - Intermediate Accounting II 0.50	ACCT5136A - Advanced Integration II 0.50 ACCT5136B - Advanced Integration II 0.50 ACCT5136P - Advanced Integration II 0.50 ACCT5137A - Professional Acctng Cases II 0.25 ACCT5137B - Professional Acctng Cases II 0.25 BUSI2002R - Intermediate Accounting II 0.50 ACCT5137P - Professional Acctng Cases II 0.25 BUSI1004D - Fin. Acctng for Busi. Students 0.50 BUSI1004H - Fin. Acctng for Busi. Students 0.50 BUSI2002R - Intermediate Accounting II 0.50
Couchoux, Oriane	ACCT5120P - Advanced Concepts 0.50 ACCT5002P - Managerial Accounting 0.25 BUSI3007R - Auditing I 0.50 BUSI5081W - Seminar in Accounting II 0.50 BUSI6001W - Seminar in Accounting II 0.50	BUSI3007R - Auditing I 0.50	BUSI4008R - Adv Mgment Accountng & Control 0.50 BUSI3007A - Auditing I 0.50 BUSI3007B - Auditing I 0.50
Darmody, Aron	BUSI3205A - Marketing Communications 0.50 BUSI4209A - Consumer Culture Theory 0.50 BUSI5280W - Sem Mrktg I: Mgmt & Strategy 0.50 BUSI6200W - Seminar in Marketing I 0.50	BUSI3204A - Digital Marketing 0.50 BUSI3205A - Marketing Communications 0.50 BUSI3205B - Marketing Communications 0.50 BUSI4209A - Consumer Culture Theory 0.50 BUSI5281W - Sem Mrktg II: Consumer Behav 0.50 BUSI6201W - Seminar in Marketing II 0.50	BUSI3204A - Digital Marketing 0.50 BUSI3205A - Marketing Communications 0.50 BUSI3205B - Marketing Communications 0.50 BUSI4209A - Consumer Culture Theory 0.50 BUSI5280W - Sem Mrktg I: Mgmt & Strategy 0.50 BUSI6200W - Seminar in Marketing I 0.50
Deng, Qi	ITIS5431Q - Business Analytics for Manager 0.25 ITIS5432Q - Business Analytics Methods 0.25 BUSI5510Z - Data Science for Business 0.50 BUSI2401E - Intro Data Analytics 0.50 BUSI2401F - Intro Data Analytics 0.50 BUSI2401G - Intro Data Analytics 0.50	BUSI4408A - Social Analytics 0.50 BUSI5510A - Data Science for Business 0.50 ITIS5408A - Social Analytics 0.50 BUSI4407A - Business Analytics Methods 0.50	

	BUSI4407A - Business Analytics Methods 0.50		
Dionisi, Angela	BUSI4111A - Training and Development 0.50 BUSI4112A - Organizational Leadership 0.50 BUSI2101B - Organizational Behaviour 0.50 BUSI4111A - Training and Development 0.50	BUSI2101A - Organizational Behaviour 0.50 BUSI4111A - Training and Development 0.50 BUSI4112A - Organizational Leadership 0.50 BUSI2101B - Organizational Behaviour 0.50 BUSI4111A - Training and Development 0.50 BUSI4111A - Training and Development 0.50	BUSI2101A - Organizational Behaviour 0.50 BUSI4111A - Training and Development 0.50 BUSI2101B - Organizational Behaviour 0.50 BUSI4111A - Training and Development 0.50 BUSI4112B - Organizational Leadership 0.50
Doha, Ahmed	BUSI2301B - Intro to Supply Chains 0.50 BUSI2301C - Intro to Supply Chains 0.50 BUSI4301A - AI and Decision Models 0.50 BUSI4607A - Mgmt Technology & Innovation 0.50 BUSI6306F - Adv. Methods and Models 0.50	BUSI2301A - Intro to Supply Chains 0.50 BUSI2301B - Intro to Supply Chains 0.50 BUSI4331A - Industry 4.0 0.50 BUSI4607A - Mgmt Technology & Innovation 0.50	BUSI2301A - Intro to Supply Chains 0.50 BUSI2301B - Intro to Supply Chains 0.50 BUSI2301C - Intro to Supply Chains 0.50 BUSI4331A - Industry 4.0 0.50
Duxbury, Linda	MGMT5100P - Managing People&Organization 0.50 MGMT5100Q - Managing People&Organization 0.50 MGMT5120P - Fundam Lead&Manag Organi Chng 0.50	MGMT5100P - Managing People&Organization 0.50 MGMT5120P - Fundam Lead&Manag Organi Chng 0.50 MGMT5100N - Managing People&Organization 0.50	BUSI6104F - Managing the Change Process 0.50 MGMT5100A - Managing People&Organization 0.50 MGMT5100B - Managing People&Organization 0.50 MGMT5100P - Managing People&Organization 0.50 MGMT5100Q - Managing People&Organization 0.50 MGMT5120P - Fundam Lead&Manag Organi Chng 0.50
Fain, Nusa	TIMG5001A - Principles of Tech Innov Mgmt 0.50 TIMG5001B - Principles of Tech Innov Mgmt 0.50 TIMG5001C - Principles of Tech Innov Mgmt 0.50	TIMG5205A - CustomerValue Creation TechFrm 0.50 TIMG5001T - Principles of Tech Innov Mgmt 0.50 TIMG5103W - Adv Tps: Tech Innovation Mgmt 0.50	
Farivar, Samira	BUSI1401E - Foundations of Info Systems 0.50 BUSI1401G - Foundations of Info Systems 0.50 BUSI1401H - Foundations of Info Systems 0.50	BUSI1401B - Foundations of Info Systems 0.50 BUSI1401C - Foundations of Info Systems 0.50 BUSI5481W - Sem in Info Systems II 0.50 BUSI6401W - Sem in Info Systems II 0.50	BUSI1401E - Foundations of Info Systems 0.50 BUSI1401G - Foundations of Info Systems 0.50 BUSI3402A - Systems Analysis and Design 0.50
Fernando, Naomi	BUSI3007R - Auditing I 0.50 BUSI3007A - Auditing I 0.50	BUSI3007A - Auditing I 0.50 BUSI3007B - Auditing I 0.50	

	BUSI3007B - Auditing I 0.50 BUSI3040A - Data Analytics in Accounting 0.50 BUSI3005C - Taxation I 0.50 BUSI3040B - Data Analytics in Accounting 0.50	BUSI3040A - Data Analytics in Accounting 0.50 BUSI3005C - Taxation I 0.50 BUSI3007R - Auditing I 0.50 BUSI3040B - Data Analytics in Accounting 0.50	
Few, Rowland	BUSI2800C – Entrepreneurship 0.50 BUSI2800D – Entrepreneurship 0.50 BUSI3810A - Business Development 0.50 BUSI2800F – Entrepreneurship 0.50 BUSI2800G – Entrepreneurship 0.50 BUSI4810A - Practicum in Business Creation 0.50		BUSI2800A – Entrepreneurship 0.50 BUSI2800B – Entrepreneurship 0.50 BUSI3210A - Personal Selling 0.50 BUSI4810B - Practicum in Business Creation 0.50
Firoozi, Maryam	ACCT5001A - Financial Accounting 0.25 ACCT5001P - Financial Accounting 0.25 BUSI2002A - Intermediate Accounting II 0.50 BUSI1005B - Managerial Acctng for Busi. St 0.50		ACCT5001A - Financial Accounting 0.25 ACCT5001B - Financial Accounting 0.25 ACCT5001P - Financial Accounting 0.25 BUSI1004A - Fin. Acctng for Busi. Students 0.50 BUSI2002A - Intermediate Accounting II 0.50 ACCT5014A - Governance and Accountability 0.25
Fraser, Devin	ACCT5129A - Professional Accting Cases I 0.25 ACCT5129B - Professional Accting Cases I 0.25 BUSI1004A - Fin. Acctng for Busi. Students 0.50 BUSI3001R - Acc for Business Combinations 0.50 ACCT5129P - Professional Accting Cases I 0.25 BUSI1004B - Fin. Acctng for Busi. Students 0.50 BUSI1004C - Fin. Acctng for Busi. Students 0.50 BUSI3001A - Acc for Business Combinations 0.50	ACCT5129A - Professional Accting Cases I 0.25 ACCT5129B - Professional Accting Cases I 0.25 BUSI3001R - Acc for Business Combinations 0.50 ACCT5124A - Data Analytics for Prof Acct 0.25 ACCT5124P - Data Analytics for Prof Acct 0.25 BUSI3001R - Acc for Business Combinations 0.50 ACCT5129P - Professional Accting Cases I 0.25 BUSI1004E - Fin. Acctng for Busi. Students 0.50 BUSI1004G - Fin. Acctng for Busi. Students 0.50	BUSI3001R - Acc for Business Combinations 0.50 ACCT5124A - Data Analytics for Prof Acct 0.25 ACCT5124P - Data Analytics for Prof Acct 0.25 BUSI1004I - Fin. Acctng for Busi. Students 0.50 BUSI3001A - Acc for Business Combinations 0.50 ACCT5129P - Professional Accting Cases I 0.25 BUSI1004B - Fin. Acctng for Busi. Students 0.50 BUSI1004C - Fin. Acctng for Busi. Students 0.50 BUSI1004G - Fin. Acctng for Busi. Students 0.50 BUSI3001R - Acc for Business Combinations 0.50
Grant, Gerald	ITIS5401A - Managing Information Systems 0.25	ITIS5401V - Managing Information Systems 0.25	ITIS5401A - Managing Information Systems 0.25 ITIS5401B - Managing Information Systems 0.25

	ITIS5401V - Managing Information Systems 0.25 BUSI5480W - Sem in Info Systems I 0.50 BUSI6400W - Sem in Info Systems I 0.50 ITIS5401V - Managing Information Systems 0.25	ITIS5401A - Managing Information Systems 0.25 ITIS5401B - Managing Information Systems 0.25 ITIS5401V - Managing Information Systems 0.25 ITIS5401V - Managing Information Systems 0.25	ITIS5401V - Managing Information Systems 0.25 ITIS5401P - Managing Information Systems 0.25 ITIS5401V - Managing Information Systems 0.25
Gray, Emily	ACCT5136A - Advanced Integration II 0.50 ACCT5136B - Advanced Integration II 0.50 ACCT5136P - Advanced Integration II 0.50 BUSI5992A - Tutorials/Directed Studies 0.25 BUSI5992B - Tutorials/Directed Studies 0.25 BUSI2005R - Income Tax Fundamentals 0.50 BUSI5992A - Tutorials/Directed Studies 0.25 BUSI5992B - Tutorials/Directed Studies 0.25	ACCT5129A - Professional Accting Cases I 0.25 ACCT5129B - Professional Accting Cases I 0.25 ACCT5136A - Advanced Integration II 0.50 ACCT5136B - Advanced Integration II 0.50 ACCT5136P - Advanced Integration II 0.50 ACCT5137P - Professional Acctng Cases II 0.25 BUSI2005R - Income Tax Fundamentals 0.50	ACCT5136A - Advanced Integration II 0.50 ACCT5136B - Advanced Integration II 0.50 ACCT5136P - Advanced Integration II 0.50 BUSI2005R - Income Tax Fundamentals 0.50 BUSI1004E - Fin. Acctng for Busi. Students 0.50 BUSI1004F - Fin. Acctng for Busi. Students 0.50 BUSI2005R - Income Tax Fundamentals 0.50
Gulanowski, Daniel	BUSI1701A - Intro. International Business 0.50 BUSI2701A - Fundamentals of Intl Business 0.50 BUSI2701B - Fundamentals of Intl Business 0.50 BUSI3704A - Int'l Business Environment 0.50	BUSI1701A - Intro. International Business 0.50 BUSI2701A - Fundamentals of Intl Business 0.50 BUSI2701B - Fundamentals of Intl Business 0.50 BUSI3704A - Int'l Business Environment 0.50	BUSI1701A - Intro. International Business 0.50 BUSI2701A - Fundamentals of Intl Business 0.50 BUSI2701B - Fundamentals of Intl Business 0.50 BUSI2701G - Fundamentals of Intl Business 0.50
Hayibor, Sefa	BUSI4601A - Business Ethics 0.50 BUSI4601B - Business Ethics 0.50 BUSI4601C - Business Ethics 0.50 BUSI5980F - Foundations of Mgmt Theory 0.50 BUSI6910F - Foundations of Management 0.50	BUSI4601D - Business Ethics 0.50 BUSI4601E - Business Ethics 0.50 BUSI4601F - Business Ethics 0.50	BUSI5980A - Foundations of Mgmt Theory 0.50 BUSI5980F - Foundations of Mgmt Theory 0.50 BUSI6910A - Foundations of Management 0.50 BUSI6910F - Foundations of Management 0.50 BUSI4601D - Business Ethics 0.50 BUSI4601E - Business Ethics 0.50 BUSI4601F - Business Ethics 0.50 BUSI5802Q - Business Ethics 0.25
Helal, Robert	BUSI3800A - Sprott Student Consulting I 0.50 BUSI4800A - SSC II 0.50 BUSI5997A - Project Based Service Learning 0.50 BUSI1800A - Introduction to Business 0.50 BUSI1800B - Introduction to Business 0.50 BUSI1800C - Introduction to Business 0.50	BUSI3800A - Business Case Analysis 0.50 BUSI4800A - SSC II 0.50 BUSI5997A - Project Based Service Learning 0.50 BUSI1800A - Introduction to Business 0.50 BUSI1800B - Introduction to Business 0.50 BUSI3800A - Sprott Student Consulting I 0.50 BUSI4800A - SSC II 0.50	MKTG5200I - Marketing Strategy 0.50 MKTG5211I - Technology Marketing 0.25 BUSI3800A - Business Case Analysis 0.50 BUSI4800A - SSC II 0.50 MKTG5200A - Marketing Strategy 0.50

	BUSI3800A - Sprott Student Consulting I 0.50 BUSI4800A - SSC II 0.50 BUSI5997F - Project Based Service Learning 0.50 BUSI3800A - Sprott Student Consulting I 0.50 BUSI4414A - Capstone in Business Analytics 0.50 BUSI4800A - SSC II 0.50 BUSI5997W - Project Based Service Learning 0.50	BUSI5997F - Project Based Service Learning 0.50 BUSI3800A - Sprott Student Consulting I 0.50 BUSI4800A - SSC II 0.50 BUSI5997W - Project Based Service Learning 0.50	
Hine, Michael	ITIS5434Q - Data Visualization 0.25 BUSI2401A - Intro Data Analytics 0.50 BUSI3434A - Data Visual 0.50	ITIS5434N - Data Visualization 0.25 ITIS5434P - Data Visualization 0.25 BUSI2401E - Intro Data Analytics 0.50 BUSI2401F - Intro Data Analytics 0.50 BUSI3434A - Data Visual 0.50 ITIS5434A - Data Visualization 0.25 ITIS5434Q - Data Visualization 0.25	BUSI2401A - Intro Data Analytics 0.50 ITIS5434A - Data Visualization 0.25 BUSI2401B - Intro Data Analytics 0.50 ITIS5434A - Data Visualization 0.25
Isabelle, Diane	BUSI2701F - Fundamentals of Intl Business 0.50 BUSI4710A - International New Ventures 0.50	BUSI2701C - Fundamentals of Intl Business 0.50 IBUS5701P - International Business 0.25	BUSI2701D - Fundamentals of Intl Business 0.50 BUSI2701E - Fundamentals of Intl Business 0.50 BUSI4710A - International New Ventures 0.50 IBUS5701P - International Business 0.25
Ji, Shaobo	BUSI5906M - Special Topics 0.25 ITIS5401Q - Managing Information Systems 0.25 BUSI5998N - MBA Skills Workshop 0 BUSI5905Q - Special Topics 0.50 ITIS5401N - Managing Information Systems 0.25	ITIS5401N - Managing Information Systems 0.25	BUSI5906Q - Special Topics 0.25 BUSI5998N - MBA Skills Workshop 0 BUSI5998Q - MBA Skills Workshop 0 BUSI5480W - Sem in Info Systems I 0.50 BUSI6400W - Sem in Info Systems I 0.50
Jiang, Guoliang (Frank)	IBUS5701V - International Business 0.25 STGY5903V - Strategic Concepts 0.50 STGY5903N - Strategic Concepts 0.50 IBUS5701V - International Business 0.25 STGY5903V - Strategic Concepts 0.50	IBUS5701V - International Business 0.25 STGY5903N - Strategic Concepts 0.50 STGY5903V - Strategic Concepts 0.50 IBUS5701V - International Business 0.25 STGY5903B - Strategic Concepts 0.50 STGY5903P - Strategic Concepts 0.50 STGY5903Q - Strategic Concepts 0.50 STGY5903V - Strategic Concepts 0.50 IBUS5701V - International Business 0.25	BUSI5780F - Seminar in Int'l Business I 0.50 BUSI6700F - Sem. in Int'l Bus. I 0.50 IBUS5701V - International Business 0.25 STGY5903N - Strategic Concepts 0.50 STGY5903P - Strategic Concepts 0.50 STGY5903Q - Strategic Concepts 0.50 STGY5903V - Strategic Concepts 0.50 IBUS5701V - International Business 0.25

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Jones Joannis, Emily	BUSI2800A – Entrepreneurship 0.50 BUSI2800B – Entrepreneurship 0.50 BUSI4904M - Directed Studies I 0.50 BUSI5997A - Project Based Service Learning 0.50 BUSI2800E – Entrepreneurship 0.50 BUSI4904M - Directed Studies I 0.50 BUSI5997B - Project Based Service Learning 0.50		
Keddie, Leanne	ACCT5134A - Advanced Integration I 0.50 ACCT5134B - Advanced Integration I 0.50 ACCT5134P - Advanced Integration I 0.50 ACCT5012P - Performance Measurement & Cont 0.25 BUSI5108A - Sustainable Business Development 0.25 BUSI2819A - Sustainability Accounting 0.50 BUSI5081W - Seminar in Accounting II 0.50 BUSI6001W - Seminar in Accounting II 0.50	ACCT5134A - Advanced Integration I 0.50 ACCT5134B - Advanced Integration I 0.50 ACCT5134P - Advanced Integration I 0.50 BUSI2819A - Sustainability Accounting 0.50 BUSI5080W - Seminar in Accounting I 0.50 BUSI6000W - Seminar in Accounting I 0.50	ACCT5134A - Advanced Integration I 0.50 ACCT5134B - Advanced Integration I 0.50 ACCT5134P - Advanced Integration I 0.50 BUSI2819A - Sustainability Accounting 0.50 BUSI5081W - Seminar in Accounting II 0.50 BUSI6001W - Seminar in Accounting II 0.50
Kwan, Ernest	BUSI5801A - Statistics for Managers 0.25 BUSI5801P - Statistics for Managers 0.25 BUSI5981F - Stats for Business Research 0.50 BUSI3207A - Marketing Research 0.50 BUSI6905W - Advanced Stat Methods 0.50	BUSI5801A - Statistics for Managers 0.25 BUSI5801B - Statistics for Managers 0.25 BUSI5981F - Stats for Business Research 0.50 BUSI3207A - Marketing Research 0.50 BUSI6905W - Advanced Stat Methods 0.50	
Lee, Ian	STGY5900N - Corporate & Business Strategy 0.50 BUSI4609A - Strategic Management 0.50 BUSI4609B - Strategic Management 0.50 BUSI4609C - Strategic Management 0.50 BUSI4609E - Strategic Management 0.50 STGY5900Q - Corporate & Business Strategy 0.50	BUSI4609A - Strategic Management 0.50 BUSI4609B - Strategic Management 0.50 BUSI4609C - Strategic Management 0.50 BUSI4609E - Strategic Management 0.50 BUSI4609F - Strategic Management 0.50	BUSI4609A - Strategic Management 0.50 BUSI4609B - Strategic Management 0.50 BUSI4609C - Strategic Management 0.50 BUSI4609E - Strategic Management 0.50 BUSI4609F - Strategic Management 0.50 STGY5900Q - Corporate & Business Strategy 0.50
Li, Shi		BUSI2501B - Business Finance 0.50 BUSI2501C - Business Finance 0.50 BUSI2501D - Business Finance 0.50	BUSI2504B - Essentials of Business Finance 0.50 BUSI2504C - Essentials of Business Finance 0.50 BUSI2504D - Essentials of Business Finance 0.50

		BUSI2501E - Business Finance 0.50 FINA5511B – Investments 0.25 FINA5529A - Equity Analysis 2 0.25	BUSI2504E - Essentials of Business Finance 0.50
Lu, Irene	BUSI3209A - Consumer Behaviour 0.50 BUSI4201A - Marketing Metrics 0.50 BUSI4203A - Marketing: Not-for-Profit Orgs 0.50 BUSI4219A - Sustainability Marketing 0.50	BUSI3209A - Consumer Behaviour 0.50 BUSI4201A - Marketing Metrics 0.50 BUSI4203A - Marketing: Not-for-Profit Orgs 0.50 BUSI4219A - Sustainability Marketing 0.50 BUSI5281W - Sem Mrktg II: Consumer Behav 0.50 BUSI6201W - Seminar in Marketing II 0.50	BUSI6901A - Special Topics 0.50 BUSI3209A - Consumer Behaviour 0.50 BUSI4201A - Marketing Metrics 0.50 BUSI4219A - Sustainability Marketing 0.50
McIntyre, Michael		BUSI5580F - Seminar in Finance I 0.50 BUSI6500F - Seminar in Finance I 0.50 BUSI5581W - Seminar in Finance II 0.50 BUSI6501W - Seminar in Finance II 0.50	BUSI5580F - Seminar in Finance I 0.50 BUSI6500F - Seminar in Finance I 0.50 BUSI5581W - Seminar in Finance II 0.50 BUSI6501W - Seminar in Finance II 0.50
McKay, Ruth	BUSI3119A - Environmental Sustainability 0.50 BUSI5180F - Sem Mgmt I: Modern Org Theory 0.50 BUSI6100F - Sem. in Modern Org'l Theory 0.50 BUSI3102E - Human Resources Management 0.50 BUSI3102F - Human Resources Management 0.50 BUSI3102G - Human Resources Management 0.50	BUSI5180F - Sem Mgmt I: Modern Org Theory 0.50 BUSI6100F - Sem. in Modern Org'l Theory 0.50 BUSI3102D - Human Resources Management 0.50 BUSI3102E - Human Resources Management 0.50 BUSI3102F - Human Resources Management 0.50 BUSI6109A - Special Topics in Management 0.50	
McShane, Lindsay	BUSI2208B - Introduction to Marketing 0.50 BUSI2208C - Introduction to Marketing 0.50 BUSI4208A - Marketing Management 0.50 MKTG5200A - Marketing Strategy 0.50	BUSI2208A - Introduction to Marketing 0.50 BUSI2208B - Introduction to Marketing 0.50 BUSI4208A - Marketing Management 0.50	BUSI2208A - Introduction to Marketing 0.50 BUSI2208B - Introduction to Marketing 0.50 BUSI4208A - Marketing Management 0.50
Mohsni, Sana	FINA5502V - Corporate Finance 0.25 FINA5519Z - Financial Risk Management 0.25 BUSI4500A - Advanced Corporate Finance 0.50 BUSI5581F - Seminar in Finance II 0.50 BUSI6501F - Seminar in Finance II 0.50	FINA5502V - Corporate Finance 0.25 BUSI3500A - Applied Corporate Finance 0.50 BUSI3500B - Applied Corporate Finance 0.50 BUSI4500A - Advanced Corporate Finance 0.50 FINA5502V - Corporate Finance 0.25 BUSI4500B - Advanced Corporate Finance 0.50 FINA5502A - Corporate Finance 0.25	FINA5502V - Corporate Finance 0.25

	FINA5502V - Corporate Finance 0.25 FINA5505Z - Corporate Finance - M.Fin. 0.25 BUSI4500B - Advanced Corporate Finance 0.50 FINA5502A - Corporate Finance 0.25 FINA5502V - Corporate Finance 0.25	FINA5502B - Corporate Finance 0.25 FINA5502V - Corporate Finance 0.25 FINA5505A - Corporate Finance - M.Fin. 0.25	
Muegge, Steven	TIMG5106A - Open Source Business 0.50	TIMG5103S - Adv Tps: Tech Innovation Mgmt 0.50 TIMG5901A - M.Eng Project 1 TIMG5905S - M.Ent. Project 1 TIMG5907S - M.A.B.A. Project 1 TIMG5909A - M.A.Sc. Thesis 0 TIMG5001A - Principles of Tech Innov Mgmt 0.50 TIMG5001B - Principles of Tech Innov Mgmt 0.50	TIMG5004S - Resrch Meth in Tech Innov Mgmt 0.50 TIMG5901A - M.Eng Project 1 TIMG5905S - M.Ent. Project 1 TIMG5907S - M.A.B.A. Project 1 TIMG5909A - M.A.Sc. Thesis 0 TIMG5001T - Principles of Tech Innov Mgmt 0.50 TIMG5104F - Dir Std: Tech Innovation Mgmt 0.50 TIMG5901T - M.Eng Project 1 TIMG5905F - M.Ent. Project 1 TIMG5907F - M.A.B.A. Project 1 TIMG5909T - M.A.Sc. Thesis 0 TIMG5001T - Principles of Tech Innov Mgmt 0.50 TIMG5901T - M.Eng Project 1 TIMG5905W - M.Ent. Project 1 TIMG5907W - M.A.B.A. Project 1 TIMG5909T - M.A.Sc. Thesis 0
Nardon, Luciara	BUSI5983W - Qualitative Research Design 0.50 BUSI6903W - Qualitative Research Design 0.50	BUSI6901A - Special Topics 0.50 BUSI5781F - Seminar in Int'l Business II 0.50 BUSI5982F - Research Methodology 0.50 BUSI6705F - Sem. in Int'l Bus. II 0.50 BUSI6902F - Research Methodology 0.50	BUSI6902F - Research Methodology 0.50 BUSI5983W - Qualitative Research Design 0.50 BUSI6903W - Qualitative Research Design 0.50
Neilson, Leighann	BUSI5989S - M.Sc. Thesis 0 BUSI5992A - Tutorials/Directed Studies 0.25 BUSI2208F - Introduction to Marketing 0.50 BUSI2208G - Introduction to Marketing 0.50	BUSI5989S - M.Sc. Thesis 0 BUSI6900S - Directed Readings 0.50 BUSI6907S - Ph.D. Thesis Tutorial 0.50 BUSI6908S - Ph.D. Comprehensives 0 BUSI6909S - Ph.D. Thesis 0 BUSI5980A - Foundations of Mgmt Theory 0.50 BUSI5980F - Foundations of Mgmt Theory 0.50 BUSI5989F - M.Sc. Thesis 0 BUSI6907F - Ph.D. Thesis Tutorial 0.50 BUSI6908F - Ph.D. Comprehensives 0	BUSI5989S - M.Sc. Thesis 0 BUSI6900S - Directed Readings 0.50 BUSI6907S - Ph.D. Thesis Tutorial 0.50 BUSI6908S - Ph.D. Comprehensives 0 BUSI6909S - Ph.D. Thesis 0 BUSI5982F - Research Methodology 0.50 BUSI5989F - M.Sc. Thesis 0 BUSI6900F - Directed Readings 0.50 BUSI6907F - Ph.D. Thesis Tutorial 0.50 BUSI6908F - Ph.D. Comprehensives 0

		BUSI6909F - Ph.D. Thesis 0 BUSI6910A - Foundations of Management 0.50 BUSI6910F - Foundations of Management 0.50 BUSI5983W - Qualitative Research Design 0.50 BUSI5989W - M.Sc. Thesis 0 BUSI6900W - Directed Readings 0.50 BUSI6903W - Qualitative Research Design 0.50 BUSI6907W - Ph.D. Thesis Tutorial 0.50 BUSI6908W - Ph.D. Comprehensives 0 BUSI6909W - Ph.D. Thesis 0	BUSI6909F - Ph.D. Thesis 0 BUSI5280W - Sem Mktg I: Mgmt & Strategy 0.50 BUSI5989W - M.Sc. Thesis 0 BUSI6200W - Seminar in Marketing I 0.50 BUSI6900W - Directed Readings 0.50 BUSI6907W - Ph.D. Thesis Tutorial 0.50 BUSI6908W - Ph.D. Comprehensives 0 BUSI6909W - Ph.D. Thesis 0
Nelson, Rodney	BUSI5802V - Business Ethics 0.25 BUSI3750A - Applied Intercultural Commerce 0.25 BUSI4705A - Ethics&Cross-cultural Interact 0.50 BUSI5802V - Business Ethics 0.25 BUSI2750A - Intercultural Communications 0.50 BUSI3750A - Applied Intercultural Commerce 0.25 BUSI3750B - Applied Intercultural Commerce 0.50 BUSI4705B - Ethics&Cross-cultural Interact 0.50 BUSI5802V - Business Ethics 0.25	BUSI5802V - Business Ethics 0.25 BUSI3750A - Applied Intercultural Commerce 0.25 BUSI4705A - Ethics&Cross-cultural Interact 0.50 BUSI5802P - Business Ethics 0.25 BUSI5802V - Business Ethics 0.25 BUSI3750A - Applied Intercultural Commerce 0.25 BUSI3750B - Applied Intercultural Commerce 0.50 BUSI4705B - Ethics&Cross-cultural Interact 0.50 BUSI5802A - Business Ethics 0.25 BUSI5802B - Business Ethics 0.25 BUSI5802V - Business Ethics 0.25	BUSI3700A - Cross-Cultural Communication 0.50 BUSI4705A - Ethics&Cross-cultural Interact 0.50 BUSI5802P - Business Ethics 0.25 BUSI5802V - Business Ethics 0.25 STGY5900A - Corporate & Business Strategy 0.50 STGY5900B - Corporate & Business Strategy 0.50 BUSI3700B - Cross-Cultural Communication 0.50 BUSI4705B - Ethics&Cross-cultural Interact 0.50 BUSI5802V - Business Ethics 0.25
Nemiroff, Howard	FINA5511V – Investments 0.25 BUSI4503A - Applied Portfolio Management 0.50 FINA5511Q – Investments 0.25 FINA5511V – Investments 0.25 BUSI4503B - Applied Portfolio Management 0.50 FINA5511V – Investments 0.25	BUSI3701A - Practicum in Int. Business 0.50 BUSI3702A - Practicum in Int. Business 0.50 BUSI4904A - Directed Studies I 1 BUSI4905A - Directed Studies II 0.50 BUSI4905B - Directed Studies II 0.50 BUSI4905I - Directed Studies II 0.50 BUSI4906A - Research Project for Business 1 FINA5511V – Investments 0.25 BUSI4503A - Applied Portfolio Management 0.50 FINA5511N – Investments 0.25 FINA5511V – Investments 0.25	BUSI3701A - Practicum in Int. Business 0.50 BUSI3702A - Practicum in Int. Business 0.50 BUSI4905B - Directed Studies II 0.50 FINA5511Q – Investments 0.25 BUSI4503A - Applied Portfolio Management 0.50 BUSI4905I - Directed Studies II 0.50 BUSI3502C – Investments 0.50 BUSI4503B - Applied Portfolio Management 0.50 BUSI4905I - Directed Studies II 0.50

		BUSI4503B - Applied Portfolio Management 0.50 FINA5511V – Investments 0.25	
Nsakanda, Aaron	TOMS5302V - Operations Management 0.25 TOMS5302V - Operations Management 0.25 BUSI2301E - Intro to Supply Chains 0.50 BUSI2301F - Intro to Supply Chains 0.50 BUSI2301G - Intro to Supply Chains 0.50 BUSI3305A - Logistics and Transportation 0.50 TOMS5302P - Operations Management 0.25 TOMS5302V - Operations Management 0.25	TOMS5302V - Operations Management 0.25 BUSI3305A - Logistics and Transportation 0.50 TOMS5302V - Operations Management 0.25 BUSI2301D - Intro to Supply Chains 0.50 BUSI2301E - Intro to Supply Chains 0.50 BUSI2301F - Intro to Supply Chains 0.50 TOMS5302P - Operations Management 0.25 TOMS5302V - Operations Management 0.25	BUSI3305A - Logistics and Transportation 0.50 BUSI2301E - Intro to Supply Chains 0.50 BUSI2301F - Intro to Supply Chains 0.50 TOMS5302P - Operations Management 0.25 TOMS5302V - Operations Management 0.25
Otchere, Isaac	ACCT5130P - Advanced Finance 0.50 BUSI2503R - Introduction to Finance 0.50 FINA5501V - Financial Management 0.25 FINA5512V – Valuation 0.25 FINA5513V - Mergers and Acquisitions 0.25 FINA5525Z - Sustainable Finance 0.25 BUSI2503R - Introduction to Finance 0.50 BUSI4510A - Mergers and Acquisitions 0.50 BUSI5581F - Seminar in Finance II 0.50 BUSI6501F - Seminar in Finance II 0.50 FINA5501A - Financial Management 0.25 FINA5501P - Financial Management 0.25 FINA5501V - Financial Management 0.25 FINA5512V – Valuation 0.25 FINA5513V - Mergers and Acquisitions 0.25 BUSI2503R - Introduction to Finance 0.50 FINA5501V - Financial Management 0.25 FINA5512V – Valuation 0.25 FINA5513V - Mergers and Acquisitions 0.25 FINA5528Z - Equity Analysis 1 0.25	ACCT5130P - Advanced Finance 0.50 FINA5501V - Financial Management 0.25 FINA5512V - Valuation 0.25 BUSI2503R - Introduction to Finance 0.50 BUSI4510A - Mergers and Acquisitions 0.50 FINA5501P - Financial Management 0.25 FINA5501V - Financial Management 0.25 FINA5512A – Valuation 0.25 FINA5512V – Valuation 0.25 FINA5513A - Mergers and Acquisitions 0.25 FINA5513V - Mergers and Acquisitions 0.25 BUSI2503R - Introduction to Finance 0.50 FINA5501V - Financial Management 0.25 FINA5512V – Valuation 0.25 FINA5513V - Mergers and Acquisitions 0.25 FINA5528W - Equity Analysis 1 0.25	ACCT5130P - Advanced Finance 0.50 BUSI2503R - Introduction to Finance 0.50 BUSI4510A - Mergers and Acquisitions 0.50 FINA5501A - Financial Management 0.25 FINA5501B - Financial Management 0.25 FINA5501P - Financial Management 0.25 FINA5501V - Financial Management 0.25 FINA5512A – Valuation 0.25 FINA5513A - Mergers and Acquisitions 0.25 BUSI2503R - Introduction to Finance 0.50 FINA5501V - Financial Management 0.25
Pupco, Shani	BUSI2121A - Intro Organizational Behaviour 0.50 BUSI2121B - Intro Organizational Behaviour 0.50 BUSI3105A - Managing & Motivating Teams 0.50		

Ramirez, Alejandro	BUSI2401B - Intro Data Analytics 0.50 BUSI2402A - Business Application Developme 0.50 BUSI3406A - Busi Analytics Principles 0.50	BUSI2401A - Intro Data Analytics 0.50 BUSI2402A - Business Application Developme 0.50 BUSI3406A - Busi Analytics Principles 0.50	BUSI2402A - Business Application Developme 0.50 BUSI4406A - Business Analytics 0.50 BUSI2401C - Intro Data Analytics 0.50
Renfro, Rebecca	ACCT5001V - Financial Accounting 0.25 ACCT5122A - Issues in Taxation 0.25 BUSI3701A - Practicum in Int. Business 0.50 BUSI3702A - Practicum in Int. Business 0.50 BUSI4904A - Directed Studies I 1 BUSI4905A - Directed Studies II 0.50 BUSI4905B - Directed Studies II 0.50 BUSI4906A - Research Project for Business 1 ACCT5001V - Financial Accounting 0.25 ACCT5120P - Advanced Concepts 0.50 BUSI3701A - Practicum in Int. Business 0.50 BUSI3702A - Practicum in Int. Business 0.50 BUSI4904A - Directed Studies I 0.50 BUSI4905A - Directed Studies II 0.50 BUSI4905I - Directed Studies II 0.50 BUSI4906A - Research Project for Business 0.50 ACCT5001V - Financial Accounting 0.25 BUSI3701B - Practicum in Int. Business 0.50 BUSI3702B - Practicum in Int. Business 0.50 BUSI4904A - Directed Studies I 0.50 BUSI4905B - Directed Studies II 0.50 BUSI4905I - Directed Studies II 0.50 BUSI4906A - Research Project for Business 0.50	ACCT5001V - Financial Accounting 0.25 ACCT5120A - Advanced Concepts 0.50 ACCT5120B - Advanced Concepts 0.50 ACCT5122A - Issues in Taxation 0.25 ACCT5120P - Advanced Concepts 0.50 BUSI3701A - Practicum in Int. Business 0.50 BUSI3702A - Practicum in Int. Business 0.50 BUSI4901A - Topics in Bus. I 0.50 BUSI4904A - Directed Studies I 0.50 BUSI4905A - Directed Studies II 0.50 BUSI4905I - Directed Studies II 0.50 BUSI4906A - Research Project for Business 0.50 ACCT5001V - Financial Accounting 0.25 ACCT5122P - Issues in Taxation 0.25 BUSI3701B - Practicum in Int. Business 0.50 BUSI3702B - Practicum in Int. Business 0.50 BUSI4904A - Directed Studies I 0.50 BUSI4905B - Directed Studies II 0.50 BUSI4905I - Directed Studies II 0.50 BUSI4906A - Research Project for Business 0.50	ACCT5120A - Advanced Concepts 0.50 ACCT5120B - Advanced Concepts 0.50 ACCT5122A - Issues in Taxation 0.25 BUSI1001R - Financial Accounting 0.50 ACCT5001V - Financial Accounting 0.25 ACCT5120P - Advanced Concepts 0.50 BUSI1001R - Financial Accounting 0.50 BUSI3005A - Taxation I 0.50 BUSI3005B - Taxation I 0.50 ACCT5001V - Financial Accounting 0.25 ACCT5122P - Issues in Taxation 0.25 BUSI1001R - Financial Accounting 0.50
Ritchie, Robin	BUSI5802N - Business Ethics 0.25 BUSI5906K - Special Topics 0.25 BUSI5900A - Directed Studies 0.50 BUSI5900W - Directed Studies 0.50 MKTG5200P - Marketing Strategy 0.50	BUSI5900A - Directed Studies 0.50 BUSI5992A - Tutorials/Directed Studies 0.25 BUSI5992A - Tutorials/Directed Studies 0.25 BUSI5992B - Tutorials/Directed Studies 0.25 BUSI5802Q - Business Ethics 0.25 BUSI5992A - Tutorials/Directed Studies 0.25 BUSI5992B - Tutorials/Directed Studies 0.25 MKTG5200P - Marketing Strategy 0.50	BUSI5997A - Project Based Service Learning 0.50 BUSI5998V - MBA Skills Workshop 0 MKTG5200V - Marketing Strategy 0.50 BUSI5900A - Directed Studies 0.50 BUSI5997I - Project Based Service Learning 0.50 MKTG5200V - Marketing Strategy 0.50 PANL5701F - Social Innovation 0.50 STGY5900P - Corporate & Business Strategy 0.50 BUSI5906Q - Special Topics 0.25

			BUSI5997I - Project Based Service Learning 0.50 MKTG5200P - Marketing Strategy 0.50 MKTG5200V - Marketing Strategy 0.50
Rojas-Mendez, Jose	BUSI3705A - International Buyer Behaviour 0.50 BUSI4205A - International Marketing Strat 0.50 BUSI5780F - Seminar in Int'l Business I 0.50 BUSI6700F - Sem. in Int'l Bus. I 0.50 BUSI3706A - Intl. Business Negotiations 0.50 BUSI4205B - International Marketing Strat 0.50	BUSI3705A - International Buyer Behaviour 0.50 BUSI4205A - International Marketing Strat 0.50 BUSI3706A - Intl. Business Negotiations 0.50 BUSI4205B - International Marketing Strat 0.50	BUSI3705A - International Buyer Behaviour 0.50 BUSI4205A - International Marketing Strat 0.50 BUSI3706A - Intl. Business Negotiations 0.50 BUSI4205B - International Marketing Strat 0.50
Sakka, Ouafa	BUSI1001R - Financial Accounting 0.50 BUSI2001R - Intermediate Accounting I 0.50 BUSI2002R - Intermediate Accounting II 0.50 BUSI3999A - Co-op Work Term 0 BUSI1001R - Financial Accounting 0.50 BUSI2001A - Intermediate Accounting I 0.50 BUSI2001R - Intermediate Accounting I 0.50 BUSI3999A - Co-op Work Term 0 BUSI1001R - Financial Accounting 0.50 BUSI2001B - Intermediate Accounting I 0.50 BUSI3999A - Co-op Work Term 0	BUSI2001R - Intermediate Accounting I 0.50 BUSI3999A - Co-op Work Term 0 BUSI2001A - Intermediate Accounting I 0.50 BUSI2001R - Intermediate Accounting I 0.50 BUSI2002R - Intermediate Accounting II 0.50 BUSI3999A - Co-op Work Term 0 BUSI1001R - Financial Accounting 0.50 BUSI2001B - Intermediate Accounting I 0.50 BUSI3999A - Co-op Work Term 0	BUSI1002R - Management Accounting 0.50 BUSI3999A - Co-op Work Term 0 BUSI2001R - Intermediate Accounting I 0.50 BUSI3999A - Co-op Work Term 0 BUSI1002R - Management Accounting 0.50 BUSI1005B - Managerial Acctng for Busi. St 0.50 BUSI2001B - Intermediate Accounting I 0.50 BUSI2001R - Intermediate Accounting I 0.50 BUSI3999A - Co-op Work Term 0
Schweitzer, Linda	BUSI3309A - Project Management 0.50 BUSI3309B - Project Management 0.50 MGMT5113P - Managing Teams 0.25	BUSI5801V - Statistics for Managers 0.25 BUSI3309A - Project Management 0.50 BUSI5801P - Statistics for Managers 0.25 BUSI5801V - Statistics for Managers 0.25 BUSI3309B - Project Management 0.50 MGMT5113P - Managing Teams 0.25	BUSI5801V - Statistics for Managers 0.25 BUSI3309A - Project Management 0.50 BUSI5801P - Statistics for Managers 0.25 BUSI5801V - Statistics for Managers 0.25 BUSI3309B - Project Management 0.50 BUSI5801V - Statistics for Managers 0.25 MGMT5113P - Managing Teams 0.25
Sears, Gregory	BUSI5982F - Research Methodology 0.50 BUSI6902F - Research Methodology 0.50 BUSI5181W - Sem Mgmt II: Org'l Behaviour 0.50 BUSI6101W - Current Topics in Org'l Behav 0.50	BUSI3102A - Human Resources Management 0.50 BUSI3102B - Human Resources Management 0.50 BUSI5181W - Sem Mgmt II: Org'l Behaviour 0.50	BUSI3102A - Human Resources Management 0.50 BUSI3102B - Human Resources Management 0.50 BUSI5181W - Sem Mgmt II: Org'l Behaviour 0.50 BUSI6101W - Current Topics in Org'l Behav 0.50

		BUSI6101W - Current Topics in Org'l Behav 0.50	
Smart, Robert	BUSI2101A - Organizational Behaviour 0.50 BUSI3104A - Managing Individual Performance 0.50 BUSI4117B - Creative Thinking 0.50 BUSI4117B - Creative Thinking 0.50	MGMT5100V - Managing People&Organization 0.50 BUSI2101A - Organizational Behaviour 0.50 BUSI4111A - Training and Development 0.50 BUSI4117A - Creative Thinking 0.50 BUSI4117C - Creative Thinking 0.50 MGMT5100V - Managing People&Organization 0.50 BUSI2101B - Organizational Behaviour 0.50 BUSI4111A - Training and Development 0.50 BUSI4117A - Creative Thinking 0.50 BUSI4117C - Creative Thinking 0.50	MGMT5100V - Managing People&Organization 0.50 MGMT5100V - Managing People&Organization 0.50 MGMT5100V - Managing People&Organization 0.50
Sur, Sujit	CLIM5000F - Climate Collaboration 0.50 BUSI4120A - Enviro Sustainability Mgmt 0.50 CLIM5000F - Climate Collaboration 0.50	BUSI3119A - Environmental Sustainability 0.50 CLIM5000F - Climate Collaboration 0.50 STGY5903A - Strategic Concepts 0.50 BUSI4709B - Strategic Mgmt Int'l Business 0.50 BUSI5108A - Sustainable Business Developme 0.25 CLIM5000F - Climate Collaboration 0.50	BUSI3119A - Environmental Sustainability 0.50 CLIM5000F - Climate Collaboration 0.50 BUSI5108A - Sustainable Business Developme 0.25 CLIM5000F - Climate Collaboration 0.50
Tanev, Stoyan	TIMG5103D - Adv Tps: Tech Innovation Mgmt 0.50 TIMG5205A - CustomerValue Creation TechFrm 0.50 TIMG5303B - ML for Tech Entrepreneurship 0.50		TIMG5103C - Adv Tps: Tech Innovation Mgmt 0.50 TIMG5005A - CustomerValue Creation TechFrm 0.50 TIMG5303W - ML for Tech Entrepreneurship 0.50
Wang, Yun (Dora)	BUSI2208A - Introduction to Marketing 0.50 BUSI3204A - Digital Marketing 0.50 BUSI3210A - Personal Selling 0.50 BUSI2208E - Introduction to Marketing 0.50 BUSI3204B - Digital Marketing 0.50 BUSI3205B - Marketing Communications 0.50	BUSI2208C - Introduction to Marketing 0.50 BUSI3210A - Personal Selling 0.50 BUSI2208D - Introduction to Marketing 0.50 BUSI2208E - Introduction to Marketing 0.50 MKTG5200A - Marketing Strategy 0.50 MKTG5200B - Marketing Strategy 0.50	
Westerlund, Mika	TIMG5101A - Integrated Product Development 0.50 TIMG5003A - Issues in Tech Innovation Mgmt 0.50	TIMG5101A - Integrated Product Development 0.50 TIMG5003T - Issues in Tech Innovation Mgmt 0.50	TIMG5101A - Integrated Product Development 0.50 TIMG5003T - Issues in Tech Innovation Mgmt 0.50

	TIMG5003C - Issues in Tech Innovation Mgmt 0.50	TIMG5003A - Issues in Tech Innovation Mgmt 0.50 TIMG5303A - ML for Tech Entrepreneurship 0.50	TIMG5003A - Issues in Tech Innovation Mgmt 0.50
Yang, Yan (Nicole)	BUSI2501A - Business Finance 0.50 BUSI3502A – Investments 0.50 FINA5511A – Investments 0.25 BUSI2501B - Business Finance 0.50 BUSI2501C - Business Finance 0.50 BUSI3502C – Investments 0.50 FINA5518Z - Alternative Investments 0.25		
Zabolotnyuk, Yuriy	ACCT5130A - Advanced Finance 0.50 ACCT5130B - Advanced Finance 0.50 BUSI5906L - Special Topics 0.25 BUSI5906Q - Special Topics 0.25 FINA5514V - International Finance 0.25 FINA5523Z - Financial Analytics 0.25 BUSI3512A – Derivatives 0.50 FINA5514V - International Finance 0.25 FINA5533O – Ethics 0.25 FINA5533S – Ethics 0.25 FINA5533T – Ethics 0.25 BUSI5906N - Special Topics 0.25 BUSI5906R - Special Topics 0.25 FINA5502P - Corporate Finance 0.25 FINA5514V - International Finance 0.25 FINA5516Z – Derivatives 0.25 FINA5531Z - Fixed Income Analysis 1 0.25	ACCT5130A - Advanced Finance 0.50 ACCT5130B - Advanced Finance 0.50 FINA5514V - International Finance 0.25 BUSI3512A – Derivatives 0.50 BUSI3512B – Derivatives 0.50 FINA5511A – Investments 0.25 FINA5514V - International Finance 0.25 FINA5502P - Corporate Finance 0.25 FINA5514V - International Finance 0.25 FINA5516A – Derivatives 0.25 FINA5531A - Fixed Income Analysis 1 0.25 FINA5532A - Fixed Income Analysis 2 0.25	ACCT5130A - Advanced Finance 0.50 ACCT5130B - Advanced Finance 0.50 BUSI3512A – Derivatives 0.50 BUSI3512B – Derivatives 0.50 FINA5511A – Investments 0.25 BUSI5906T - Special Topics 0.25 FINA5502B - Corporate Finance 0.25 FINA5502P - Corporate Finance 0.25
Zyglidopoulos, Stelios	BUSI6900S - Directed Readings 0.50 BUSI6907S - Ph.D. Thesis Tutorial 0.50 BUSI6908S - Ph.D. Comprehensives 0 BUSI6909S - Ph.D. Thesis 0 STGY5900T - Corporate & Business Strategy 0.50 STGY5900V - Corporate & Business Strategy 0.50 BUSI5989F - M.Sc. Thesis 0 BUSI6900F - Directed Readings 0.50	STGY5900V - Corporate & Business Strategy 0.50 STGY5900A - Corporate & Business Strategy 0.50 STGY5900P - Corporate & Business Strategy 0.50 STGY5900V - Corporate & Business Strategy 0.50 BUSI6109B - Special Topics in Management 0.50	BUSI4609G - Strategic Management 0.50 BUSI4609H - Strategic Management 0.50 STGY5900C - Corporate & Business Strategy 0.50 STGY5900V - Corporate & Business Strategy 0.50

	BUSI6907F - Ph.D. Thesis Tutorial 0.50 BUSI6908F - Ph.D. Comprehensives 0 BUSI6909F - Ph.D. Thesis 0 STGY5900B - Corporate & Business Strategy 0.50 STGY5900P - Corporate & Business Strategy 0.50 STGY5900T - Corporate & Business Strategy 0.50 STGY5900V - Corporate & Business Strategy 0.50 BUSI5989W - M.Sc. Thesis 0 BUSI6109B - Special Topics in Management 0.50 BUSI6900W - Directed Readings 0.50 BUSI6907W - Ph.D. Thesis Tutorial 0.50 BUSI6908W - Ph.D. Comprehensives 0 BUSI6909W - Ph.D. Thesis 0 STGY5900T - Corporate & Business Strategy 0.50 STGY5900V - Corporate & Business Strategy 0.50	STGY5900V - Corporate & Business Strategy 0.50	

Discussant Report

New Program Review

Name: Hashmat Khan

March 18, 2025

Program being reviewed

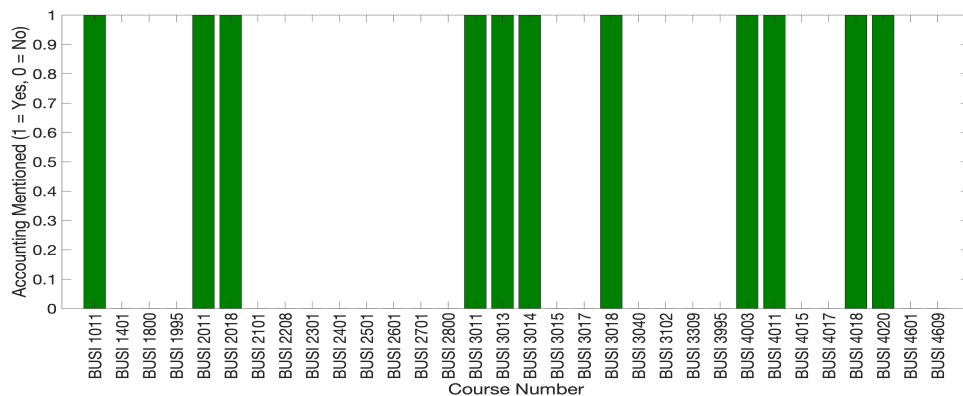
Bachelor of Accounting (BAcc)

Review of self-study (Volume I)

The self-study is well-written and provides a good description of the new Bachelor of Accounting (BAcc) program in the Sprott School of Business. The BAcc is intended to (i) deliver advanced and in-depth knowledge in the field of accounting at the undergraduate level; (ii) offer a curriculum aligned with the Chartered Professional Accountant (CPA) competency map and industry demands; (iii) enhance outreach to high school students interested in accounting; and (iv) provide pathways for the CPA designation and an M.A. in Accounting. The learning outcomes (LOs) are clearly mapped to Degree Level Expectations (DLEs), with a well-laid-out program curriculum map and an LO assessment rubric. I have noted two places where some clarification can be provided.

(1) While the focus of the program is on Accounting, it is notable that of the 32 total BUSI courses in the BAcc program only 11 mention the word 'Accounting', as displayed in Figure 1.

Figure 1: Accounting for "Accounting" in BUSI Course Description



It may be that this 11/32 accounting courses' share represents a good 'depth-breadth' tradeoff in the curriculum. Or, alternatively, there may be a desire to introduce more accounting courses in the program and substitute out a few other BUSI courses. I did not see any discussion in the self-study around this point.

(2) The enrolment target are projected to grow from 100 in Year 1 to 500 by the program's Year 3, a 400% increase in 3 years! Is this correct?

Review of External Reviewers' Report

The External Reviewers' Report is highly favourable towards the new program in terms of its degree exclusivity, resources, and quality. They highlight that, as a degree focused exclusively on accounting education, the BAcc differs from the Bachelor of Commerce (B.Com.), which offers a broader business education. Specifically, the BAcc is structured around accounting disciplines, ensuring that graduates are well-equipped with the technical and professional competencies essential for the accounting profession.

They have made seven clear recommendations following their assessment of the program, with six categorized as 'opportunities' and one as a 'concern'. This latter recommendation relates to mitigating 'internal migration' from B.Com. (Accounting Concentration) to BAcc. The Reviewers are concerned about growth in BAcc at the expense of B.Com. (Accounting Concentration) and offer some constructive suggestions.

Review of Unit Response and Implementation Plan

Unit Response and Implementation Plan: Summary of Recommendations

The unit responses to the recommendations are all either '*agreed to unconditionally*' or '*agreed to in principle*', and none require a calendar change. The implementation plan is clearly specified for each of the seven recommendations. The unit's response to the Reviewers' concern about mitigating enrolment shift states that '*Net new enrolment* will be our KPI to assess our success in BAcc recruitment.' In Section E.2 of the self-study, it is mentioned that: *Over the first two years we expect most program enrolments to come from our current students enrolled in the B.Com. Accounting Concentration (currently 538 enrolled), therefore course enrolments in the joint B.Com./BAcc core courses will not be greatly impacted.* This statement seems to imply that significant 'internal migration' is, in fact, expected. If correct, the stated KPI of net new enrolment seem unlikely to be achievable in the first two years of the program.

DISCUSSANT'S CONCERN:

I do not have any concern.

DISCUSSANT RECOMMENDATION:

That in the letter to the unit with the categorization, it is suggested to consider the points raised above in their launch of the B. Acc program.

Recommendation of program categorization

Recommended to commence.

**Carleton University Site Visit
New Undergraduate Program in Bachelor of Accounting
Date: February 25, 2025**

External Reviewers: Dr. Jing Lu, University of Guelph
Prof. Ling Chu, Wilfred Laurier University

Internal Reviewer: Dr. Hashmat Khan, Associate Vice-President (Academic Programs and Strategic Initiatives)

<https://us06web.zoom.us/j/86325782113?pwd=2b1Yz3zc77nRod1RqaJhRyDP5sVy9A.1>

Time	February 25, 2025	Location
8:45 – 9:00	Morning meeting (Externals and Internal)	zoom
9:00 – 10:00	Meeting with Rebecca Renfroe (Associate Dean, Student Success and Recruitment, Undergraduate Programs) and Emily Gray (Associate Dean, Student Success and Recruitment, Professional Graduate Programs) Sprott School of Business	zoom
10:00 –10:30	Virtual Department Tour with Emily Mantha (Manager Strategy & Quality)	zoom
10:45-11:45	Meeting with Faculty	zoom
11:45-1:00	Lunch	
1:00 -1:30	Debrief meeting with Associate Deans, Emily Gray and Rebecca Renfroe, Sprott School of Business	zoom
1:35-2:05	Meeting with Departmental Administrative Staff: Debbie Casselman-Jones (Manager of Operations), Maria Walt (Manager Undergraduate Programs), Emily Mantha (Manager Strategy & Quality)	zoom
2:15-2:45	Meeting with Dr. David Hornsby, Vice-Provost and Associate Vice-President (Academic)	zoom
3:00-3:30	Closing Meeting with Dr. Hashmat Khan, Associate Vice-President (Academic Programs and Strategic Initiatives)	zoom
3:30-4:30	External Reviewers Report Preparation Meeting	zoom

External Reviewers Biographies



Jing Lu (PhD, MBA, CFA) is an Associate Professor of Accounting and Interim Chair in the Department of Management at the **University of Guelph's** Lang School of Business and Economics. She holds a bachelor's degree in Software Engineering from Shanghai Jiaotong University (China), an MBA in Finance from Sung Kyun Kwan University (South Korea), and a PhD in Accounting from the University of Calgary (Canada).

Dr. Lu's research focuses on sustainability accounting, corporate governance, environmental management, and big data. Her work is supported by extensive expertise in archival research, data analysis, and statistical modeling. She is also an experienced educator, regularly teaching courses in accounting, statistics, and business analytics.

Before joining the University of Guelph, Dr. Lu was a faculty member at Nipissing University.



Professor Ling Chu's primary research interests focus on federal income tax law and its impact on individual and business decision-making. Her work has been widely published in prestigious, peer-reviewed academic journals, including the *Journal of Accounting and Economics*, *Journal of Accounting, Auditing and Finance*, *Advances in Accounting*, *Canadian Tax Journal*, *European Accounting Review*, and *Issues in Accounting Education*.

In addition to her ongoing research, Professor Chu is dedicated to developing and teaching undergraduate and graduate tax courses at the Lazaridis School of Business & Economics, **Wilfrid Laurier University**. She teaches/has taught:

- **Taxation III** in the Graduate Diploma in Accounting program
- **Taxation II** at the CPA-MBA level
- Tax planning topics for the **Lazaridis Executive Master's in Technology Management** program

Her teaching approach emphasizes innovative and practical projects that engage students in both technical and real-world applications of taxation.

Among her numerous academic honors, Professor Chu was awarded the **Glenn Carroll Teaching Fellowship** from the Lazaridis School in recognition of teaching excellence. In 2022, she was selected as one of an elite group of 34 Ontario CPAs to receive the **Fellow CPA (FCPA) designation**, the highest distinction awarded to a CPA.

External Reviewer Report Template – New Programs

The external reviewer's joint report serves to inform the Senate Quality Assurance and Planning Committee and Carleton University Senate. This joint report can be brief on those criteria that reviewers feel are being met successfully and focus on 1) criteria that give rise to issues and on recommendations for the program and on 2) significant strengths, including any clearly innovative and creative aspects of the program. In the sections below you will find bullets, taken directly from the New Program Review Terms of Reference and Carleton University IQAP, these are items to consider and can be used as a guide but are not individual questions requiring specific responses. At the end of the document, we ask that you summarize your overall recommendations for the program.

Please note that the Internal Reviewer does not have a role in the writing of this joint report and that this document will be made public, we would ask that you please refrain from using specific names or identifiers as all comments are to be held anonymous on the report.

Recommendations

The most important part of the report from the point of view of the university will be the recommendations made for program improvement (a minimum of 3 are required). We therefore request that all recommendations be clearly listed under 3 main categories:

- **Weakness:** Remedial action is recommended to strengthen compliance with program quality standards.
- **Concern:** Potential risk to future quality that should be considered.
- **Opportunity:** Recommendation for future enhancements

Program(s) being reviewed:	Bachelor of Accounting
Date of review:	Feb 26, 2025
Names and Emails of External Reviewers:	Ling Chu, lchu@wlu.ca Jing Lu, jlu11@uoguelph.ca
Date of Report:	Mar 5, 2025

Considerations for New Program Approval

Program Objectives

- Clarity of the program's objectives
- Appropriateness of degree nomenclature given the program's objectives
- Consistency of the program's objective with the institution's mission and academic plans

The Bachelor of Accounting (B. Acc.) program presents well-defined and comprehensive objectives, all of which are clearly articulated throughout. The program is designed to provide students with advanced and specialized knowledge in accounting, explicitly targeting those seeking to obtain CPA (Chartered Professional Accountant) designation. The program integrates core accounting competencies, ethical considerations, sustainability and data analytics, aligning with CPA Canada's Competency Map 2.0. The inclusion of decision-making competencies, equity, diversity, and inclusion (EDI), Indigenous perspectives, and emerging technologies demonstrates a forward-looking approach in response to evolving industry expectations. Additionally, the program's emphasis on experiential learning, including co-op opportunities and capstone course(s), further enhances its alignment with both student and employer needs.

The proposed Bachelor of Accounting (B. Acc.) degree is very appropriate given its specialized focus. Unlike a Bachelor of Commerce (B. Com.), which provides a broad business education, the B. Acc. is structured specifically around accounting disciplines, ensuring that graduates are well-equipped with the technical and professional competencies required for the accounting profession. Alignment with CPA accreditation pathways further supports the B. Acc. degree, as it signifies a degree dedicated exclusively to accounting education.

The B. Acc. program also aligns very well with Carleton University's mission and academic strategic plans, particularly within the Sprott School of Business Strategic Plan and the University's broader Strategic Integrated Plan. This program supports the beneficial principles of lifelong learning and experiential education, fostering industry engagement through co-op opportunities, applied coursework, and community-based tax clinics. The B. Acc. curriculum reflects Carleton's commitment to accessibility, diversity, and inclusivity, incorporating Indigenous perspectives and EDI training as core learning components. Additionally, the B. Acc. program structure allows for interdisciplinary collaboration and leveraging existing courses from multiple faculties, thus strengthening its integration within Carleton's broader academic landscape.

Program Requirements

- Appropriateness of the program's structure and requirements to meet its objects and program-level learning outcomes
- Appropriateness of the program's structure, requirements and program-level learning outcomes in meeting Carleton's undergraduate or graduate Degree Level expectations.
- Appropriateness of the proposed mode(s) of delivery to facilitate students' successful completion of the program-level learning outcomes Ways in which the curriculum addresses the current state of the discipline or area of study
- Identification of any unique curriculum or program innovations or creative components, or significant high impact practices
- Do the program's intellectual profile and learning outcomes match the teaching and research strengths of the academic unit(s)?

We believe that the B. Acc. program is well-structured to meet its key objectives, offering a CPA-aligned curriculum with specialized coursework in financial reporting, taxation, auditing, and data analytics. The capstone course (BUSI 4020) integrates knowledge across accounting multiple disciplines, ensuring both theoretical and applied competencies. Co-op opportunities and experiential learning further enhance students' practical skills development.

This program meets Carleton University's undergraduate Degree Level Expectations (DLEs), being consistent with the University's emphasis on experiential and interdisciplinary education and aligning with its policies on accessibility, diversity, and inclusion.

In-person instruction supports the B. Acc. program's intentional interactive and applied learning approach. The inclusion of data analytics, case-based learning, and work-integrated experiences ensures that students develop both the technical and professional skills essential for successful accounting careers.

As noted previously, the B. Acc. program aligns with CPA Canada's Competency Map 2.0, ensuring that graduates will navigate the evolving accounting profession with advanced technical, analytical, and ethical competencies and thus experience higher levels of sustained employability.

The following innovations differentiate this program from traditional accounting degrees:

- Integration of sustainability and EDI within accounting courses.
- Emphasis on data analytics and emerging technologies.
- CPA-accredited learning pathways with a capstone-based applied skills approach.
- Integrated learning through co-op experience and the Employability Passport.

The Sprott School of Business faculty are well-equipped to deliver the B. Acc. program, having strong collective expertise in accounting, finance, data analytics, and sustainability. The program also benefits from a research-active faculty and industry-experienced professionals, ensuring a balance of theoretical and applied learning.

To enhance accessibility, improve student retention, and attract a more diverse applicant pool—all the while upholding the program's academic integrity and professional relevance—we recommend expanding the modes of delivery through a phased pilot approach, as outlined in the recommendations section.

Assessment of Teaching and Learning

- Appropriateness of the methods for assessing student achievement of the program-level learning outcomes and degree level expectations
- Appropriateness of the plans to monitor and assess:
 - i. The overall quality of the program;
 - ii. Whether the program is achieving in practice its proposed objectives;
 - iii. Whether its students are achieving the program-level learning outcomes;

and

- iv. How the resulting information will be documented and subsequently used to inform continuous program improvement

- Is there a clear indication of essential requirements?

The Bachelor of Accounting program (B. Acc.) includes a clear and coherent framework for assessing student achievements and degree-level expectations. Learning outcomes are explicitly curriculum connected, particularly through upper-year courses such as the capstone BUSI 4609 course (Strategic Management) and BUSI 3040 (Data Analytics and Information Systems for Accounting). These experiences allow students to apply integrated knowledge from multiple business disciplines, ranging from case analyses to final presentations, thereby demonstrating their capacity for higher-order thinking and technical competence. The forthcoming BUSI 4020 Accounting capstone course will offer further experiential learning for B. Acc. students, such as software-based exercises (i.e., corporate tax return preparation) and business decision-making simulations, thereby strengthening their link between theoretical knowledge and real-world competence.

The assessment process itself is geared toward continuous improvement, with each learning objective measured twice over a five-year cycle; this is accomplished through course activities, whereby a random sample of 20% of student submissions is evaluated anonymously with a well-defined rubric. Results are then compiled for annual examination by the Curriculum Review Committee (CRC), whose membership comprises Teaching Area Coordinators from relevant disciplines. Through an iterative cycle of reflection, the CRC identifies curriculum areas requiring refinement or adjustment in order to achieve the desired learning outcomes. Faculty members also engage in regular course-level reflection to identify effective practices and potential enhancements and to ensure that program improvements are informed by evidence-based decisions.

The program's assessment methods—including case analyses, group projects, simulation exercises, and capstone experiences—are standardized, reasonable, and adaptive to an evolving learning environment based on requirements of the CPA profession. To reinforce a gradual alignment with both institutional and professional standards, we have made several recommendations to enhance students' experiential learning, balance their workload, and ensure that the curriculum continues to reflect current industry needs (detailed in the recommendations section).

Admission Requirements

- Appropriateness of the program's admission requirements given the program's objectives and program-level learning outcomes
- Sufficient explanation of alternative requirements, if applicable, for admission into a graduate, second-entry or undergraduate program, e.g., minimum grade point average, additional languages or portfolios, and how the program recognizes prior

work or learning experience.

The B. Acc. admission requirements are well-structured and aligned with its stated objectives, ensuring that students possess the necessary quantitative and analytical skills for success. Prerequisites reflect CPA-accredited program standards, providing a strong foundation for accounting coursework.

The program offers multiple pathways for transfer and advanced standing, accommodating diverse academic backgrounds while upholding academic rigor. Flexible transfer policies enhance accessibility without compromising standards, fostering an inclusive, yet competitive, admissions framework.

However, potential enrolment shifts from the B. Com. Accounting concentration must be carefully monitored and managed to avoid unintended internal migration, which could reduce the B. Acc. program's capacity for attracting a distinct applicant pool and the enrolment of new students. It will be important to clearly differentiate the B. Acc. program from the B. Com. Accounting concentration in order to maintain balanced enrolment, resource allocation, and program integrity. We have presented some suggestions to mitigate such undesired enrolment shifts in the recommendations section.

Resources

Given the program's planned /anticipated class sizes and cohorts as well as its program-level learning outcomes:

- Participation of a sufficient number and quality of core faculty who are competent to teach and/or supervise in the program and foster the appropriate academic environment
- If applicable, discussion/explanation of the role and approximate percentage of adjunct and part-time faculty/limited term appointments used in the delivery of the program and the associated plans to ensure the sustainability of the program and quality of the student experience
- If required, provision of supervision of experiential learning opportunities
- Adequacy of the administrative unit's planned utilization of existing human, physical and financial resources, including implications for the impact on other existing programs at the university
- Evidence that there are adequate resources to sustain the quality of scholarship and research activities produced by students, including library support, information technology support, and laboratory access
- If necessary, additional institutional resources commitments to support the program in step with its ongoing implementation

The Sprott School of Business possesses robust resources to support the

planned Bachelor of Accounting (B. Acc.) degree, chiefly 15 dedicated faculty members combining strong academic research credentials and CPA industry experience across a broad range of specialties. This mix of scholarly and professional backgrounds ensures that a full spectrum of advanced accounting topics can be effectively addressed, along with complementary experiential learning. Should additional teaching support be required, the School also has access to part-time contract instructors fully qualified at AACSB standards.

Since faculty who will teach the B. Acc. program currently instruct a range of required and elective undergraduate and graduate courses, no new hires or additional physical infrastructure are anticipated. The Sprott School of Business's Nicol Building offers technology-rich classrooms; and existing facilities, such as its Bloomberg terminals, will adequately serve the program's needs. Additionally, Carleton University's library (including databases and digital resources) is sufficient for student research. The University also provides broader support, offering course development and pedagogical resources to help faculty maintain high teaching standards. With projected total enrolment reaching about 500 by the third year, careful resource evaluation will determine whether the B. Acc. program is sustainable for desired degree-level outcomes and if it offers a quality learning environment for all students.

Quality and other indicators

- Evidence of the quality of the faculty (e.g., qualifications, funding, honours, awards, research, innovation and scholarly record; appropriateness of collective faculty expertise to contribute substantively to the program and commitment to student mentoring)
- Any other evidence that the program and faculty will ensure the intellectual quality of the student experience

The accounting faculty comprises 15 full, associate, or assistant professors, 7 of whom are in the teaching stream. Many are CPAs with extensive professional practice and industry experience; thus their combined qualifications reflect a strong blend of scholarly research and applied expertise. Over the past five years, they have produced 40 peer-reviewed journal articles and 85 other peer-reviewed contributions, including conference presentations, proceedings, and books. This robust activity illustrates their strong engagement with research and their commitment to making knowledge contributions in the accounting field.

Additionally, their involvement with CPA professional activities—including service on the Competency Map Task Force—provides up-to-date professional perspectives and underscores their dedication to maintaining high professional standards. The Professional Accounting Research Group (PARG) at the Sprott School of Business further demonstrates this commitment to cross-disciplinary collaboration. In this context, many faculty members share specialized research and teaching skills that cover taxation, financial reporting, auditing, cost management, sustainability,

and data analytics, again highlighting the broad range of competencies essential to the program.

In such a robust environment, B. Acc. students will broaden their perspectives, succeed academically and be prepared for the complex demands of real-world professional accounting well before graduation.

Additional Comments:

Summary of Recommendations

Use the chart below to summarize your overall recommendations for the program. If possible, it would be beneficial to the university for the recommendations to be prioritized.

Recommendation	Category (Weakness, Concern, Opportunity)
1) Enrolment Recommendation: Mitigating enrolment shifts from B. Com. Accounting	Concern
2) Experiential Learning Recommendation: Introduce a new capstone course in Year 3 to replace BUSI 4609 (Strategic Management) in Year 4.	Opportunity
3) Program Governance & Administration Recommendation: Appoint a Program Director once enrolment reaches a threshold (i.e., 500)	Opportunity
4) Program Requirements Recommendation: Expand modes of delivery to enhance accessibility and flexibility	Opportunity
5) Other Recommendation: Appoint a Tenured Faculty Member to Assurance of Learning	Opportunity
6) Other Recommendation: Track career outcomes of B. Com. and B. Acc. graduates	Opportunity
7) Other Recommendation: Conduct employer and student surveys to better understand the market	Opportunity

Recommendations

Concerns

1. Enrolment Recommendation: Mitigating enrolment shifts from B. Com. Accounting

Proposal

To ensure sustainable enrolment distribution and maintain the distinct value propositions of both the B.Com. Accounting concentration and the B. Acc. program, we propose a strategic approach to mitigate potential enrolment shifts. This initiative will focus on clearly differentiating program pathways, refining recruitment strategies, and monitoring enrolment trends to ensure that both programs attract and retain their intended student demographics without unintended internal migration.

Rationale

The Bachelor of Accounting (B.Acc.) program shares significant curriculum overlap with the B.Com. Accounting concentration, creating potential enrolment displacement, where students transfer from B.Com. to B.Acc. rather than expanding the overall student base. This could affect enrolment stability and resource allocation within the Sprott School of Business. By proactively addressing potential enrolment shifts, the B.Acc. can grow without negatively impacting the B.Com. Accounting concentration program, ensuring both degrees maintain strong, distinct student pipelines.

Following are some detailed discussions:

Clearly Differentiate the B.Acc. from B.Com.: Emphasize specialized accounting coursework, CPA pathway alignment, and data analytics integration as unique advantages of the B.Acc.

Strategically Position Both Programs: Maintain the B.Com. Accounting concentration as a flexible option for students seeking a broader business foundation, while positioning B.Acc. as the premier CPA-preparatory route.

Monitor Enrolment Trends: Track student movement between programs to assess enrolment impact and adjust marketing, advising, and course offerings accordingly.

Enhance External Recruitment Efforts: Focus recruitment on high school applicants and external transfers, reducing over-reliance on internal transitions from B.Com Accounting concentration.

Opportunities

2. Experiential Learning Recommendation: Introduce a new integrated capstone course in Year 3 to replace BUSI 4609 strategic management in Year 4

Proposal

Introduce a third-year integrated capstone course focusing on real-world applications, similar to the current BUSI 4609 Strategic Management course (a Capstone course for all B. Com. students at Sprott), but adjusted to the expected knowledge level of a **third-year B.Acc. student**.

Rationale

This adjustment will spread major experiential learning across Years 3 and 4, reducing final-year student overload. Specifically, Year 3 students would complete the new integrated capstone to consolidate business fundamentals, while a new BUSI 4020 Accounting Capstone in Year 4 would deepen their advanced accounting competencies. This staggered approach ensures better skills development, more balanced workloads, and enhanced learning.

Following are some detailed discussions:

Strengthened Real-World Application: Introducing more case work, group projects, simulation exercises, tax clinics and optional co-op placements provides students with hands-on experience mirroring professional accounting settings. By engaging in complex problem-solving early on, students develop essential skills such as critical thinking, effective communication and teamwork—all critical competencies in today’s accounting profession.

Progressive Skills Development: Introducing a Year 3 capstone provides students with earlier opportunities to integrate and apply knowledge from their previous exposure to business disciplines (accounting, finance, marketing, management, etc.) and fosters deeper learning by linking theory to real-life practice; this experience strengthens their foundations for an advanced capstone in Year 4.

Reduced Student Stress: Spreading the capstone experience over two academic years mitigates the heavy workload of preparing and presenting multiple major projects within the same academic year. A staggered approach reduces student stress levels while maintaining the academic rigor needed for both capstone courses.

Holistic Curriculum Design: With substantial experiential learning spread throughout the B. Acc. program, students can continuously refine their “soft skills” such as communication, leadership and collaboration, in parallel with technical competencies, such as tax return preparation, audit plan development, etc.

Optimized Student Experience: As students proceed through Years 3 and 4, they will benefit from consistent mentorship, feedback, and reflection exercises inherent in experiential learning. This scaffolded approach not only reinforces academic concepts, but also enhances overall student satisfaction, engagement, and career readiness.

3. Program Governance & Administration Recommendation: Appoint a program director once the enrolment reaches a threshold

Proposal

Once the program total enrolment reaches a significant threshold, such as a total of 500 B.Acc. students in Year 3, consideration should be given to appointing a Director to guide the program's continued success and growth.

Rationale

Once the program enrolment approaches its anticipated level of 500 B.Acc. students by Year 3, establishing a dedicated Director position will provide the focused leadership required to ensure cohesive program development, quality oversight, and strategic resource management. A Director can coordinate the increasing operational demands, liaise among faculty and staff, and maintain strong connections with external partners, thereby safeguarding the program's alignment with institutional goals and emerging industry standards. This dedicated role will help sustain the B.Acc.'s momentum and uphold its commitment to delivering advanced, in-depth accounting education that meets both employer expectations and professional requirements.

Following are some detailed discussions:

Dedicated Oversight and Leadership: With rising enrolments and increasingly complex curricular needs due to evolving CPA education requirements, a Director can focus exclusively on strategic planning, day-to-day administration and continuous development of the B. Acc. program, thereby ensuring that the program's unique objectives are addressed in decision-making.

Enhanced External Engagement: The B. Acc. program Director can serve as primary liaison with accounting firms, CPA Ontario and other key external stakeholders. By cultivating productive relationships and networking opportunities, the Director can facilitate co-op placements, build stronger advisory boards, and actively align the curriculum with evolving industry standards.

Streamlined Communication and Coordination: As the program scales, it will be essential to establish a single point of contact for addressing student concerns, to coordinate among diverse teaching areas (accounting, finance, marketing, etc.), and communicate information quickly and efficiently to both the Dean, the Associate Dean, and Undergraduate Curriculum Review Committee (CRC).

Continued Quality Assurance and Innovation: While the Associate Dean and CRC already oversee Assurance of Learning activities, a Director could focus on further improving the B. Acc. by identifying potential curriculum gaps, leading new pedagogical initiatives, and evaluating the impact of program changes. This directional engagement would ensure that B. Acc. course offerings are agile in responding to shifts in accounting standards and industry expectations.

Focused Student Support and Recruitment: A dedicated Director can collaborate closely with the Sprott Undergraduate Services Office in the areas of academic advising, career development, and engagement activities, helping to tailor these resources specifically to the needs of accounting students. Such collaboration would create a more positive student experience as well as strengthening recruitment and retention.

4. Program Requirements Recommendation: Expanding Modes of Delivery to Enhance Accessibility and Flexibility

Proposal

To meet the diverse needs of students, the Bachelor of Accounting (B.Acc.) program might want to consider exploring alternative delivery formats beyond the current in-person model. Offering flexible learning options can enhance accessibility, attract a broader student demographic, and align with evolving educational trends.

Rationale

Expanding the modes of delivery would increase accessibility, enhance student retention, and attract a more diverse applicant pool while maintaining the program's academic integrity and professional relevance. A phased pilot approach could help assess feasibility and demand before broader implementation.

Following are some detailed discussions:

Online and Hybrid (HyFlex) Learning: Introducing fully online and/or HyFlex (hybrid-flexible) options would accommodate students with work commitments, geographic constraints, or learning preferences for asynchronous study. This could be particularly beneficial for upper-year courses or electives.

Accelerated Pathways: Developing an intensive or fast-track option (e.g., year-round scheduling or condensed semesters) could appeal to highly motivated students or working professionals seeking a quicker route to CPA qualification.

Co-op and Work-Integrated Learning Flexibility: Allowing more flexible co-op schedules or virtual experiential learning opportunities could further support students balancing employment and studies.

Blended Learning for Core Courses: Incorporating blended (online + in-person) delivery for foundational courses could optimize resource use while maintaining in-person engagement where necessary.

Other Recommendations

Recommendation 1:

Appoint a Tenured Faculty Member for Assurance of Learning

To provide continuity and oversight, designate a tenured faculty member as the lead for AoL assessments. This individual would coordinate training, ensure consistent implementation of assessment rubrics and methods and serve as a long-term contact for curriculum refinement.

Recommendation 2:

Track Career Outcomes of B. Com. and B. Acc. Graduates

Develop a systematic approach to tracking and comparing the career paths of B. Com. and future B. Acc. graduates. These data will help determine distinct career trajectories or placement patterns, as well as inform enrolment forecasts, resource allocation, and program enhancements.

Recommendation 3:

Conduct Employer and Student Surveys to better understand the market

Survey current B. Com. (Accounting) students and employers (in public accounting, industry and government) to better understand their perceptions of a specialized B. Acc. degree. By identifying skills and competencies most valued by employers and specific to the two programs, the University can continually refine program offerings, tailor its curriculum to real-world market needs, and better communicate the increasing long-term value of its B. Acc. degree to all stakeholders.

Bachelor of Accounting
Unit Response to External Reviewers' Report & Implementation Plan
Programs Being Reviewed: New Undergraduate Program

Note: This document is forwarded to Senate, the Quality Council and posted on the Vice- Provost's external website.

Introduction & General Comments

Please include any general comments regarding the External Reviewers' Report.

[Sample Text: The Department/School/Institute was pleased to receive the Reviewers' very positive External Reviewers' report on [date]. This report was shared with our faculty and staff, and we are committed to the continual improvement of our programs to enhance the student, staff, and faculty experience. This document contains both a response to the External Reviewers' Report and an Implementation Plan (Section B) which have been created in consultation with the Dean(s).

For each recommendation one of the following responses must be selected:

Agreed to unconditionally: used when the unit agrees to and is able to take action on the recommendation without further consultation with any other parties internal or external to the unit.

Agreed to if additional resources permit: used when the unit agrees with the recommendation, however action can only be taken if additional resources are made available. Units must describe the resources needed to implement the recommendation and provide an explanation demonstrating how they plan to obtain those resources. In these cases, discussions with the Deans will normally be required and therefore identified as an action item.

Agreed to in principle: used when the unit agrees with the recommendation, however action is dependent on something other than resources. Units must describe these dependencies and determine what actions, if any, will be taken.

Not agreed to: used when the unit does not agree with the recommendation and therefore will not be taking further action. A rationale must be provided to indicate why the unit does not agree (no action should be associated with this response).

Calendar Changes

If any of the action items you intend to implement will result in calendar changes, please describe what those changes will be. To submit a formal calendar change, please do so using the Courseleaf system.

UNIT RESPONSE AND IMPLEMENTATION PLAN Programs Being Reviewed: Bachelor of Accounting Prepared by: Rebecca Renfroe, Associate Dean Student Success & Recruitment Undergraduate Programs – Sprott School of Business 11/03/2025					
External Reviewer Recommendation & Categorization	Unit Response: 1- Agreed to unconditionally 2- Agreed to if additional resources permit (describe resources) 3- Agreed to in principle 4- Not agreed to Rationales are required for categories 2, 3 & 4	Action Item	Owner	Timeline	Will the action described require calendar changes? (Y or N)
1) Mitigating enrolment shifts from B. Com. Accounting. (Concern)	Agreed to unconditionally	- Develop recruitment strategy designed to target potential BAcc students specifically, not previously recruited to Sprott. - Develop clear messaging & promotion exclusive to the BAcc and differentiates BCom Accounting as a flexible option. - Work with Recruitment Office to create a BAcc to MAcc pathway recruitment strategy for recruitment direct from high school. - Maintain pathway between BAcc to BCom to provide graduation option for students not meeting BAcc requirements. <i>Net new enrolment</i> will be our KPI to assess our success in BAcc recruitment.	Carleton Undergraduate Recruitment Office, AD Student Success & Recruitment UG	Fall 2025 recruitment campaign for BAcc developed Spring 2025	N

2) Introduce a new capstone course in Year 3 to replace BUSI 4609 (Strategic Management) in Year 4. (Opportunity)	Agreed to in principle This is an opportunity that we can explore once the program has started and we are able to assess student outcomes through AoL to determine the need for an earlier capstone course. As the program will roll out one year at a time, we can visit this as an option in the next 2-3 years.	- Will be brought to the UG Curriculum Review Committee (CRC) for information (2025). - If recommended, then CRC to discuss potential implementation (2026/2027).	UG Curriculum Review Committee	CRC meeting – Spring 2025 & Spring 2026	N
3) Appoint a Program Director once enrolment reaches a threshold (i.e., 500). (Opportunity)	Agreed to unconditionally	If we reach a threshold of 500, we will bring forward for discussion.	Dean, AD Student Success & Recruitment UG	Revisit when enrolment reaches 500	N
4) Expand modes of delivery to enhance accessibility and flexibility. (Opportunity)	Agreed to in principle 1000 & 2000 level BAcc courses already available in online version 3000 & 4000 level will be offered in-person to begin. As program grows, can determine if interest and capacity to offer additional online version.	- Gauge interest of students for online version in 2-3 years - May be some existing PBDA courses that have potential to be offered to the BAcc program. Will evaluate the courses to determine if they align and can be offered online.	AD Student Success & Recruitment UG	PBDA course review – 2025/26 Track interest for online courses in 2027	N
5) Appoint a Tenured Faculty Member to Assurance of Learning. (Opportunity)	Agreed to unconditionally Currently the UG CRC, comprised of faculty members, oversees the AoL process. Admin staff works with UG AD and CRC to ensure compliance. It would be beneficial to have a member of Accounting teaching area to oversees AoL specific to BAcc.	Continue process with UG CRC oversight of AoL and propose allocating Accounting team member as main contact for BAcc AoL.	AD Student Success & Recruitment UG Manager Strategy & Quality	CRC meeting - Spring 2025	N
6) Track career outcomes of B. Com. and B. Acc. graduates. (Opportunity)	Agreed to unconditionally	Currently track career outcomes for BCom through the Alumni Impact Survey. Will include BAcc graduates in this survey.	Manager Strategy & Quality, Director External Affairs	First BAcc alumni survey, one-year post graduation (2031)	N

		Continue to enhance engagement with alumni under current alumni engagement strategy			
7) Conduct employer and student surveys to better understand the market. (Opportunity)	Agreed to unconditionally	- Develop Co-op Employer Survey & Co-op Student Survey to complete post co-op term for feedback on employer needs and student skill development - Student survey currently conducted through the Employability Passport provides assessment & feedback on development of student employability skills - Continue to regularly engage with Accounting employers through individual & roundtable discussions to understand market demands & changes	AD Student Success & Recruitment UG, Co-op Office, Accounting Teaching Area	First co-op surveys for BAcc to launch 2027/28 (first co-op term completed) EP survey will run with program launching in 2025	N

Business
Dean's Response
Programs Being Reviewed: Bachelor of Accounting
Date: 11/03/25
Version:

Instruction

The table below has been pre-populated with the external reviewer recommendations. Please complete the Dean's Response column by providing a separate response to each of the external reviewers' recommendations, as required by the QAF (5.3.1).

Dean's Response Programs Being Reviewed: Bachelor of Accounting Prepared by: Howard Nemiroff, Dean Sprott School of Business	
External Reviewer Recommendation & Categorization	Dean's response A response is required for each recommendation listed.
1) Mitigating enrolment shifts from B. Com. Accounting. (Concern)	Agreed to unconditionally Develop recruitment strategy designed to target potential BAcc students specifically, and differentiate BCom Accounting as a flexible option. Maintain pathway between BAcc to BCom to provide graduation option for students not meeting BAcc requirements. <i>Net new enrolment</i> will be our KPI to assess our success in BAcc recruitment.
2) Introduce a new capstone course in Year 3 to replace BUSI 4609 (Strategic Management) in Year 4. Program. (Opportunity)	Agreed to in principle This is an opportunity that we can explore once the program has started and we are able to assess student outcomes through AoL to determine the need for an earlier capstone course. As the program will roll out one year at a time, we can visit this as an option in the next 2-3 years.

3) Appoint a Program Director once enrolment reaches a threshold (i.e., 500). (Opportunity)	Agreed to unconditionally If we reach a threshold of 500, we will bring forward for discussion.
4) Expand modes of delivery to enhance accessibility and flexibility. (Opportunity)	Agreed to in principle 1000 & 2000 level BAcc courses already available in online version. 3000 & 4000 level will be offered in-person to begin. As program grows, can determine if interest and capacity to offer additional online version.
5) Appoint a Tenured Faculty Member to Assurance of Learning. (Opportunity)	Agreed to unconditionally Currently the UG CRC, comprised of faculty members, oversees the AoL process. Admin staff works with UG AD and CRC to ensure compliance. It would be beneficial to have a member of Accounting teaching area to oversees AoL specific to BAcc.
6) Track career outcomes of B. Com. and B. Acc. graduates. (Opportunity)	Agreed to unconditionally Currently track career outcomes for BCom through the Alumni Impact Survey. Will include BAcc graduates in this survey. Will continue to enhance engagement with alumni under current alumni strategy.
7) Conduct employer and student surveys to better understand the market. (Opportunity)	Agreed to unconditionally Develop Co-op Employer Survey & Co-op Student Survey to complete post co-op term for feedback on employer needs and student skill development Continue student survey currently conducted through the Employability Passport for feedback on development of student employability skills Continue to regularly engage with Accounting employers through individual & roundtable discussions to understand market demands & changes

Curriculum Vitae - Sprott School of Business

Mohamed Al Guindy, PhD
Associate Professor - Tenured,
Sprott School of Business (Finance)
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AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrCID: <https://orcid.org/0000-0002-2395-4187>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Queen's University.

Master of Business Administration. Queen's University.

Master of Engineering. Queen's University.
Title: *Ranked 1st in the program.*

Bachelor of Engineering. University of Toronto.

B. EMPLOYMENT

Academic Appointments

Assistant Professor, Finance, Sprott School of Business, Carleton University (2017 - Present), Ottawa, Canada-Ontario.

Other Employment

Founder, Bay Financial Systems (2009 - 2011), Toronto, Canada-Ontario.

Financial Software Consultant, PureFacts Financial Systems (2007), Toronto, Canada-Ontario.

Business Computer Specialist, IBM Canada Ltd (2004 - 2005), Toronto, Canada-Ontario.

C. PROFESSIONAL HONOURS

2022: Research Achievement Award, Carleton University.
2020: Teaching Excellence Award, Carleton University Student Association.
2016: D.I. McLeod Fellowship, Smith School of Business, Queen's University.
2016: Queen's University 3-Minute Thesis: People's Choice Award, Queen's University.
2016: Queen's School of Business 3-Minute Thesis Competition, Smith School of Business, Queen's University.
2016: D.I. McLeod Research Assistantship, Smith School of Business, Queen's University.
2016: Applied FMA Award, Applied Financial Management Association Conference.
2015: Michael Durland Graduate Fellowship, Queen's University.
2015: D.I. McLeod Fellowship, Smith School of Business, Queen's University.
2015: Queen's School of Business 3-Minute Thesis Competition, Smith School of Business, Queen's University.
2015: Doctoral Student Travel Grant, American Finance Association.
2014: E. Gay Mitchell Graduate Fellowship in Finance, Queen's University.
2014: Michael Durland Graduate Fellowship, Queen's University.
2014: D.I. McLeod Fellowship, Smith School of Business, Queen's University.
2013: E. Gay Mitchell Graduate Fellowship in Finance, Queen's University.
2012: Richard J. Hand Graduate Bursary in Management, Queen's University.
2010: Dare to Dream New Venture Award, Queen's Centre for Business Venturing.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		4		4
Articles-in-Progress (All)		6		6

Publications in Conference Proceedings (Refereed)		1		1
Paper Presentations (Refereed)		10		10
Grants - Funded (both refereed and non-refereed)		13		13
Totals		34		34

Refereed Scholarly Publications

Articles in Refereed Journals

- Al Guindy, M., Naughton, J. P., & Riordan, R. (2023). The evolution of corporate twitter usage. *Journal of Business Finance and Accounting*. [A+]
Early view with DOI
- Al Guindy, M. (2022). Fear and hope in financial social networks: Evidence from COVID-19. *Finance Research Letters*, 46 (A), 102271. [A]
Available online 3 July 2021, 102271 In Press, Corrected Proof. Member chose to count for 2022.
- Al Guindy, M. (2021). Cryptocurrency price volatility and investor attention. *International Review of Economics and Finance*, 76, 556-570. [A]
- Al Guindy, M. (2021). Corporate Twitter use and cost of equity capital. *Journal of Corporate Finance*, 68, 101926. [A+]

Articles in Refereed Conference Proceedings

Full Paper

- Al Guindy, M. (2022). Tweeting within and outside of market hours and price discovery. *Financial Management Association*.
- Al Guindy, M. (2017). Is Corporate Tweeting Informative or Is It Just Hype? Evidence from the SEC Social Media Regulation? *Financial Management Association Conference*.
- Al Guindy, M. (2016). Corporate Twitter Use and Cost of Capital. *Financial Management Association Conference*.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

- Al Guindy, M. (2022). *Tweeting within and outside of market hours and price discovery*. Financial Management Association, Dubai, United Arab Emirates.
- Al Guindy, M. (2021). *Tweeting within and outside of market hours and price discovery*. Financial Management Association, Virtual, Virtual.
- Al Guindy, M. (2021). *The Social Internetwork and Stock Returns*. Society of Financial Studies Cavalcade Conference, Virtual, Virtual.
- Al Guindy, M. (2021). *The Social Internetwork and Stock Returns*. Northern Finance Association Conference, Virtual, Virtual.
- Al Guindy, M. & Riordan, R. (2020). *The Social Internetwork and Stock Returns*. Toronto Fintech Conference, Virtual, Virtual.
- Al Guindy, M. & Riordan, R. (2020). *The Social Internetwork and Stock Returns*. Financial Management Association Conference, Virtual, Virtual.
Description: Best Paper Award semi-finalist),
- Al Guindy, M. & Riordan, R. (2020). *The Social Internetwork and Stock Returns*. European Finance Association Conference, Virtual, Virtual.
- Al Guindy, M. (2019). *Cryptocurrency Price Volatility and Investor Attention*. Southern Finance Association, Jacksonville, Florida.
- Al Guindy, M. (2019). *Giving Content to Investors' Tweets: Financial Tweeting and Daily Stock Returns*. Financial Management Association (FMA) Conference, New Orleans, Louisiana.
- Al Guindy, M. (2019). *Cryptocurrency Price Volatility and Investor Attention*. Southampton Cryptocurrency Conference, London, United Kingdom.
- Al Guindy, M. (2018). *The rise of Fintech. Trends and Opportunities in the FinTech Sector: A Canada-Africa Perspective*. Sprott Centre for African Research and Business, Ottawa, Canada-Ontario.
- Al Guindy, M. (2017). *Is Corporate Tweeting Informative or Is It Just Hype? Evidence from the SEC Social Media Regulation?* Financial Management Association Conference, Boston, Massachusetts.
Description: Best Paper Award semi-finalist)
- Al Guindy, M. (2017). *Is Corporate Tweeting Informative or Is It Just Hype? Evidence from the SEC Social Media Regulation?* Financial Risks International Forum, Paris, France.
Description: 2017 Financial Risks International Forum (FinTech)
- Al Guindy, M., Boguth, O., & Martineau, C. (2017). *Shaping Expectations and Coordinating Attention: The Unintended Consequences of FOMC Press Conferences*. Northern Finance Association Conference, Halifax, Canada-Nova Scotia.
- Al Guindy, M. (2016). *Corporate Twitter Use and Cost of Capital*. Applied Financial Management Association, NY, New York.
- Al Guindy, M. (2016). *Corporate Twitter Use and Cost of Capital*. World Finance Conference, NYC, New York.
- Al Guindy, M. (2016). *Corporate Twitter Use and Cost of Capital*. Financial Management Association Conference, Las Vegas, Nevada.

Description: Best Paper Award semi-finalist

Al Guindy, M. (2016). *Is Corporate Tweeting Informative or Is It Just Hype? Evidence from the SEC Social Media Regulation?* Northern Finance Association Conference, Mt. Tremblant, Canada-Quebec.

Al Guindy, M. (2014). *Regulation Fair Disclosure and the Adoption of new Disclosure Technologies: Evidence from Twitter*. Washington University at St. Louis, St. Louis, Missouri.

Other Presentations

Invited Lecture

2022: Sprott MBA seminar series. Why do I care about Artificial Intelligence as a General Manager

2020: Queen's University Master of Financial Innovation & Technology, Kingston, Canada-Ontario.

Presentation

2023: Carleton University. Sprott Student Investment Fund. Should I still invest in Bitcoin?

2023: Carleton University. Innovation Hub. Emerging Technologies in Finance

2023: Carleton University. Carleton Data Day 9.0, The Social Internetnetwork

2022: Southern Denmark University. The Social Internetnetwork and Stock Returns

2021: Queen's University Master of Financial Innovation & Technology.

2020: Carleton University Institute of Data Science Distinguished Speaker Series, Ottawa, Canada-Ontario. Cryptocurrency Prices and Investor Attention: A Big Data Approach

2019: Institute for Data Science, Ottawa, Canada-Ontario. Speaker/Panelist: Social Media in Financial Markets.

2018: Cubist Systematic Strategies, NYC, New York. Research seminar: Regulation of Social Media in Financial Markets. Cubist Systematic Strategies (Quantitate investment arm of Point72 Asset Management L.P.).

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 1 of 2]: Al Guindy, M. Governor's Award (\$30,000.00 Pending), Principal Investigator, Bank of Canada. [Status: Pending]

2024 [Year 1 of 6]: Al Guindy, M. Insight Grant (\$327,055.00 Pending), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Pending]

2023 [Year 2 of 4]: Al Guindy, M. John R. Evans Leaders Fund (\$18,750.00), Principal Investigator, Canada Foundation for Innovation. [Status: Funded]

2023 [Year 2 of 3]: Al Guindy, M. Insight Development Grant (\$19,740.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 3]: Al Guindy, M. Ontario Research Fund's Small Infrastructure Fund (ORF SIF) (\$25,000.00), Principal Investigator, Ontario government and Canada Foundation for Innovation. [Status: Funded]

2023 [Year 1 of 2]: Al Guindy, M. Governor's Award, Principal Investigator, Bank of Canada. [Status: Not Funded]

2022 [Year 1 of 3]: Al Guindy, M. Insight Development Grant (\$19,740.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 4]: Al Guindy, M. John R. Evans Leaders Fund (\$18,750.00), Principal Investigator, Canada Foundation for Innovation. [Status: Funded]

2022: Al Guindy, M. Multidisciplinary Research Catalyst Fund (\$0.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2022: Al Guindy, M. Research Achievement Award (\$15,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021 [Year 3 of 3]: Al Guindy, M. Insight Development Grant (\$16,322.00 of a total grant amount of \$48,966.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). The Social Internetnetwork. [Status: Funded]

2020 [Year 2 of 3]: Al Guindy, M. Insight Development Grant (\$16,322.00 of a total grant amount of \$48,966.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). The Social Internetnetwork. [Status: Funded]

2020 [Year 2 of 2]: Al Guindy, M. New Frontiers Research Fund- Exploration, Principal Investigator, Canada Research Coordinating Committee SSHRC. [Status: Not Funded]

2020: Al Guindy, M. CU COVID-19 Rapid Research Response Grants (\$24,787.00), Principal Investigator, PRI-Carleton University. Carleton University, Dean's Office - Business and Carleton University, Vice-President (Rsch & Int'l). [Status: Funded]

2019 [Year 1 of 2]: Al Guindy, M. New Frontiers Research Fund- Exploration, Principal Investigator, Canada Research Coordinating Committee SSHRC. [Status: Not Funded]

2019 [Year 1 of 3]: Al Guindy, M. Insight Development Grant (\$16,322.00 of a total grant amount of \$48,960.00), Principal Investigator, GOV-Social

Sciences and Humanities Research Council (SSHRC). The Social Internetwork. [Status: Funded]

2019: Al Guindy, M. SSHRC Explore (\$9,960.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019: Al Guindy, M. Development Grants - Explore (\$9,960.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2018: Al Guindy, M. Start-up Funds (\$20,000.00), Principal Investigator, Carleton University, Dean's Office - Arts & Social. [Status: Funded]

2018: Al Guindy, M. Start-up Funds (\$10,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2022: Financial Management Association Global Conference, Dubai, United Arab Emirates. "Remotely productive: the efficacy of remote work for executives" by Ran Duchin and Denis Sosyura.

2022: World Finance Conference, Turin, Italy. "The geography of investor attention" by Stephano Mengoli, Marco Pagano, Pierpaolo Pattitoni.

2022: European Finance Association. Mergers under the microscope: analyzing conference call transcripts

2020: Toronto Fintech Conference 2020, Toronto, Canada-Ontario. Toronto Fintech Conference 2020, Toronto, Canada. Discussant: "Liquid speed: A micro-burst fee for low-latency exchanges" by Michael Brolley and Marius Zoican.

2019: Southern Finance Association, Orlando, Florida. "Decentralized Efficiency? Arbitrage in Bitcoin Markets" by Sinan Krueckeberg and Peter Scholz.

2017: Financial Management Association, Boston, Massachusetts. Discussant: "The Ostrich in Us: Selective Attention To Financial Accounts, Income, Spending, and Liquidity" by Michaela Pagel and Arna Olafsson.

2016: World Finance Conference, Manhattan, New York. "Cognition, emotion and perceived values in crowd funding decision making" by Krystallia Moysidou.

2014: European Financial Management Association Conference, Maastricht, Netherlands. "What Happens when Gamblers Get their Hands on Money? Lottery-Type Stocks at the Turn of the Month" by Yun Eric Meng, Christos Pantzalis.

2014: Northern Finance Association, Ottawa, Canada-Ontario. "Do Analysts' Preferences Affect Corporate Policies?" by Francois Degeorge, Francois Derrien, Ambrus Kecskes, Sebastien Michenaud.

2013: Northern Finance Association, Quebec, Canada-Quebec. "The Informational Content of the Loan Market" by Claudia Champagne, Stéphane Chrétien, Frank Coggins.

Academic Conference: Panelist

2022: Financial Management Association (FMA) Conference, Dubai, United Arab Emirates.

2019: Institute for Data Science, Carleton University, Ottawa, Canada-Ontario. Social Media in Financial Markets

2018: Financial Management Association Conference, San Diego, California. Panelist: Social Media in Financial Markets, Expert Panel

2016: Financial Management Association, Doctoral Consortium, Las Vegas, Nevada. Is Corporate Tweeting Informative or Is It Just Hype? Evidence from the SEC Social Media Regulation?

Chair: Conference / Track / Program

2023: Hawaiiin Accounting Research Conference.

2019: Southern Finance Association, Orlando, Florida.

2019: Southern Finance Association, Orlando, Florida. Session Leader: Social Media in Finance, Research Overview Session/Tutorial

2016: World Finance Conference, Manhattan, New York. "Cognition, emotion and perceived values in crowd funding decision making" by Krystallia Moysidou.

2015: Smith School of Business, Finance & Accounting PhD research seminar, Kingston, Canada-Ontario.

Invited Lecture

2022: Sprott MBA seminar series. Why do I care about Artificial Intelligence as a General Manager

2020: Queen's University Master of Financial Innovation & Technology, Kingston, Canada-Ontario.

Other Professional Service Activities

2023: Financial Management Association. Conference Session Organizer, Session Chair

2014: Queen's Graduate Consortium, Kingston, Canada-Ontario. Conference Organizer

Reviewer: Ad Hoc Reviewer for a Journal

2024: Journal of Accounting and Public Policy.

2024: International Review of Economic Analysis.

2024: British Accounting Review. British Accounting Review (FinTech special Issue)

2024: Financial Review.

2024: Financial Analysts Journal.

2024: Journal of Corporate Finance.

2023: Journal of Business Finance & Accounting.

2022: Financial Analysts Journal.

2022: Journal of International Financial Markets, Institutions & Money.

2022: European Journal of Finance.

2022: Journal of Behavioural Finance.

2022: Journal of Banking and Finance.

2021: Finance Research Letters.

2020: Quarterly Journal of Finance.

2019: The Economic Journal.

2019: Information Systems Research Journal. Fintech special edition

2018: Information Systems Research Journal. Fintech special edition 2018

Reviewer: Conference Paper

2023: Financial Management Association, Nashville, Tennessee. "Investor relations, information asymmetry and market value", by Vineet Agarwal, Xijuan Bellotti, Richard J. Taffler, Elly A. Nash.

2019: Financial Management Association, New Orleans, Florida.

Scholarly Work in Progress

Working Papers

Al Guindy, M. & Riordan, R. (2023). "The Social Internetwork and stock returns."
Description: In preparation for submission at a leading finance journal.

Al Guindy, M. (2023). "Tweeting within and outside of market hours and price discovery," targeted for Accounting and Finance.
Description: Green light status at the 2022 WFC Finance Shark Tank Competition; Invited for submission at Accounting & Finance (ranked A in Sprott Journal quality list)

Al Guindy, M. & Foley, S. (2023). "Identifying geographical and textual characteristics of financial tweeting: An explorative study of financial tweeting in the USA and Australia."
Description: Under review

Al Guindy, M., Naughton, J., & Riordan, R. (2023). "The Chilling Effect of Regulation FD: Evidence from the SEC Endorsement of Social Media."
Description: Under review

Al Guindy, M. (2020). "Social Learning in Economic Networks."

Dionisi, A. & Al Guindy, M. (2019). "Hashtag activism and its resistance: An examination of #MeToo on Twitter."

Al Guindy, M. (2018). "Giving Content to Investors' Tweets: Financial Tweeting and Daily Stock Returns."

Al Guindy, M., Naughton, J., & Riordan, R. (2018). "The Chilling Effect of Regulation FD: Evidence from Twitter."
Description: Winner of \$15,000 CFGR Award

Al Guindy, M. (2018). "Rewriting History: Does the Public Information Record Change Prior to Corporate Events? Evidence from Wikipedia updates."

Al Guindy, M. (2018). "Do Markets Respond to Graphical Disclosure? Evidence from Artificial Intelligence."

Al Guindy, M. (2018). "Cryptocurrency Prices and News Around the World."

Al Guindy, M. (2018). "Robo News in Financial Markets."

Al Guindy, M., Riordan, R., Brogaard, J., & Naughton, J. (2017). "Algorithmic Trading and Fundamental Information."

Al Guindy, M. & Riordan, R. (2017). "The Social Internetwork: Information Spill-over Through Firms' Connections on Social Media.."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI5906	Special Topics	0.25	23	Main	100%
2023/Fall	FINA5501	Financial Management	0.25	24	Main	100%

2023/Fall	FINA5501	Financial Management	0.25	15	Main	100%
2023/Fall	BUSI5906	Special Topics	0.25	14	Main	100%
2023/Fall	BUSI3502	Principles of Investments	0.5	52	Main	100%
2022/Fall	BUSI5906	Special Topics	0.25	19	Main	100%
2022/Fall	BUSI2504	Essentials of Business Finance	0.5	86	Main	100%
2022/Winter	BUSI5906	Special Topics	0.25	5	Main	100%
2021/Fall	BUSI5906	Special Topics	0.25	21	Main	100%
2021/Fall	BUSI3502	Principles of Investments	0.5	39	Main	100%
2021/Fall	BUSI3502	Principles of Investments	0.5	46	Main	100%
2021/Winter	BUSI2504	Essentials of Business Finance	0.5	90	Main	100%
2021/Winter	BUSI2504	Essentials of Business Finance	0.5	92	Main	100%
2020/Fall	BUSI5906	Special Topics	0.25	26	Main	100%
2020/Fall	BUSI3502	Principles of Investments	0.5	46	Main	100%
2020/Fall	BUSI3502	Principles of Investments	0.5	50	Main	100%
2020/Winter	BUSI2504	Essentials of Business Finance	0.5	61	Main	100%
2020/Winter	BUSI2504	Essentials of Business Finance	0.5	76	Main	100%
2019/Fall	BUSI3502	Principles of Investments	0.5	40	Main	100%
2019/Fall	BUSI3502	Principles of Investments	0.5	54	Main	100%
2019/Winter	BUSI2504	Essentials of Business Finance	0.5	82	Main	100%
2019/Winter	BUSI2504	Essentials of Business Finance	0.5	69	Main	100%
2018/Fall	BUSI2504	Essentials of Business Finance	0.5	86	Main	100%
2018/Winter	BUSI2504	Essentials of Business Finance	0.33	43	Main	72%
2018/Winter	BUSI2504	Essentials of Business Finance	0.12	20	Main	24%
2018/Winter	BUSI2504	Essentials of Business Finance	0.38	63	Main	76%
2018/Winter	BUSI2504	Essentials of Business Finance	0.17	17	Main	28%
2017/Fall	BUSI2504	Essentials of Business Finance	0.06	7	Main	11%
2017/Fall	BUSI2504	Essentials of Business Finance	0.44	79	Main	89%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2022-2023: Foad Haji Mohammad

2020-2021: MSc in Computer Science: Raisul Rashu

2020-2021: MSc in Computer Science: Khadija Osman

PhD. Thesis Committees:

2023-2024: Syed Ali

External Committees

Thesis Assignments

PhD. Thesis Committees:

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2022-2023 – 2023-2024: Early Career Committee (Co-Chair)

H. OTHER

Student Recruitment/Outreach Activities

2019 - CUin2 Carleton University High School Partners' Conference : Talk Title: "Should I tell my parents to buy Bitcoin?".

Other Activities

2016 - Session Leader, Big Data & Machine Learning, Queen's Graduate Consortium

Student Recruitment/Outreach Activities

2012 - PhD representative, Graduate Student Recruitment, Queen's School of Business

Selected Media Appearances: Online

2018 - Yahoo! Finance. How Fake News is Affecting Investors

2018 - Centretown News. Bank of Canada Museum opens e-money exhibit to educate Canadians

Selected Media Appearances: Print

2017 - Investment Relations (IR) Magazine. Tweeting Tweaks Trading

2017 - American Association of Individual Investors. Tweeting Associated with a Slight Return Boost

2017 - Cision Whitepaper, Social Media Monitoring is Critical for Investor Relations

2016 - Smith Business Insight, Queen's University. Hashtag Stock Market Boost

Selected Media Appearances: Online

2019 - Harvard Law School Forum on Corporate Governance and Financial Regulation: The Chilling Effect of Regulation FD: Evidence from Twitter

2019 - Canadian Securities Institute Research Foundation. The Answer is via Social Media

2020 - Does it Fit? Tweeting on Monetary Policy and Central Bank Communication : The European Money and Finance Forum.

Student Experience Activities

2021 - Sprott Business Students' Society, Investing in Cryptocurrencies

2021 - Sprott Finance Students' Association (SFSA), Carleton FinTech Club (CFC) Future of Finance Panel

Selected Media Appearances: Print

2023 - Despite the volatility, the allure of riches keeps many invested in Bitcoin : Capital Current

2023 - Understanding social media's influence on the economy : Ottawa Business Journal, 2023 Business Growth Survey Report. Re-print of Alysha A. Cunningham's story

2023 - Canada can't afford to 'miss the boat' on blockchain industry, says Bloc MP Lemire : The Hill Times

Selected Media Appearances: Online

2024 - Does Social Media Influence More Than Just Influencers? : Podcast - the Talking Raven April 9, 2024

Credentials

Curriculum Vitae - Sprott School of Business

Troy Anderson, PhD
Associate Professor, Teaching Stream - Tenured, 2015
Sprott School of Business (Management and Strategy)
Telephone: 613-520-2600 x3025
Email: troy.anderson@carleton.ca
AACSB Qualification: Practice Academic (PA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. McGill University.
Master of Business Administration. Pepperdine University.
Bachelor of Arts. Brigham Young University.

B. EMPLOYMENT

Academic Appointments

Director, Sprott Centre for African Research and Business, Sprott School of Business, Carleton University (2017 - Present), Ottawa, Canada.
Instructor III, Sprott School of Business, Carleton University (2008 - Present), Ottawa, Canada-Ontario.

Other Employment

N/A, C3 Gateways Services (2002 - 2005), Montreal, Canada-Quebec.
N/A, Hachette Filipacchi Presse (1993 - 1998), Paris, France.
N/A, Lagardère Groupe (1992 - 1993), Paris, France.
N/A, La Cinq Television Network (1991 - 1992), Paris, France.
N/A, United Airlines (1986 - 1987), Anchorage, Alaska.
N/A, Dowl Engineers (1982 - 1987), Anchorage, Alaska.

C. PROFESSIONAL HONOURS

2019: Yidan Prize, Yidan Prize Foundation.
2017: David Gillingham Award, Network of International Business Schools.
2014 – 2015: Capital Educator's Award, Ottawa Network for Education.
2013: Capital Educator's Award Finalist, Ottawa Network for Education.
2013: Teaching Achievement Award, Carleton University.
2012: Capital Educator's Award, Ottawa Network for Education.
2007 – 2008: Postdoctoral Fellow, Desautels Faculty of Management, McGill University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		1		1
Articles-in-Progress (All)		2		2
Grants - Funded (both refereed and non-refereed)		2		2
Grants - Pending (both refereed and non-refereed)		1		1
Totals		6		6

Refereed Scholarly Publications

Articles in Refereed Journals

Venis, R. A., Taylor, V., Sumayani, P., Laizer, M., Anderson, T., Basu, O.D. (2022). Towards a participatory framework for improving water & health outcomes: A case study with Maasai women in rural Tanzania. *Social Science and Medicine*, 301, 114966. [A+]

Choi, J. N., Anderson, T., & Veillette, A. (2009). Contextual Inhibitors of Employee Creativity in Organizations: The Insulating Role of Creative Ability. *Group and Organization Management*, 34 (3), 330-357. [A]

Anderson, T., Jaeger, A., & Ma, Z. (2002). Individual Perception, Bargaining Behavior, And Negotiation Outcomes: A Comparison across Two Countries. *International Journal of Cross Cultural Management*, 2 (2), 171-184. [B]

Chapters in Edited Books

Anderson, T., Jaeger, A., & Ma, Z. (2002). The Influence of Personality on Negotiation -- A Canada-France Comparison. In Scholz, Christian, Zentes, Joachim (Hrsg.) (Ed.), *Strategic Management: A European Approach* (pp. 263-282). Springer. [Status: Published]

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Anderson, T. & Basu, O. (2016). *Water recovery and conservation in rural Tanzania*. World Water Congress, Brisbane, Australia- QLD.

Anderson, T. & Basu, O. (2015). *Rainwater Harvesting in Rural Tanzania*. Canadian Water and Wastewater Association Annual Conference, Whistler, Canada-British Columbia.

Anderson, T. & Jaeger, A. (2002). *Cultural Change and Chinese- American Dyad Negotiation: A Research Model*. Administrative Sciences Association of Canada (ASAC), Winnipeg, Canada-Manitoba.

Other Presentations

Presentation

2017: Sprott Seminar Series, Ottawa, Canada-Ontario. Tanzania Water Project

Contract or Other Research

Research Grants and Awards

Grants

2023 [Year 2 of 2]: Anderson, T. Insight Development Grant (\$74,890.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 2 of 2]: Anderson, T. Partnership Engage Grant (\$12,499.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 2]: Anderson, T. Insight Development Grant (\$74,890.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 1 of 2]: Anderson, T. Partnership Engage Grant (\$12,499.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021: Anderson, T. Donations, Principal Investigator, PRI-Carleton University. [Status: Pending]

2021: Anderson, T. Community Support, Multiculturalism, and Anti-Racism Initiatives Program (\$175,410.00 Not Funded), Principal Investigator, Canadian Heritage. [Status: Not Funded]

2019: Anderson, T. Development Impact Window- Contribution Agreement (\$94,933.00 Not Funded), Principal Investigator, Global Affairs Canada. [Status: Not Funded]

2019: Anderson, T. Project (\$949,933.00 Not Funded), Principal Investigator, Tembo Trust. [Status: Not Funded]

2019: Anderson, T. Insight Development Grant (\$64,506.00 Not Funded), Co-Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2017: Anderson, T. International Youth Internship Program, Collaborator, Global Affairs Canada. Responsible for South African component. [Status: Not Funded]

2017: Anderson, T., Basu, O., & Rod, M., Ceramic Water Filter project (\$100,000.00 Not Funded), Co-Principal Investigator, United States Agency for International Development. Ceramic Water Filter project. With Onita Basu and Michel Rod, partnered with SWCEA, and SafeWaterNow. \$100,000. Program Cancelled. [Status: Not Funded]

2017 [Year 3 of 3]: Anderson, T. Sponsored Research Donation, Collaborator, Donation. [Status: Funded]

2016: Anderson, T., Basu, O., & Taylor, V., JPI Water Grant (\$150,000.00 Not Funded), Principal Investigator, Joint Programming Initiatives (European Union). Small-Scale Agricultural Sustainability in Northern Tanzania. [Status: Not Funded]

2016 [Year 2 of 3]: Anderson, T. Canadian Partnerships Small Grants (\$39,585.00 of a total grant amount of \$39,588.00), Principal Investigator, GOV-International Development Research Centre (IDRC). From Buckets to Rainbarrels. [Status: Funded]

2016 [Year 3 of 3]: Anderson, T. Canadian Partnerships Small Grants (\$39,585.00 of a total grant amount of \$39,588.00), Principal Investigator, GOV-International Development Research Centre (IDRC). From Buckets to Rainbarrels. [Status: Funded]

2016 [Year 2 of 3]: Anderson, T. Sponsored Research Donation, Collaborator, Donation. [Status: Funded]

2015 [Year 2 of 2]: Crocker, S., Herbert-Copley, M., Philips, S., Hebb, T., Anderson, T., F. Brouard, K. Graham CU NEXT: Carleton University as an Agent of Change for Social Innovation and Entrepreneurship (\$250,000.00 Not Funded), Co-Principal Investigator, PRI-Carleton University. Fueling Social Innovation & Entrepreneurship in HigherEducation RECODE Transformation Fund 2015-2016 (2 years) for \$500,000 for a Carleton University proposal. [Status: Not Funded]

2015 [Year 1 of 3]: Anderson, T. Canadian Partnerships Small Grants (\$39,585.00 of a total grant amount of \$118,755.00), Principal Investigator, GOV-International Development Research Centre (IDRC). From Buckets to Rainbarrels. [Status: Funded]

2015 [Year 1 of 3]: Anderson, T. Sponsored Research Donation, Collaborator, Donation. [Status: Funded]

2014 [Year 1 of 2]: Crocker, S., Herbert-Copley, M., Philips, S., Hebb, T., Anderson, T., F. Brouard, K. Graham CU NEXT: Carleton University as an Agent of Change for Social Innovation and Entrepreneurship (\$250,000.00 Not Funded), Co-Principal Investigator, PRI-Carleton University. Fueling Social Innovation & Entrepreneurship in HigherEducation RECODE Transformation Fund 2015-2016 (2 years) for \$500,000 for a Carleton University proposal. [Status: Not Funded]

2014: Anderson, T., Duxbury, L., & Gover, L., Initiative to diagnose forces and barriers to change, identify change opportunities and change plan (\$157,000.00), GOV-Service Alberta. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Moderator / Facilitator

2014: Algoma University, Sault Ste. Marie, Canada-Ontario. Conference Speaker, Workshop Facilitator - International Education in North American Context: Building for Success.

2010: Academy of Management, Montreal, Canada-Quebec. Artistic Passion Igniting Workplace Action Spaces for Social Creativity. With Nancy J. Adler.

2010: Academy of Management, Montreal, Canada-Quebec. Daring to Care: Scholarship the Supports the Courage of our Convictions. With Nancy J. Adler.

2010: Academy of Management, Montreal, Canada-Quebec. Leadership Insight: Contemplative Reflection through Art, Music, and Contemplative Reflection. With Nancy J. Adler & Andre Delbecq.

Reviewer: Ad Hoc Reviewer for a Journal

2010 – 2011: Journal of Occupational and Organizational Psychology.

Scholarly Work in Progress

Papers Under Review

Anderson, T. & Choi, J.N. (2017). "In or Out: Network Position and Perceptions of Individual Creativity," 1st revise and resubmit.
Description: Manuscript submitted for publication. First review.

Anderson, T. & Choi, J. N. (2017). "Individual Creativity in Organizations: Creative Problem Type and Effective Creative Behavior," Revised and resubmitted.
Description: Manuscript submitted for publication. Revise & Resubmit.

Working Papers

Anderson, T. & Choi, J. N. (2022). "In or Out: Network Position and Perceptions of Individual Creativity."

Anderson, T. & Choi, J. N. (2022). "Individual Creativity in Organizations: Creative Problem Type and Effective Creative Behavior."

Anderson, T., Assudani, R., & Manolis, C. (2017). "Study on the interaction effects of cognitive style and personality; effect of job tenure and education on creative self-efficacy; and effect of self-efficacy relative to personality and cognitive style."
Description: Large data set collected, analysis in progress.

Butt, A., Anderson, T., & Choi, J. N. (2017). "Impact of emotion and gender in dyadic negotiation."
Description: Data collected: 18,000 data points. Paper in progress.

Anderson, T. & Choi, J.N. (2017). "Context management behavior as a mediator of problem type and evaluations of creative performance."
Description: Empirical paper based on theoretical paper above (Individual Creativity in organizations: Creative problem type and effective creative behavior). Data collected and analyzed, paper in progress

Anderson, T., Stevenson, M., & Duxbury, L. (2017). "Organizational Climate and Perceived Readiness for Change."
Description: Data collected and analyzed, paper in Progress

Anderson, T. & Basu, O. (2017). "An interdisciplinary approach to pedagogy in an international context."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%

2023/Winter	BUSI4117	Creative Thinking	0.5	10	Main	100%
2023/Winter	BUSI2101	Organizational Behaviour	0.25	114	Main	50%
2023/Winter	BUSI4117	Creative Thinking	0.5	12	Main	100%
2022/Fall	BUSI4117	Creative Thinking	0.5	12	Main	100%
2022/Fall	BUSI4117	Creative Thinking	0.5	10	Main	100%
2022/Fall	BUSI2101	Organizational Behaviour	0.25	121	Main	50%
2022/Winter	BUSI4117	Creative Thinking	0.5	7	Main	100%
2022/Winter	BUSI4117	Creative Thinking	0.5	7	Main	100%
2022/Winter	BUSI4111	Training and Development	0.25	10	Main	50%
2022/Winter	BUSI2101	Organizational Behaviour	0.25	79	Main	50%
2021/Fall	BUSI4117	Creative Thinking	0.5	7	Main	100%
2021/Fall	BUSI2101	Organizational Behaviour	0.25	91	Main	50%
2021/Fall	BUSI4117	Creative Thinking	0.5	7	Main	100%
2021/Fall	BUSI4111	Training and Development	0.25	10	Main	50%
2021/Winter	BUSI4117	Creative Thinking	0.5	10	Main	100%
2021/Winter	BUSI4117	Creative Thinking	0.25	5	Main	50%
2021/Winter	BUSI4111	Training and Development	0.25	20	Main	50%
2021/Winter	BUSI2101	Organizational Behaviour	0.25	174	Main	50%
2020/Fall	BUSI4117	Creative Thinking	0.5	11	Main	100%
2020/Fall	BUSI4117	Creative Thinking	0.25	5	Main	50%
2020/Fall	BUSI4111	Training and Development	0.25	20	Main	50%
2020/Fall	BUSI2101	Organizational Behaviour	0.25	165	Main	50%
2020/Winter	BUSI2101	Organizational Behaviour	0.25	95	Main	50%
2020/Winter	BUSI4111	Training and Development	0.25	10	Main	50%
2020/Winter	BUSI3117	Developing Creative Thinking	0.25	21	Main	100%
2019/Fall	BUSI4111	Training and Development	0.25	10	Main	50%
2019/Fall	BUSI3117	Developing Creative Thinking	0.25	21	Main	100%
2019/Fall	BUSI3117	Developing Creative Thinking	0.5	19	Main	100%
2019/Fall	BUSI2101	Organizational Behaviour	0.25	88	Main	50%
2019/Winter	BUSI4111	Training and Development	0.25	11	Main	50%
2019/Winter	BUSI3117	Developing Creative Thinking	0.25	13	Main	100%
2019/Winter	BUSI2101	Organizational Behaviour	0.25	77	Main	50%
2018/Fall	BUSI3117	Developing Creative Thinking	0.25	13	Main	100%
2018/Fall	BUSI3117	Developing Creative Thinking	0.5	15	Main	100%
2018/Fall	BUSI4111	Training and Development	0.25	11	Main	50%
2018/Fall	BUSI2101	Organizational Behaviour	0.25	119	Main	50%
2018/Winter	BUSI4111	Training and Development	0.25	11	Main	50%

2018/Winter	BUSI3117	Developing Creative Thinking	0.5	8	Main	100%
2018/Winter	BUSI2101	Organizational Behaviour	0.25	64	Main	50%
2017/Fall	BUSI4111	Training and Development	0.25	11	Main	50%
2017/Fall	BUSI3117	Developing Creative Thinking	0.5	30	Main	100%
2017/Fall	BUSI2101	Organizational Behaviour	0.25	117	Main	50%
2017/Winter	BUSI2101	Organizational Behaviour	0.5	201	Main	100%
2017/Winter	BUSI4111	Training and Development	0.5	23	Main	100%
2017/Winter	BUSI3117	Developing Creative Thinking	0.5	8	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2015-2016: Co-Supervisor, Neil Voorneveld

2013-2014: External Examiner, Micheal Gregoriev

2013-2014: External Examiner, Chau Lei

2012-2013: External Examiner, John Di Palma

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Curriculum Vitae - Sprott School of Business

Jinsun Bae, PhD

Assistant Professor - Preliminary - Tenure Track

Sprott School of Business (International Business)

Telephone:

Email: jinsun.bae@carleton.ca

AACSB Qualification: Scholarly Academic (SA) , Participation: Participating

OrcID: <https://orcid.org/0000-0002-2354-7362>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Copenhagen Business School.

Title: *Producing Garments for Global Markets, Corporate social responsibility in Myanmar's export garment industry 2011–2015.*

Master of Science. Lund University.

Bachelor of Science. Georgetown University.

B. EMPLOYMENT

Academic Appointments

Assistant Professor in International Business, Sprott School of Business, Carleton University (November, 2020 - Present), Ottawa, Canada-Ontario.

Research Partner, Seoul National University (April, 2018 - May, 2021), Seoul, Republic of Korea. Globalizing Actors of Korean Multinationals Project, hosted at the Department of Sociology

Visiting Researcher, Cornell University (January, 2020 - December, 2020), Ithaca, New York. Department of International Comparative Labor, School of Industrial and Labor Relations

Postdoc Associate, Cornell University (October, 2018 - December, 2019), Ithaca, New York. New Conversations Project: Sustainable Labor Practices in Global Supply Chains, School of Industrial and Labor Relations

Ph.D. Fellow, Copenhagen Business School (2013 - 2018), Copenhagen, Denmark. Department of International Economics, Government, and Business Research Associate, Lund University (2012 - 2013), Lund, Sweden. Research Project on Sweden-North Korea Relations

Other Employment

External Consultant, Yangon Office of the International Labor Organization (2017), Myanmar, Myanmar. Provided Korean-to-English translation of the ILO Guide to Myanmar Labour Law and proofreading

Program Officer, BASPIA (human rights NGO) (2008 - 2010), Seoul, Republic of Korea.

- Developed and executed Human Rights-Based Approach (RBA) training for Korean NGO professionals in the fields of international development
- Provided Korean and English translation to foreign media and NGOs collecting testimonies of North Korean refugees living in South Korea and China

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		3		3
Articles-in-Progress (All)		5		5
Publications of Non-refereed or Invited Papers				0
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings		3		3
Paper Presentations (Refereed)		7		7
Grants - Funded (both refereed and non-refereed)		2		2

Totals		20		20

Refereed Scholarly Publications

Articles in Refereed Journals

Bae, J., Lee, J., Chung, S., & Kwon, H. (2024). Competent suppliers as a missing link: A supplier-centred view on cascading private labor governance in global value chains. *Journal of World Business*, 60 (1). [A+]

Bae, J., & Thein, H. (2024). Brokering Political Corporate Social Responsibility: Production Network Intervention Programmes in Post-Reform Myanmar's Garment Industry. *Global Networks, A Journal of Transnational Affairs*, 25 (1). [A]

This article aligns with **SDGs 8 (Decent Work and Economic Growth), 10 (Reduced Inequalities), 16 (Peace, Justice, and Strong Institutions), and 17 (Partnerships for the Goals)** by examining how corporate social responsibility initiatives can play a key role in improving labor conditions, reducing inequality, strengthening governance, and fostering partnerships to address governance gaps and promote responsible business practices.

Li, C., Kuruvilla, S., & Bae, J. (in press, 2024). Between legitimacy and cost: freedom of association and collective bargaining rights in global supply chains. *ILR Review (Industrial and Labor Relations Review)*. [A+]

Chung, S., Down, H., Bae, J., & Lee, J. (2021). A double-edged sword of strong ties: The case of a Korean MNC and its labor auditing. *Journal of Asian Sociology*, 50 (1), 33-54.

Kwon, H., Bae, J., Lee, J., & Chung, S. (2021). Toward a bipolar apparel GVC? From the perspective of first-tier suppliers. *Journal of Asian Sociology*, 50 (1), 9-32.

Bae, J., Lund-Thomsen, P., & Lindgreen, A. (2021). Global Value Chains and Supplier Perceptions of Corporate Social Responsibility: A Case Study of Garment Manufacturers in Myanmar. *Global Networks, A Journal of Transnational Affairs*, 21 (4), 653-680. [A]

Bae, J., & Andersson, M. (2015). Sweden's engagement with the Democratic People's Republic of Korea. *North Korean Review*, 11 (1), 42-62.

Chapters in Edited Books

Bae, J. (2023). Formalizing foreign manufacturer status while deepening local embeddedness: Korean manufacturers in Myanmar's export-oriented apparel industry. In Lim, H., Kwon, H., & Lee, J. (Eds.), *Weaving Asia: Globalization and the Korean Apparel Industry*. Palgrave Macmillan. [Status: Published]

Bae, J. (2021). Where wages stand and where we need to go. In S. Kuruvilla (Ed.), *Private Regulation of Labor Practices in Global Supply Chains: Problems, Progress and Prospects* (pp. 112-147). Ithaca, NY: Cornell University Press. [Status: Published]

Bae, J. (2021). Progress in improving labor practices in global supply chains: An empirical examination. *Private Regulation of Labor Practices in Global Supply Chains: Problems, Progress and Prospects* (pp. 79-111). Ithaca, NY: Cornell University Press. [Status: Published]

Other (Non-refereed) Scholarly Publications

Invited Articles/Review articles

Kwon, H., Bae, J., & Kim, S. (2021). Introduction: Emerging MNCs and Socioeconomic Dynamics in Asia. *Journal of Asian Sociology*, 50 (1), 1-8.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Bae, J., Kuruvilla, S., & Li, C. (2024). *How does MNE govern labor practices in global value chains? Extending the quasi-internalization of value chain governance*. Strategic Management Society Meeting, Seoul, Unknown.

Description: 2024 Strategic Management Society Paper Development Workshop in Seoul, Korea

Bae, J., Kuruvilla, S., & Li, C. (2024). *How does MNE govern labor practices in global value chains? Extending the quasi-internalization of value chain governance*. Academy of International Business (AIB) Annual Meeting, Seoul, Unknown.

Description:

Sustainability Special Interest Group Paper Development Workshop at the 2024 Academy of International Business Annual Meeting in Seoul, Korea

Bae, J., Kuruvilla, S., & Li, C. (2024). *How does MNE govern labor practices in global value chains? Extending the quasi-internalization of value chain governance*. Academy of International Business Canada Chapter Conference, Calgary, Canada-Alberta.

Bae, J. (2023). *Do self-regulating suppliers have better labor compliance?* Labor and Employment Relations Annual Meeting, Detroit, Michigan.

Bae, J., Nardon, L., & Shukla, S. (2023). *Hosting at-risk scholars: Carleton University case*. Academy of International Business (AIB) Annual Meeting, Warsaw, Poland.

Bae, J., Lee, J., Wook, C. S., & Kwon, H. (2023). *What do first-tier suppliers do for private labor regulation in global value chains?* Academy of International Business (AIB) Annual Meeting, Warsaw, Poland.

Bae, J., Lee, J., Wook, C. S., & Kwon, H. (2023). *What do first-tier suppliers do for private labor regulation in global value chains?* Academy of

Management Annual Meeting, Boston, Michigan.

Bae, J. & Thein, H. H. (2023). *Translating new CSR in the post-reform Myanmar's garment industry*. Academy of International Business Canada Chapter Conference, Montreal, Canada-Ontario.

Bae, J., Kwon, H., & Lee, J. (2019). *A Model of Global Production Network Participation and Organizational Change: A Case of Korean First-tier Garment Supplier*. Society for the Advancement of Socio-Economics 2019 Conference, New York, New York.

Park, J. & Bae, J. (2019). *Does the Export Destination Matter in Worker Wage? A Case of Myanmar's Garment Industry*. Labor and Employment Relations Association, Cleveland, Ohio.

Other Presentations

Invited Lecture

2024: HEC Montreal, Montreal, Canada-Quebec. Presented my research at the early career researcher workshop "Shifting Responsibility Boundaries in Global Value Chains" HEC Montréal (invite-only)

2023: Carleton University. Regulatory Governance Initiative supported by SSHRC. Title: "Informing Possible Futures for the use of Third-Party Audits in AI Regulations"

2022: School of Business, Hanyang University, South Korea. Guest lecture (virtual) on private labor standards and compliance for an undergraduate course titled Business Ethics and Sustainability Management: A Global Perspective

2021: Seoul National University, South Korea. Guest lecture (virtual) on conducting qualitative research with the Nvivo program for an undergraduate course titled Research Practice in Sociology at the Department of Sociology, Seoul National University, South Korea

Presentation

2024: Carleton University. Mar 7, 2024 Presented as one of the four Sprott faculty members at "Virtual Panel Discussion - Teaching and Researching the SDGs: Sustainable Development Goals Innovations" at Carleton University

2023: Sprott School of Business. Provided the guest lecture on the topic of planning and doing international fieldwork for PhD students in the Seminar in International Business II: Managing in a Global Environment (BUSI 6705)

2017: Danish Ethical Training Initiative.

Contract or Other Research

Research Grants and Awards

Grants

2025 [Year 3 of 3]: Bae, J. Insight Development Grant (\$19,052.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 2 of 2]: Bae, J. Carleton University Research Development Grants – SSHRC Early Career Researcher stream (\$4,925.00), Principal Investigator, PRI-Carleton University. Title: Corporate responses to labor and environmental risks in global supply chains: a systematic literature review. [Status: Funded]

2024 [Year 2 of 3]: Bae, J. Insight Development Grant (\$19,052.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 2]: Bae, J. Insight Development Grant (\$27,970.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 1 of 2]: Bae, J. Carleton University Research Development Grants – SSHRC Early Career Researcher stream (\$4,924.00), Principal Investigator, PRI-Carleton University. Title: Corporate responses to labor and environmental risks in global supply chains: a systematic literature review. [Status: Funded]

2023 [Year 1 of 3]: Bae, J. Insight Development Grant (\$19,052.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 2]: Bae, J. Insight Development Grant (\$27,970.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

Other Professional Activities

Consulting Experience

2017: Yangon Office of the International Labor Organization, ILO Guide to Myanmar Labour Law, Provided Korean-to-English translation of the ILO Guide to Myanmar Labour Law and proofreading

2008 – 2010: BASPIA, Program Officer,

- Developed and executed Human Rights-Based Approach (RBA) trainings for Korean NGO professionals in the fields of international development
- Provided Korean and English translation to foreign media and NGOs collecting testimonies of North Korean refugees living in South Korea and China

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Panelist

2020: Korean Labor Institute.

Invited Lecture

2024: HEC Montreal, Montreal, Canada-Quebec. Presented my research at the early career researcher workshop "Shifting Responsibility Boundaries in Global Value Chains" HEC Montréal (invite-only)

2023: Carleton University. Regulatory Governance Initiative supported by SSHRC. Title: "Informing Possible Futures for the use of Third-Party Audits in AI Regulations"

2022: School of Business, Hanyang University, South Korea. Guest lecture (virtual) on private labor standards and compliance for an undergraduate course titled Business Ethics and Sustainability Management: A Global Perspective

2021: Seoul National University, South Korea. Guest lecture (virtual) on conducting qualitative research with the Nvivo program for an undergraduate course titled Research Practice in Sociology at the Department of Sociology, Seoul National University, South Korea

Other Professional Service Activities

2024: External Examiner of Mahsa Mohammadrezaei. Oct 22, 2024 An external examiner of Mahsa Mohammadrezaei for her Digital Transformation and Innovation PhD thesis defence, University of Ottawa

2023: Copenhagen Business School, Copenhagen, Denmark. "Labor in Apparel Global Value Chains" workshop

Reviewer: Ad Hoc Reviewer for a Journal

2023: Journal of Industrial Relations. Reviewed a manuscript for Journal of Industrial Relations

Reviewer: Book / Textbook

2023: Regulation & Governance.

Reviewer: Conference Paper

2023: Academy of International Business.

2023: Administrative Sciences Association of Canada conference. Reviewed three papers for the 2023 Administrative Sciences Association of Canada conference

Scholarly Work in Progress

Working Papers

Bae, J., Kuruvilla, S., & Li, C. (2022). "Does private labor regulation reward self-regulating suppliers?."

Bae, J. & Thein, H. (2022). "Making sense of international donors' CSR promotion efforts: A case of Myanmar's export garment industry."

Bae, J., Lee, C., Chung, S., & Kwon, H. (2022). "Achieving 'good enough' compliance: Multinational first-tier suppliers and their roles in private labor regulation."

Li, C., Kuruvilla, S., & Bae, J. (2022). "Uneven progress in freedom of association rights in global supply chains."

Bae, J. & Kuruvilla, S. (2022). "Corporate social responsibility in apparel supply chain wages."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	IBUS5701	International Business	0.25	27	Main	100%
2024/Winter	BUSI2701	Fundamentals of International Business	0.5	47	Main	100%
2024/Winter	BUSI2701	Fundamentals of International Business	0.5	76	Main	100%
2024/Winter	IBUS5701	International Business	0.25	16	Main	100%
2023/Fall	BUSI2702	Intro International Management	0.5	30	Main	100%
2023/Summer	BUSI2701	Fundamentals of International Business	0.5	33	Main	100%
2023/Winter	IBUS5701	International Business	0.25	31	Main	100%
2023/Winter	BUSI2701	Fundamentals of International Business	0.5	77	Main	100%
2023/Winter	IBUS5701	International Business	0.25	5	Main	100%
2023/Winter	IBUS5701	International Business	0.25	7	Main	100%

2022/Fall	BUSI2702	Intro International Management	0.5	38	Main	100%
2022/Winter	IBUS5701	International Business	0.25	0	Main	100%
2022/Winter	IBUS5701	International Business	0.25	31	Main	100%
2022/Winter	IBUS5701	International Business	0.25	25	Main	100%
2022/Winter	BUSI4706	International Human Resource Management	0.5	0	Main	100%
2022/Winter	BUSI2701	Fundamentals of International Business	0.5	80	Main	100%
2021/Winter	BUSI2701	Fundamentals of International Business	0.5	80	Main	100%
2021/Winter	BUSI4706	International Human Resource Management	0.5	15	Main	100%

Service to the institution (Academic)

External Committees

Thesis Assignments

Masters Thesis Committees:

2024-2025: Pourya Parsaei's MSc Thesis Defence

2023-2024: Chenrui Fu

2021-2022: Liam Hoselton

PhD. Thesis Committees:

2023-2024: Tasnuva Chaudhury

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: Early Research Career committee (Co-Chair)

Sprott School of Business, Carleton University

School Assignments

Other Committees:

2024-2025: AACSB Continuous Improvement Review session

2022-2023: Ontario Graduate Scholarship Adjudication Committee

H. OTHER

Selected Media Appearances: Print

2017 - Expert commentary on the article Nordkoreansk tøj kan ende i Danmark (North Korean clothes can end up in Denmark) : Danwatch, Danish investigative journalism media

Student Experience Activities

2022 - Faculty panelist at the SSHRC graduate scholarship workshop for MSc and PhD students

Selected Media Appearances: Print

2016 - Thread & Needle : Korean language articles on CSR topics

2017 - Thread & Needle : Korean language articles on CSR topics

2018 - Thread & Needle : Korean language articles on CSR topics

2017 - Nordkoreansk tøj kan ende i Danmark, Danwatch

Student Experience Activities

2022 - SSHRC graduate scholarship workshop for MSc and PhD students

Selected Media Appearances: Online

2024 - one-hour virtual expert interview by Policy Horizons Canada to provide insights on the future of reshoring and contribute to their ongoing research on reshoring activities and their potential impacts on the Canadian economy and workforce : one-hour virtual expert interview by Policy Horizons Canada to provide insights on the future of reshoring and contribute to their ongoing research on reshoring activities and their potential impacts on the Canadian economy and workforce (invite only) December 5, 2024

Credentials

Professional Memberships

Academy of Management, N/A

Society for the Advancement of Socio-Economics, N/A

Professional Development

Other Professional Development

2023: Academy of Management Annual Meeting. Attended the Junior Faculty Consortium at the 2023 Academy of Management annual meeting – International Management division (competitive)

2022: Kinàmàgawin Indigenous Learning Certificate.

Service to the Community

Member of a Committee

2023: Global Korea Scholarship, Participated as an external interviewer for the Global Korea Scholarship (Korean government's scholarship for international students wanting to study in Korean universities) upon invitation from the Korean embassy in Canada.

Curriculum Vitae - Sprott School of Business

Antonio (Tony) Bailetti, PhD
Associate Professor - Tenured, 1983
Sprott School of Business (Entrepreneurship)
Telephone: 613-520-2600 x8398
Email: bailetti@sce.carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Cincinnati.
Master of Business Administration. University of Cincinnati.
Bachelor of Science. Universidad Nacional de Ingeniería.

B. EMPLOYMENT

Academic Appointments

Director, Technology Innovation Management Program, Carleton University (2006 - Present), Ottawa, Canada-Ontario.
Associate Professor, Department of Systems and Computer Engineering, Carleton University (1991 - Present), Ottawa, Canada-Ontario.
Associate Professor, Carleton University, Sprott School of Business (1983 - Present), Ottawa, Canada-Ontario.
Director, Technology Innovation Management Program, Carleton University (1999 - 2005), Ottawa, Canada-Ontario.
Director, Carleton University, Sprott School of Business (1981 - 1988), Ottawa, Canada-Ontario.
Assistant Professor, Carleton University, Sprott School of Business (1979 - 1983), Ottawa, Canada-Ontario.
Assistant Professor, Faculty of Administration, University of Manitoba (1976 - 1979), Winnipeg, Manitoba, Canada-Manitoba.

Other Employment

Director, Customer Premises Equipment, Bell-Northern Research (1988 - 1991), Ottawa, Canada-Ontario.
Analyst, Marketing Department, Minero Peru (1969 - 1971), Peru, Peru.

C. PROFESSIONAL HONOURS

2016: Immigrant Entrepreneur Award, Province of Ontario.
2011: Ottawa Innovation Community Award, Ottawa Centre of Regional Innovation.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	2		3
Publications in Conference Proceedings (Refereed)		5		5
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings	1	1		2
Paper Presentations (Refereed)		1		1
Grants - Funded (both refereed and non-refereed)		2		2
Grants - Pending (both refereed and non-refereed)		4		4
Totals	2	15		17

Refereed Scholarly Publications

Articles in Refereed Journals

Bashuri, E., & Bailetti, A. (2021). Strategies for a Small to Medium-sized Enterprise to Engage in an Existing Ecosystem. *Technology Innovation Management Review*, 11 (7/8), 5-19. [C]
Bailetti, T., Tanev, S., & Keen, C. (2020). What Makes Value Propositions Distinct and Valuable to New Companies Committed to Scale Rapidly?

Technology Innovation Management Review, 10 (6), 14-27. [C]

Bailetti, T., & Tanev, S. (2020). Examining the Relationship Between Value Propositions and Scaling Value for New Companies. *Technology Innovation Management Review*, 10 (2), 5-13. [C]

Bailetti, A., & Gad, M. (2016). Examining the modes malware suppliers use to provide goods and services. *Technology Innovation Management Review*, 6 (2), 21-27. [C]

Bailetti, A., Gad, M., & Shah, A. (2016). Intrusion learning: An overview of an emergent discipline. *Technology Innovation Management Review*, 6 (2), 15-20. [C]

Bailetti, A., & Zijdemans, E. (2014). Cybersecurity startups: The importance of early and rapid globalization. *Technology Innovation Management Review*, 4 (11), 15-21. [C]

Bailetti, A., Levesque, R., & Walsh, D. (2014). The online world of the future: Safe, productive, and creative. *Technology Innovation Management Review*, 4 (10), 5-12. [C]

Bailetti, A., Craigen, D., Hudson, D., Levesque, R., McKeen, S., Walsh, D. (2013). Developing an innovation engine to make Canada a global leader in cybersecurity. *Technology Innovation Management Review*, 3 (8), 5-14. [C]

Bailetti, A., & Bot, S. (2013). An ecosystem-based job-creation engine fuelled by technology entrepreneurs. *Technology Innovation Management Review*, 3 (2), 31-40. [C]

Bailetti, A. (2012). What technology startups must get right to globalize early and rapidly. *Technology Innovation Management Review*, 2 (10), 5-16. [C]

Bailetti, A., Bot, S., Duxbury, T., Hudson, D., McPhee, C., Steven M. Muegge, M. Weiss, J. Wells, M. Westerlund (2012). An Overview of Four Issues on Technology Entrepreneurship in the TIM Review. *Technology Innovation Management Review*, 2 (6), 28-34. [C]

Bailetti, A. (2012). Technology entrepreneurship: Overview, definition, and distinctive aspects. *Technology Innovation Management Review*, 2 (2), 5-12. [C]

Bailetti, A. (2011). Fostering student entrepreneurship and university spinoff companies. *Technology Innovation Management Review*, 1 (10), 7-12. [C]

Tanev, S., Bailetti, A., Allen, S., Milyakov, H., Durchev, P., Ruskov, P. (2011). How do value co-creation activities relate to the perception of firms' innovativeness? *Journal of Innovation Economics*, 7 (1), 131-159. [C]

Tanev, S., Ruskov, P., Georgiev, L., & Bailetti, A. (2011). A business intelligence tool for studying value co-creation and innovation. *Information Technologies and Control*, 1, 2-9.

Articles in Refereed Conference Proceedings

Full Paper

Tanev, S., & Bailetti, T. (2022). Applying a translational research approach to develop a business model framework. *ISPIM Innovation Conference*.

Tanev, S., Bailetti, T., Keen, C., & Hudson, D. (2022). Can AI empower value propositions of new globally-driven companies? *ISPIM Connects*. 6-8 December, 2020.

Tanev, S., Bailetti, A., & Keen, C. (2020). A value proposition framework for new companies committed to scale. *CCSBE 2020 Virtual Conference*.

Singh, J., Tanev, S., & Bailetti, A. (2020). Using text analytics to discover business scaling research gaps. *ISPIM Innovation Conference*.

Tanev, S., Hosseinienejad, F., Mamosian, H., & Bailetti, A. (2019). Practical research insights for internationally growing new ventures. In Iain Bitran et al. (Ed.) *ISPIM Connects*, LUT Scientific and Expertise Publications.

April 7-10, 2019, Ottawa, Canada. Joint pub with TIMG 5103 students.

Muegge, S., Bailetti, A., & Sunna, A. (2018). A design perspective on business ecosystems: Intentional reuse of components. *ISPIM Conference*. March 25-28 2018, Boston.

Hou, H., Tanev, S., Gorra, A., & Bailetti, T. (2018). A topic modeling approach to categorizing the value propositions of cybersecurity startups using machine learning as a differentiator. In D. Tomiuk, H. Motaghi & M. Srivastava, Fredericksburg, Virginia (Eds.) *International Conference of the Association of Global Management Studies*, Association of Global Management Studies, 96-118.

Best Paper Award. Proceedings of the 2018 (8th) International Conference of the Association of Global Management Studies, Concordia University, Montreal, QC, Canada, June 21–22, 2018(ISSN 2150-846).

Mamosian, H., Tanev, S., Bailetti, T., & Tzolov, V. (2018). Using online text analytics to differentiate the market offers of technology firms. *ISPIM Connects*, UT Scientific and Expertise Publications.

Proceedings of the ISPIM Connects Fukuoka Conference, Fukuoka, Japan. (ISSN-L 2243-3376, ISSN 2243-3376, ISBN 978-952-335-221-6)

Muegge, S., Bailetti, T., & Sunna, A. (2018). A design perspective on business ecosystems: Intentional reuse of components. *ISPIM Innovation Forum 2018*.

March 25-28, Boston, USA). Shortlisted for the ISPIM Impact Award (one of three finalists for best paper)

Bailetti, A., Enkerli, A., Tanev, S., & Craigen, D. (2018). Applying glocalization principles to enhance a cybersecurity ecosystem of ecosystems. *ISPIM Innovation Forum*.

25-28 March, 2018, Boston

Westerlund, M., Muegge, S., Bailetti, A., & Weiss, M. (2017). Motivation for continued contribution to an open access innovation journal. *ISPIM Innovation Symposium*.

March 19-22, Toronto, Canada.

Westerlund, M., Bailetti, T., Muegge, S., & Weiss, M. (2017). Towards smart cities: Residential interest in community platforms. *ISPIM Innovation Forum*.

March 19-22, Toronto, Canada

Zijdemans, E., Azimi, Z., Tanev, A., & Bailetti, A. (2015). Early and rapid globalization as part of innovation and growth strategies: Towards a framework supporting the global start of new technology firms. *R&D Management Conference*.

June 23-26, 2015. Pisa, Italy.

Weiss, M., & A., B. (2015). A case for open source cybersecurity. *ICE/IEEE International Technology Management Conference*.

Tanev, S., Ferreira, E., & Bailetti, A. (2010). An empirical study of open source hardware business models and market offers. *International Product Development Management Conference*.

Muegge, S. M., Bailetti, A., King, D., Tanev, S., & Weiss, M. (2010). Distance education with BigBlueButton. *International Conference on Education and New Learning Technologies (EDULEARN)*.

EDULEARN19. July 5-7, 2010. Barcelona, Spain.

Tanev, S., Durchev, P., Milyakov, H., Ruskov, P., Bailetti, A., Allen, S. (2010). Value co-creation in open source firms ... and beyond. *International Workshop on Open Source Innovation*.

International Workshop on Open Source Innovation (Beyond software) - Turning dispersed ideas and efforts into successful businesses?

February 26, 2010. Strasbourg, France.

Tanev, S., Durchev, P., Milyakov, H., Ruskov, P., Bailetti, A., S. Allen (2010). An empirical study of value cocreation platforms – principal components, design and implementation patterns. *International Product Development Management Conference*.

Edited Books

Bailetti, A., & Hurley, B. (Ed.). (2013). *Best of TIM Review for Technology Entrepreneurs*.

Description:

Giggey, V., & Bailetti, A. (2007). *Early stage market modeling - using theoretical perspectives*. Saarbücken, Germany: VDM Verlag.

Chapters in Edited Books

Tanev, S., Bailetti, T., Keen, C., & Hudson, D. (2022). The Potential of AI to Enhance the Value Propositions of New Companies Committed to Scale Early and Rapidly. In Tanev, S. & Blackburn, H (Eds.), *Artificial Intelligence and Innovation Management* (pp. 185-213). World Scientific Publishing Europe. [Status: Published]

Westerlund, M., Craigen, D., Bailetti, T., & Agwae, U. (2019). A Three-vector Approach to Blind Spots in Cybersecurity. In Mehdi Khosrow-Pour, D.B.A. (Ed.), *Advanced Methodologies and Technologies in System Security, Information Privacy, and Forensics* (pp. 93-104). USA: IGI Global. [Status: Published]

Westerlund, M., Craigen, D., Bailetti, A., & Agwae, U. (2018). A Three-vector Approach to Blind Spots in Cybersecurity. In Khosrow-Pour, M. (Ed.), *Encyclopedia of Information Science and Technology (4th edition)* (pp. 1684-1693). IGI Global. [Status: Published]

Description: DOI: 10.4018/978-1-5225-2255-3.ch147

Bailetti, A., Weiss, M., Muegge, S., & Westerlund, M. (2014). Lead To Win: An ecosystem approach to making universities more entrepreneurial. In A. Meerman & T. Kliewe (Eds.), *UIN Good Practice Series 2014: Fostering University-Industry Relationships, Entrepreneurial Universities and Collaborative Innovation* (pp. 397-408). University Industry Innovation Network. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Scholarly Publications

2011: Bailetti, A., *Carleton entrepreneurs: The first keystone off-the-shelf application*. Open Source Business Resource. April.

2010: Bailetti, A., *Keystone off-the-shelf*. Open Source Business Resource. September

2010: Bailetti, A., *Blueprint and approach to grow revenue in small technology companies*. Open Source Business Resource. June

2010: Bailetti, A., *Technical entrepreneurs benefit from business ecosystems*. Open Source Business Resource. February

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Bailetti, T. & Tanev, S. (2022). *Applying a translational research approach to develop a business model framework*. ISPIM Innovation Conference, Copenhagen, Denmark.

Description: Bailetti, T. & Tanev, S. (2022). Applying a translational research approach to develop a business model framework.

Proceedings of the XXXIII ISPIIM Innovation Conference "Innovating in a Digital World", Copenhagen, Denmark, June 5-8, 2022. LUT Scientific and Expertise Publications: ISSN 2243-3376.

Bailetti, A. (2016, February). *Comparing public-private partnerships*. Meeting of the American Association for the Advancement of Science, Washington, D.C., Washington.

Description:

Weiss, M. & A., B. (2015). *A case for open source cybersecurity*. ICE/IEEE International Technology Management Conference, Belfast, Ireland (Northern).

Bailetti, A., Zijdemans, E., Tanev, S., & Rasmussen, E. (2015, September). *The challenges of being both lean and global: Research insights for science and technology entrepreneurs*. Management of High Technologies Commercialization and Regional Innovation Systems, Saratov, Russia.

Description: 2015 Saratov Fall Meeting session "Management of High Technologies Commercialization and Regional Innovation Systems XI

Bailetti, A., Muegge, S., Weiss, M., & Westerlund, M. (2014, April). *An ecosystem approach to making universities more entrepreneurial*. University-Industry Interaction (UIIN) Conference, Barcelona, Spain.

Bailetti, A. & Mcphee, C. (2012). *Leadership position in technology entrepreneurship and commercialization*. TIM Lecture Series, Ottawa, Canada-Ontario.

Ferreira, E., Tanev, S., & Bailetti, A. (2010). *An empirical study of open source hardware business models and market offers*. International Product Development Management Conference, Murcia, Spain.

Description: 17th International Product Development Management Conference "The innovation in crisis time", June 13-15, 2010, Murcia, Spain.

Other Presentations

Presentation

2019: Nigeria-Canada Investment Summit. Bailetti, A. and Bailetti, E. 2019. What a company must do to be worth \$1 billion in less than 10 years. Nigeria-Canada Investment Summit, Abuja, November 4.

2019: Canadian National Conference on Innovation, Ottawa, Canada-Ontario. Bailetti, A. 2019. Roadmap to making Canada the most innovative country in the world. Canada 152: The Canadian National Conference on Innovation, Ottawa, June 12–13.

2019: Ventures for Canada, Ottawa, Canada-Ontario. Bailetti, A. 2019. Playbook and Principles to Scale Ventures for Canada, Ottawa, June 10.

2018: Export Development Canada. Bailetti, A. 2018. Nigeria-Canada TRADE Acceleration Program, Abuja, November 5.

2017: Canadian National Conference on Innovation, Ottawa, Canada-Ontario. Bailetti, A. 2017. How to Develop a New Generation of Technology Entrepreneurs in Canada? Canada 152: The Canadian National Conference on Innovation, Ottawa, December 3, 2017.

2016: American Association for the Advancement of Science, Washington D.C., Washington. Bailetti, A. 2016. Comparing public-private partnerships. 2016 Meeting of the American Association for the Advancement of Science. February 16, Washington, D.C

Contract or Other Research

Research Grants and Awards

Grants

2022 [Year 6 of 6]: Bailetti, A. Council of Entrepreneurs for Africa (MOU), Grantee, Council of Entrepreneurs for Africa. [Status: Pending]

2021 [Year 5 of 6]: Bailetti, A. Council of Entrepreneurs for Africa (MOU), Grantee, Council of Entrepreneurs for Africa. [Status: Pending]

2020 [Year 4 of 6]: Bailetti, A. Council of Entrepreneurs for Africa (MOU), Grantee, Council of Entrepreneurs for Africa. [Status: Pending]

2019 [Year 3 of 6]: Bailetti, A. Council of Entrepreneurs for Africa (MOU), Grantee, Council of Entrepreneurs for Africa. [Status: Pending]

2019: Bailetti, A. Multidisciplinary Research Catalyst Fund, Collaborator, PRI-Carleton University. [Status: Funded]

2019 [Year 2 of 2]: Bailetti, A. & Muegge, S., Unreported Carleton In-kind, Collaborator, PRI-Carleton University. [Status: Funded]

2018 [Year 4 of 4]: Bailetti, A. Algonquin College Contract (\$122,750.00 of a total grant amount of \$491,000.00), Principal Investigator, Algonquin College. [Status: Funded]

2018 [Year 4 of 4]: Bailetti, A. Ontario Centres of Excellence (\$928,844.00 of a total grant amount of \$3,715,377.00), Principal Investigator, PRI-Ontario Centres of Excellence (OCE). Operate Capital Entrepreneurs. . [Status: Funded]

2018 [Year 4 of 4]: Bailetti, A. University of Ottawa Contract (\$187,500.00 of a total grant amount of \$750,000.00), Principal Investigator, University of Ottawa. [Status: Funded]

2018 [Year 4 of 4]: Bailetti, A. CU Grant (\$237,500.00 of a total grant amount of \$950,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2018 [Year 4 of 4]: Bailetti, A. Memorandum of Understanding, Grantee, Mitacs. [Status: Funded]

2018 [Year 2 of 2]: Bailetti, A. La Cité Collegiale (Contract), Grantee, La Cité Collegiale. [Status: Funded]

2018 [Year 2 of 2]: Bailetti, A. Bayview Yards, Grantee, Federal Economic Development Agency for Southern Ont.. Funding Agreement. [Status: Funded]

Funded]

2018 [Year 2 of 6]: Bailetti, A. Council of Entrepreneurs for Africa (MOU), Grantee, Council of Entrepreneurs for Africa. [Status: Pending]

2018: Bailetti, A. Myers Barrhaven Hyundai/Toyota Service Agreement, Grantee, Myers Barrhaven Hyundai/Toyota. [Status: Funded]

2018: Bailetti, A. Toys on Fire Service Agreement, Grantee, Toys on Fire. [Status: Funded]

2018: Bailetti, A. Bytown Travel Ltd. Service Agreement, Grantee, Bytown Travel Ltd.. [Status: Funded]

2018: Bailetti, A. Mike Carreira Chiropractic (Marketplace Chiropractic) Service Agreement, Grantee, Mike Carreira Chiropractic (Marketplace Chiropractic). [Status: Funded]

2018: Bailetti, A. Human Resource Systems Group Ltd. Service Agreement, Grantee, Human Resource Systems Group Ltd.. [Status: Funded]

2018: Bailetti, A. Bowen and Associates Service Agreement, Grantee, Bowen and Associates. [Status: Funded]

2018: Bailetti, A. Hummingbird Music Ltd. Service Agreement, Grantee, Hummingbird Music Ltd.. [Status: Funded]

2018: Bailetti, A. Hawkeye HR Service Agreement, Grantee, Hawkeye HR. [Status: Funded]

2018: Bailetti, A. Keshet Productions Service Agreement, Grantee, Keshet Productions. [Status: Funded]

2018: Bailetti, A. Marzar Service Agreement, Grantee, Marzar. [Status: Funded]

2018: Bailetti, A. ProPet Software Inc. Service Agreement, Grantee, ProPet Software Inc.. [Status: Funded]

2018: Bailetti, A. Tanya L. Carlton Service Agreement, Grantee, Tanya L. Carlton. [Status: Funded]

2018: Bailetti, A. Multicorp Realty Service Agreement, Grantee, Multicorp Realty. [Status: Funded]

2018 [Year 1 of 2]: Bailetti, A. & Muegge, S., Unreported Carleton In-kind, Collaborator, PRI-Carleton University. [Status: Funded]

2017 [Year 3 of 4]: Bailetti, A. Algonquin College Contract (\$122,750.00 of a total grant amount of \$491,000.00), Principal Investigator, Algonquin College. [Status: Funded]

2017 [Year 3 of 4]: Bailetti, A. Ontario Centres of Excellence (\$928,844.00 of a total grant amount of \$3,715,377.00), Principal Investigator, PRI-Ontario Centres of Excellence (OCE). Operate Capital Entrepreneurs. . [Status: Funded]

2017 [Year 3 of 4]: Bailetti, A. University of Ottawa Contract (\$187,500.00 of a total grant amount of \$750,000.00), Principal Investigator, University of Ottawa. [Status: Funded]

2017 [Year 3 of 4]: Bailetti, A. CU Grant (\$237,500.00 of a total grant amount of \$950,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2017 [Year 3 of 4]: Bailetti, A. Memorandum of Understanding, Grantee, Mitacs. [Status: Funded]

2017 [Year 1 of 2]: Bailetti, A. La Cité Collegiale (Contract), Grantee, La Cité Collegiale. [Status: Funded]

2017 [Year 1 of 2]: Bailetti, A. Bayview Yards, Grantee, Federal Economic Development Agency for Southern Ont.. Funding Agreement. [Status: Funded]

2017 [Year 1 of 2]: Bailetti, A. Bayview Yards (\$1,535,700.00 of a total grant amount of \$3,071,400.00), Principal Investigator, Innovation Centre at Bayview Yards. Funding Agreement. [Status: Funded]

2017 [Year 1 of 6]: Bailetti, A. Council of Entrepreneurs for Africa (MOU), Grantee, Council of Entrepreneurs for Africa. [Status: Pending]

2017 [Year 1 of 6]: Bailetti, A. & Chan, A., Collaborative Research and Training Experience, Collaborator, PRI-Carleton University. [Status: Not Funded]

2016: Bailetti, A. FedDev - Innovation Centre at Bayview Yards (\$3,000,000.00), Principal Investigator, GOV-Federal Economic Development Agency of Ontario (FedDev Ontario). Create ecosystem of cybersecurity ecosystems. . [Status: Funded]

2016 [Year 3 of 3]: Bailetti, A. Industrial Research Assistance Program (IRAP) (\$84,734.00 of a total grant amount of \$84,733.00), Principal Investigator, GOV-National Research Council of Canada (NRC). Operate Lead to Win entrepreneurial ecosystem. . [Status: Funded]

2016 [Year 2 of 4]: Bailetti, A. Algonquin College Contract (\$122,750.00 of a total grant amount of \$491,000.00), Principal Investigator, Algonquin College. [Status: Funded]

2016 [Year 2 of 2]: Bailetti, A. Campus Linked Accelerator, Grantee, Ministry of Research and Innovation. [Status: Funded]

2016 [Year 2 of 4]: Bailetti, A. Ontario Centres of Excellence (\$928,844.00 of a total grant amount of \$3,715,377.00), Principal Investigator, PRI-Ontario Centres of Excellence (OCE). Operate Capital Entrepreneurs. . [Status: Funded]

2016 [Year 2 of 4]: Bailetti, A. University of Ottawa Contract (\$187,500.00 of a total grant amount of \$750,000.00), Principal Investigator, University of Ottawa. [Status: Funded]

2016 [Year 2 of 4]: Bailetti, A. CU Grant (\$237,500.00 of a total grant amount of \$950,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2016 [Year 2 of 4]: Bailetti, A. Memorandum of Understanding, Grantee, Mitacs. [Status: Funded]

2016: Bailetti, A. Industrial Research Assistance Program (IRAP) (\$245,200.00), Principal Investigator, GOV-National Research Council of Canada (NRC). [Status: Funded]

2016: Bailetti, A. Strategic Partnership Grant for Networks, Collaborator, PRI-Carleton University. [Status: Not Funded]

2015 [Year 1 of 4]: Bailetti, A. Ontario Centres of Excellence (\$928,844.00 of a total grant amount of \$3,715,377.00), Principal Investigator, PRI-Ontario Centres of Excellence (OCE). Operate Capital Entrepreneurs. . [Status: Funded]

2015 [Year 2 of 3]: Bailetti, A. Industrial Research Assistance Program (IRAP) (\$84,734.00 of a total grant amount of \$84,733.00), Principal Investigator, GOV-National Research Council of Canada (NRC). Operate Lead to Win entrepreneurial ecosystem. . [Status: Funded]

2015 [Year 2 of 2]: Bailetti, A. TELUS Contract (\$145,833.00 of a total grant amount of \$208,334.00), Principal Investigator, PRI-Telus Communications. Cybersecurity Capability Maturity Model. [Status: Funded]

2015 [Year 2 of 2]: Bailetti, A. Department of National Defence (\$494,375.00 of a total grant amount of \$988,750.00), Principal Investigator, Department of National Defence. Department of National Defense, Sprott School of Business (Mika Westerlund), Faculty of Engineering (Steven Muegge), Faculty of Arts & Science (Scott Mitchell). [Status: Funded]

2015 [Year 1 of 4]: Bailetti, A. Algonquin College Contract (\$122,750.00 of a total grant amount of \$491,000.00), Principal Investigator, Algonquin College. [Status: Funded]

2015 [Year 1 of 2]: Bailetti, A. Campus Linked Accelerator, Grantee, Ministry of Research and Innovation. [Status: Funded]

2015 [Year 1 of 4]: Bailetti, A. University of Ottawa Contract (\$187,500.00 of a total grant amount of \$750,000.00), Principal Investigator, University of Ottawa. [Status: Funded]

2015 [Year 1 of 4]: Bailetti, A. CU Grant (\$237,500.00 of a total grant amount of \$950,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2015: Bailetti, A. Industrial Research Assistance Program (IRAP) (\$300,000.00), Principal Investigator, National Research Council of Canada. [Status: Funded]

2015 [Year 1 of 4]: Bailetti, A. Memorandum of Understanding, Grantee, Mitacs. [Status: Funded]

2014: Bailetti, A. Cooperative Research and Development Agreement (CRADA) (\$250,000.00 of a total grant amount of \$291,667.00), Principal Investigator, PRI-Ontario Centres of Excellence (OCE). Operate Capital Entrepreneurs. [Status: Funded]

2014: Bailetti, A. Industrial Research Assistance Program (IRAP) (\$220,000.00), Principal Investigator, GOV-National Research Council of Canada (NRC). Operate Lead to Win entrepreneurial ecosystem. . [Status: Funded]

2014 [Year 1 of 2]: Bailetti, A. TELUS Contract (\$145,833.00 of a total grant amount of \$208,334.00), Principal Investigator, PRI-Telus Communications. Cybersecurity Capability Maturity Model. [Status: Funded]

2014: Bailetti, A. EMC Contract (\$31,872.00 of a total grant amount of \$37,184.00), Principal Investigator, PRI-Dell EMC. Increase of entrepreneurial capacity in large companies. . [Status: Funded]

2014: Bailetti, A. Cooperative Research and Development Agreement (CRADA) (\$250,000.00 of a total grant amount of \$291,667.00), Principal Investigator, Communications Security Establishment. R&D in cybersecurity. . [Status: Funded]

2014 [Year 1 of 3]: Bailetti, A. Industrial Research Assistance Program (IRAP) (\$84,734.00 of a total grant amount of \$254,200.00), Principal Investigator, GOV-National Research Council of Canada (NRC). Operate Lead to Win entrepreneurial ecosystem. . [Status: Funded]

2014 [Year 2 of 2]: Bailetti, A. Scientists and Engineers in Business (\$472,500.00), Principal Investigator, Federal Economic Development Agency for Southern Ontario. Launch VENUS Cybersecurity Corporation. . [Status: Funded]

2014 [Year 1 of 2]: Bailetti, A. Department of National Defence (\$494,375.00 of a total grant amount of \$988,750.00), Principal Investigator, Department of National Defence. Department of National Defense, Sprott School of Business (Mika Westerlund), Faculty of Engineering (Steven Muegge), Faculty of Arts & Science (Scott Mitchell). [Status: Funded]

2014: Bailetti, A. Partnership for Prosperity (\$270,000.00), Principal Investigator, GOV-City of Ottawa. [Status: Funded]

2014: Bailetti, A. Entrepreneurship Development (\$100,000.00), Principal Investigator, Carleton University, President's Office. [Status: Funded]

2013: Bailetti, A. Economic Development Project Funding (City Ottawa) (\$55,000.00), Principal Investigator, GOV-City of Ottawa. Develop 255 Centrum. . [Status: Funded]

2013 [Year 1 of 2]: Bailetti, A. Scientists and Engineers in Business (\$472,500.00), Principal Investigator, Federal Economic Development Agency for Southern Ontario. Launch VENUS Cybersecurity Corporation. . [Status: Funded]

2013: Bailetti, A. Industrial Research Assistance Program (IRAP) (\$220,426.00), Principal Investigator, GOV-National Research Council of Canada (NRC). Operate Lead to Win entrepreneurial ecosystem. . [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Panelist

2015: Canadian Science Policy Conference, Ottawa, Canada-Ontario. The Role of Post Secondary Institutions in Building Ontario's Entrepreneurial Class

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	TIMG5907	M.A.B.A. Project	1	16	Main	100%
2024/Winter	TIMG5905	M.Ent. Project	1	12	Main	100%
2024/Winter	TIMG5901	M.Eng Project	1	14	Main	100%
2024/Winter	TIMG5203	Cross-Border Businesses & Digital Innovation	0.5	20	Main	100%
2024/Winter	TIMG5201	Technology and Wealth	0.5	53	Main	100%
2024/Winter	TIMG5104	Directed Studies: Technology Innovation Management	0.5	1	Main	100%
2024/Winter	TIMG5909	M.A. Sc Thesis	0	4	Main	100%
2023/Fall	TIMG5901	M.Eng Project	1	20	Main	100%
2023/Fall	TIMG5104	Directed Studies: Technology Innovation Management	0.5	4	Main	100%
2023/Fall	TIMG5905	M.Ent. Project	1	7	Main	100%
2023/Fall	TIMG5907	M.A.B.A. Project	1	17	Main	100%
2023/Fall	TIMG5909	M.A. Sc Thesis	0	4	Main	100%
2023/Fall	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	33	Main	100%
2023/Summer	TIMG5104	Directed Studies: Technology Innovation Management	0.5	7	Main	100%
2023/Winter	TIMG5201	Technology and Wealth	0.5	26	Main	100%
2023/Winter	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	1	Main	100%
2022/Fall	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	41	Main	100%
2022/Fall	TIMG5002	Technology Entrepreneurship	0.5	69	Main	100%
2022/Summer	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	31	Main	100%
2022/Winter	TIMG5002	Technology Entrepreneurship	0.5	49	Main	100%
2021/Fall	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	11	Main	100%
2020/Winter	TIMG5002	Technology Entrepreneurship	0.42	53	Main	85%
2020/Winter	BUSI4810	Practicum in Business Creation	0.08	9	Main	15%
2020/Winter	TIMG5201	Technology and Wealth	0.5	70	Main	100%
2019/Fall	TIMG5002	Technology Entrepreneurship	0.47	65	Main	95%
2019/Fall	BUSI4810	Practicum in Business Creation	0.03	3	Main	5%
2019/Winter	TIMG5201	Technology and Wealth	0.5	41	Main	100%
2019/Winter	TIMG5002	Technology Entrepreneurship	0.35	24	Main	100%
2019/Winter	BUSI4810	Practicum in Business Creation	0.15	11	Main	100%
2018/Fall	TIMG5002	Technology Entrepreneurship	0.47	39	Main	100%
2018/Fall	BUSI4810	Practicum in Business Creation	0.03	3	Main	100%
2018/Winter	BUSI4810	Practicum in Business Creation	0.5	4	Main	100%
2018/Winter	TIMG5201	Technology and Wealth	0.5	37	Main	100%
2018/Winter	TIMG5002	Technology Entrepreneurship	0.5	18	Main	100%
2017/Fall	BUSI4810	Practicum in Business Creation	0.1	9	Main	20%
2017/Fall	TIMG5002	Technology Entrepreneurship	0.4	32	Main	80%

2017/Winter	TIMG5201	Technology and Wealth	0.5	32	Main	100%
2017/Winter	TIMG5002	Technology Entrepreneurship	0.5	33	Main	100%
2017/Winter	BUSI4810	Practicum in Business Creation	0.5	12	Main	100%
2016/Fall	TIMG5002	Technology Entrepreneurship	0.5	30	Main	100%
2016/Fall	BUSI4810	Practicum in Business Creation	0.5	1	Main	100%
2016/Summer	TIMG5201	Technology and Wealth	0.5	21	Main	100%
2016/Winter	TIMG5002	Technology Entrepreneurship	0.5	41	Main	100%
2016/Winter	BUSI4810	Practicum in Business Creation	0.5	6	Main	100%
2015/Fall	TIMG5002	Technology Entrepreneurship	0.5	28	Main	100%
2015/Fall	BUSI4810	Practicum in Business Creation	0.5	2	Main	100%
2015/Summer	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	32	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: DBA Working Group (Co-Chair)

2018-2019: Curriculum Review Committee (TIM Steering Committee)

2016-2017 – 2017-2018: Curriculum Review Committee (TIM Programs - ITEC)

2016-2017: Hiring Committee - Entrepreneurship Faculty (Co-Chair)

2016-2017: Hiring Committee - Entrepreneurship Instructor

Credentials

Skills

Languages

English, Spanish

Expertise

Curriculum Vitae - Sprott School of Business

Eduardo Bailetti, MEnt
Assistant Professor, Teaching Stream - Term
Sprott School of Business (Entrepreneurship)
Telephone:
Email: Eduardo.Bailetti@carleton.ca
AACSB Qualification: Instructional Practitioner (IP) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Master of Entrepreneurship. Carleton University.

Bachelor of Arts. Carleton University.

B. EMPLOYMENT

Academic Appointments

Sessional Lecturer, Carleton University (May, 2019 - August, 2019), Ottawa, Canada-Ontario.

Other Employment

President, ScaleCamp Corp. (October, 2019 - Present), Ottawa, Canada-Ontario.

Program Manager - Lead To Win Business Accelerator, Carleton University (March, 2021 - April, 2022), Ottawa, Canada-Ontario.

Content Specialist, Global GERS Project (May, 2018 - April, 2022), Ottawa, Canada-Ontario.

- Synthesizes insights from academic literature into actionable principles to guide managers on how to grow a new venture early, rapidly and securely (GERS)
- Shapes a process that integrates research insights, topic modeling, and practitioner experience
- Maintains and refines an inventory of principles, topic modeling tools, and library of over 800+ high-quality academic publications focusing on new company growth.

Instructor and Advisor, Canada-India Acceleration Program (September, 2018 - October, 2018), Ottawa, Canada-Ontario.

- Developed and taught Transnational Entrepreneurship, Pitching Skills, and Improve Salesforce training units to venture founders from India and Canada
- Assisted in developing and leading training bootcamp designed to transform local ventures into transnational ventures
- Acted as growth advisor for venture founders seeking to operationalize knowledge taught in training bootcamp

Project Manager, Empowered Startups Ltd. (2016 - 2017), Whistler, Canada-British Columbia. Managed portfolio of new startups – tasked with customer discovery, customer acquisition, testing assumptions, supplier acquisition and business model discovery

Owner and Operator, Bluebird Aerial Media Ltd. (2014 - 2016), Whistler, Canada-British Columbia.

- Founded and operated aerial photography and video company for real estate and adventure tourism advertising using drone technology
- Customer development, customer management, branding, responsible piloting, relationship and policy management with regulatory bodies, video & photo editing

Operations Manager, Woody's Pub & The Farm Team Cookhouse (2012 - 2014), Ottawa, Canada-Ontario. Managed staff, inventory, scheduling, accounting, suppliers, events, marketing, training, policy development, and customer service for two small pub-restaurants

Program Manager, Girodo & Associates Management Consulting Ltd. (2006 - 2009), Vancouver, Canada-British Columbia. Managed multiple concurrent client files for foreign skilled workers, including landing services and regulatory filings. Acquired new large construction company customers through cold calls, site visits and in-person meetings.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Refereed Scholarly Publications

Articles in Refereed Journals

Bailetti, E. C. (2018). Transnational Entrepreneurship: Distinctive Features and a New Definition. *Technology Innovation Management Review*, 8 (9), 28-38. [C]

Other (Non-refereed) Scholarly Publications

Other Publications

Other Publications

2018: Bailetti, E. C., *Board of Advisors for transnational ventures.*

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	TIMG5002	Technology Entrepreneurship	0.5	54	Main	100%
2023/Fall	TIMG5002	Technology Entrepreneurship	0.5	36	Main	100%
2023/Fall	TIMG5002	Technology Entrepreneurship	0.5	60	Main	100%
2021/Fall	TIMG5002	Technology Entrepreneurship	0.5	37	Main	100%
2021/Winter	TIMG5002	Technology Entrepreneurship	0.5	58	Main	100%
2020/Fall	TIMG5002	Technology Entrepreneurship	0.5	37	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Professional Development

Other Professional Development

2022: Carleton University. Certificate in University Teaching

Curriculum Vitae - Sprott School of Business

Jasdeep Bajwa, MAcc
Assistant Professor, Teaching Stream - Preliminary - Tenure Track
Sprott School of Business (Accounting)
Telephone:
Email: jasdeepbajwa3@cunet.carleton.ca
AACSB Qualification: Instructional Practitioner (IP) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Master of Accounting. University of Waterloo.
Master of Accounting. School of Accounting and Finance, University of Waterloo.
Bachelor in Accounting and Finance. School of Accounting and Finance, University of Waterloo.

Professional Certifications

Chartered Professional Accountant (CPA), 2019
Certified Fraud Examiner, 2018
Certified Internal Auditor (CIA), 2018

B. EMPLOYMENT

Academic Appointments

Instructor II, Sprott School of Business, Carleton University (September, 2023 - Present), Ottawa, Canada-Ontario. • Successfully delivered one course in the fall term (BUSI 4008R - Management Control Systems)
• New member of the Sprott Social Committee
• Volunteered as a judge for the ROCA Case Competition
• Volunteered as a judge for the JDCC team's accounting practice case

Other Employment

Owner, Ambience Decor Ottawa (January, 2019 - Present), Ottawa, Canada-Ontario.
Senior Analyst, Risk and Governance, Wealthsimple Technologies Inc. (January, 2022 - July, 2023), Toronto, Canada-Ontario.
Senior Analyst/Manager, Risk and Internal Controls, Brookfield Renewable (May, 2019 - December, 2021), Ottawa, Canada-Ontario.
Associate/Senior Associate, Risk Assurance Services, PwC Canada (October, 2016 - May, 2019), Ottawa, Canada-Ontario.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Refereed Scholarly Publications

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4008	Advanced Management Accounting & Control	0.5	46	Main	100%
2024/Winter	BUSI1004	Financial Accounting for Business Students	0.5	68	Main	100%

2024/Winter	BUSI1004	Financial Accounting for Business Students	0.5	66	Main	100%
2023/Fall	BUSI4008	Advanced Management Accounting & Control	0.5	41	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Service to the Community

Other Community Service Activities

2023: Junior Achievement Ottawa, Active volunteer

Curriculum Vitae - Sprott School of Business

Hilary Becker, PhD
Associate Professor - Tenured, 2002
Sprott School of Business (Accounting)
Telephone: 613-520-2600 x3717
Email: hilary.becker@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-0702-8597>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Havana.

Title: *Thesis: The Balanced Scorecard in the Tourism Sector: Perfecting the methodology for its implementation. Tesis: "El Cuadro de Mando Integral en el Sector del Turismo: Perfeccionar la metodología para su implementación"*

Master of Business Administration. University of Windsor.

Bachelor of Commerce. University of Windsor.

Bachelor of Science. University of Western Ontario.

Professional Certifications

Certification in Blue Ocean Strategy, 2006, Fontainebleau, France.

Certified General Accountant (CGA), 1997, Certified General Accountants Association of Canada.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Carleton University (2015 - Present), Ottawa, Canada. Development and delivery of core curriculum of Accounting courses in both the undergraduate and MBA program. MBA Strategic Planning Committee and Student Undergraduate Senate Committee.

Assistant Professor, Carleton University (1996 - 2015), Ottawa, Canada-Ontario. Development of curriculum; Student Affairs Coordinator; Co-op Coordinator; Course coordinator; Co-ordinator Mentoring Program; MBA Strategic Planning Committee.

Adjunct Professor, University of Ottawa (1996 - 2004), Ottawa, Canada-Ontario. Development and delivery of courses in undergraduate, MBA, IMBA and EMBA (Hong Kong)

Instructor I/Sessional Lecturer, St. Lawrence College (1991 - 1996), Kingston, Canada-Ontario. Development and delivery of courses: Undergraduate Commerce and diploma courses.

Instructor I/Sessional Lecturer, Queen's University (1991 - 1996), Kingston, Canada-Ontario. Development and delivery of courses in Undergraduate Commerce and diploma courses

Other Employment

Accountant/Cost Analyst, Du Pont Canada (1989 - 1991), Kingston, Canada-Ontario. Duties: Provide financial analysis and reports to general management. Control over general ledger, provide intermediate costing for site, act as resource to various business teams, member of Accounting and Business Continuous Improvement Team.

C. PROFESSIONAL HONOURS

2016: Jim Bulloch Innovation in Accounting Education Award, Institute of Management Accountants.

2014: Best Paper Award, Academy of Business Research. Presented at Academy of Business Research Conference, Las Vegas, 2014.

2010: Mark Chain Innovation in Graduate Teaching Award, Federation of Schools of Accountancy.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		2		2
Articles-in-Progress (All)		3		3
Publications in Conference Proceedings (Refereed)		5		5

Paper Presentations (Refereed)		4		4
Grants - Funded (both refereed and non-refereed)		1	1	2
Totals		15	1	16

Refereed Scholarly Publications

Articles in Refereed Journals

- Becker, H. (2021). The Impact of the COVID-19 Global Pandemic on the Cuban Tourism Industry and Recommendations for Cuba's Response. *Multidisciplinary Business Review*, 14 (1), 71-83.
- Becker, H. (2019). A Proposal for Using Blue Ocean Strategy in Ecotourism Product Development: Methodology for Use in the Cuban Tourism Industry. *Review of Business Research*, 19 (1), 39-44.
- Becker, H. (2018). Cirque du Soleil – KA in Las Vegas: Sustainability of a Blue Ocean. *Journal of International Management Studies*, 18 (2), 39-46.
- Becker, H., Gutierrez Castillo, O., & Gutierrez Guerra, I. (2017). Cuba: What Now – A look at the Tourism Industry in the New Dynamic (Post U.S. Normalization, Post Trump and Post Fidel Castro). *Journal of Academy of Business and Economics*, 17 (4), 67-74. [C]
- Becker, H. (2016). The Yin and Yang of Blue Ocean/Red Ocean Strategic Management. *Journal of Strategic and International Studies*, XI (5), 66-71.
- Becker, H. M. (2015). An Analysis of the U.S./Cuba Normalization of Relations. *Journal of Academy of Business and Economics*, 15 (3), 21-28. [C]
- Becker, H., Gutierrez Castillo, O., & Gutierrez Guerra, I. (2014). Cuban Economic Reform: Analysis and Opportunities. *Review of Strategic and International Studies*, 6 (2), 5-12.
- Becker, H. (2014). A Blue Ocean Strategy Analysis of IMAX's Move to Go Hollywood. *Journal of International Management Studies*, 14 (2), 53-60.
- Becker, H. (2012). Entrepreneurial Professional Services in the Cuban Economy: The Missing Piece. *European Journal of Business and Research*, 12 (4), 23-28.
- Becker, H. (2012). Small Business Development: Perspectives on the Recent Changes in the Cuban Economy. *Journal of International Management Studies*, 12 (2), 34-42.
- Becker, H. (2011). Linking Blue Ocean Strategy to the VRIO Framework: Does Utilizing Blue Ocean Strategy Lead to Sustainable Competitive Advantage. *Journal of Business and Behavioral Sciences*, 23 (2), 40-57.
- Becker, H. (2011). Utilizing the Strategy Canvas in Performance Measurement Systems. *International Journal of Strategic Management*, 11 (2), 26-35.
- Becker, H. (2010). Using Blue Ocean Strategy in Performance Measurement. *International Journal of Strategic Management*, 10 (2), 140-147.

Articles in Refereed Conference Proceedings

Full Paper

- Becker, H. (2023). Post-Pandemic Opportunities in Dark Tourism. *Institute for Global Business Research Conference*.
- Becker, H. (2022). Dark Tourism in Cuba. *Institute for Global Business Research Conference*.
- Becker, H. (2021). Opening the Cuban Tourism Industry: Post Covid-19. *TOURMAN: International Scientific Conference*.
- Becker, H. (2020). Accounting for Cannabis. *Institute for Global Business Research Conference*.
- Becker, H. (2020). The Cuban Tourism Industry and Opportunities for Cuba's Response During the COVID-19 Global Pandemic Shutdowns to Emerge in a More Competitive Position. *TOURIST Conference*, 23-26.
- Becker, H. (2013). Imax Move to Hollywood: Blue Ocean Strategy or a Case of Who Moved my Cheese. *Global Conference on Business and Finance*, 472-476.

Abstract Only

- Becker, H. (2018). Cirque du Soleil: KA – A Blue Ocean Analysis. *Institute for Global Business Research Conference*, 2 (1), 95.
New Orleans
- Becker, H. (2014). The Yin and Yang of Blue Ocean/Red Ocean Strategy. *Academy of Business Research Conference*.

Chapters in Edited Books

- Becker, H. (2024). Dark Tourism in New Orleans. *Sensory Tourism: Senses and SenseScapes Encompassing Tourism Destinations* (pp. 273-282). CABI - CAB International Publishing. [Status: Published]
- Becker, H. (2013). Tourism in Cuba: Barriers to Economic Growth and Development. *Handbook of Contemporary Cuba: Economy, Politics, Civil Society and Globalization* (pp. 111-123). Routledge. [Status: Published]

Other (Non-refereed) Scholarly Publications

Articles in non-Refereed journals

Basic or Discovery Scholarship

Becker, H. (2024). Blue Ocean Strategy in a New Vein: The Blue Ocean of Twilight. *Journal of International Business and Economics*, 24 (1), 33-43.

Other Publications

Newspaper Articles or Columns

2013: Becker, H., *Cuba: Revolutionary Opportunity*. The Caribbean Property Investor Magazine, 7th Heaven Properties, UK.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Becker, H. (2024). *Sensory Dark Tourism in New Orleans*. Eurasia SoRes Conference, Bangkok, Thailand.

Becker, H. (2024). *Opportunities in Dark Tourism: The Case of New Orleans*. International Conference on Tourism Research, Cape Town, South Africa.

Becker, H. (2023). *Post-Pandemic Opportunities in Dark Tourism*. Institute for Global Business Research Conference, New Orleans, Louisiana.

Becker, H. (2023). *The Cuban Tourism Industry and Post-Pandemic Opportunities to Emerge in a More Competitive Position*. 16th International Seminar, Journalism & Tourism, Havana, Cuba.

Becker, H. (2022). *Dark Tourism in Cuba*. Institute for Global Business Research Conference, New Orleans, Louisiana.

Becker, H. (2019, October). *Blue Ocean Strategy in a New Vein*. International Academy of Business and Economics Conference, Las Vegas, Nevada.

Becker, H. (2018). *Cirque du Soleil: KA – A Blue Ocean Analysis*. Institute for Global Business Research Conference, New Orleans, Louisiana.

Becker, H. (2017). *Cuba: What Now? A Look at the Tourism Industry in the new Dynamic*. American Society of Business and Behavioral Sciences, Las Vegas, Nevada.

Becker, H. (2016). *Performance Measurement Using Blue Ocean Strategy*. Institute of Management Accountants Annual Conference, Las Vegas, Nevada.

Becker, H. (2015). *Yin and Yang of Red Ocean/Blue Ocean Strategy*. International Journal of Arts and Science Conference, Florence, Italy.

Becker, H. (2011). *Retos para la Sostenibilidad del Turismo en Cuba*. Bentro de Estudios de la Economía Cubana Annual Conference, Havana, Cuba.

Becker, H. (2011). *Linking Blue Ocean Strategy and the VRIO Framework: Does utilizing Blue Ocean Strategy lead to Sustainable Competitive Advantage?* American Society for Business and Behavioral Sciences, Las Vegas, Nevada.

Becker, H. (2011). *Tourism in Cuba: Barriers to Economic Growth and Development*. Cuba Futures: Past and Present, New York City, New York.

Becker, H. (2011). *Utilizing the Strategy Canvas in Performance Measurement Systems*. International Academy of Business and Economics (IABE), Barcelona, Spain.

Becker, H. (2010). *Blue Ocean Strategy and Performance Measurement*. International Academy of Business and Economics (IABE), Las Vegas, Nevada.

Becker, H. (2010). *The Great Debate, Expensing Stock Options*. American Accounting Association, San Francisco, California.

Other Presentations

Invited Lecture

2016: City University of New York, Bildner Center, New York, New York. City University of New York, Bildner Center: Assessing the Results of the 7th Communist Party Congress. One of three panelists discussing the impact of the normalization of relations, President Obamas' visit to Cuba and the 7th Communist Party Congress on Cuba's future.

2014: City University of New York, Bildner Center, New York, New York. Shifting U.S./Cuba Relations: Perspectives on the Obama-Castro Agreement. One of three panelists discussing the impact of the potential normalization of relations with Cuba.

2011: City University of New York, Bildner Center, New York, New York. New Developments in Economic Policy in Cuba. One of two panelists discussing recent policy changes in Cuba and its impact on the future economic performance. Interviewed by Marti Radio and TV, Miami and United Nations Press.

Keynote Address

2024: Bahamas Business Outlook 2024, Keynote Speaker: Future Bahamas: Branding the National Identity: Planning for Success, Nassau, Bahamas.

2024: Seminario Periodismo y Turismo, Havana, Cuba. Using Artificial Intelligence as a Competitive Advantage in Tourism

2023: 16th International Seminar, Journalism & Tourism, Havana, Cuba. The Cuban Tourism Market: Opportunities and Challenges

2016: Financial Executive International, Ottawa, Canada-Ontario. Invited Keynote Dinner Speaker: Financial Executive International, "Blue Ocean Strategy and Performance Management

2016: Ottawa Festivals, Ottawa, Canada-Ontario. Finance and Governance for the Not-for-Profit Sector, Ottawa Festivals (Umbrella organization of over 100 Not-for-Profit Festival, events and fair in National Capital Region, Ottawa, ON.

2010: Chartered Institute of Management Accountants, Ottawa, Canada-Ontario. "Blue Ocean Strategy"

Presentation

2018: ADGA Canada, Ottawa, Canada. Talk: "Blue Ocean Strategy Workshop" Executive Team

2018: SHAD Carleton, Ottawa, Canada-Ontario. SHAD Carleton "The Magic of Accounting"

2015: Carleton University Summer Institute, Ottawa, Canada-Ontario. Invited Speaker: "Teaching First Year Courses Summer Institute"

2013: Carleton University Spring Conference, Gananoque, Canada-Ontario. "Blue Oceans: Exploring the Edges"

2013: China Certified General Accountants Association Professional Development Seminar, Shanghai, China. "Blue Ocean Strategy"

Contract or Other Research

Research Grants and Awards

Grants

2021: Becker, H. VALIDATE: Carleton Teaching and Learning – Hyflex Teaching Development (\$3,500.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Becker, H. VALIDATE: Cannabis Governance and Accounting Research (\$5,000.00), Principal Investigator, CPA Ontario. [Status: Funded]

2019: Becker, H. Faculty Leadership Pilot Program (\$9,374.00 Not Funded), Principal Investigator, Global Affairs Canada. [Status: Not Funded]

2019: Becker, H. Emerging Leaders in The Americas, Grantee, University of Havana. [Status: Not Funded]

2014: Becker, H. Canada-Latin America & Caribbean Research Exchange Grants LACREG, Grantee, Universities Canada. [Status: Not Funded]

Other Professional Activities

Consulting Experience

2018: Pulvermacher Kennedy Consulting, Blue Ocean Strategy Engagement

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Panelist

2012: Sprott-Telfer Research Day, Ottawa, Canada-Ontario. Sustainability: Cuba and Blue Ocean Strategy – Does Blue Ocean Strategy Lead to a Sustainable Competitive Advantage?"

2010: American Accounting Association, San Francisco, California. Engaging Students", Panelist

Advisor

2010: Certified General Accountants of Ontario, Toronto, Canada-Ontario. Review of Certified General Accountants of Ontario Balanced Scorecard

Board Member: PRJ Editorial Review Board

2010 – 2018: Multidisciplinary Business Review. Editorial Board, Multi-Disciplinary Business Review, Asociación de Directivos Superiores de las Facultades de Administración, Negocios o Empresariales

Board of Directors: Substantial Involvement

2019: Certified General Accountants Association of Canada. Vice-Chair

2016 – 2017: Certified General Accountants Association of Canada. Audit Committee

2011 – 2017: Certified General Accountants Association of Canada. Ontario Representative

Invited Lecture

2016: City University of New York, Bildner Center, New York, New York. City University of New York, Bildner Center: Assessing the Results of the 7th Communist Party Congress. One of three panelists discussing the impact of the normalization of relations, President Obamas' visit to Cuba and the 7th Communist Party Congress on Cuba's future.

2014: City University of New York, Bildner Center, New York, New York. Shifting U.S./Cuba Relations: Perspectives on the Obama-Castro Agreement. One of three panelists discussing the impact of the potential normalization of relations with Cuba.

2011: City University of New York, Bildner Center, New York, New York. New Developments in Economic Policy in Cuba. One of two panelists discussing recent policy changes in Cuba and its impact on the future economic performance. Interviewed by Marti Radio and TV, Miami and United Nations Press.

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2024: Bahamas Business Outlook 2024, Keynote Speaker: Future Bahamas: Branding the National Identity: Planning for Success, Nassau, Bahamas.

2024: Seminario Periodismo y Turismo, Havana, Cuba. Using Artificial Intelligence as a Competitive Advantage in Tourism

2023: 16th International Seminar, Journalism & Tourism, Havana, Cuba. The Cuban Tourism Market: Opportunities and Challenges

2016: Financial Executive International, Ottawa, Canada-Ontario. Invited Keynote Dinner Speaker: Financial Executive International, "Blue Ocean Strategy and Performance Management

2016: Ottawa Festivals, Ottawa, Canada-Ontario. Finance and Governance for the Not-for-Profit Sector, Ottawa Festivals (Umbrella organization of over 100 Not-for-Profit Festival, events and fair in National Capital Region, Ottawa, ON.

2010: Chartered Institute of Management Accountants, Ottawa, Canada-Ontario. "Blue Ocean Strategy"

Member: Committee/Task Force

2022 – 2024: Caribbean Tourism Research Network.

2022 – 2024: International Tourism Studies Association.

2015 – 2024: Chartered Professional Accountants of Canada (CPA Canada). Technical Reviewer of Module 10 (Performance Management) course cases and assignments for CPA PREP program

Other Professional Service Activities

2024: Bahamas: Lyford Academy. Developing a Culture of Hospitable Customer Care for the Bahamas

2021: Mitacs Accelerate Proposal, Reviewer.

2018: Certified General Accountants Association of Canada. Vice-Chair, C

Reviewer: Ad Hoc Reviewer for a Journal

2022: Multidisciplinary Business Review. *The Online Communities of Practices and Faculty Members' Professional Development: A Critical Literature Review*

2022: Multidisciplinary Business Review. Benchmarking Strategic Orientation and Firm Performance: An Analysis of the Entrepreneurial Orientation Dimensions

2022: Multidisciplinary Business Review. Service Quality Implications of Cross-Cultural Differences in Tourism and Hospitality

2022: Multidisciplinary Business Review.

2020 – 2021: Tourism Review Journal.

2020 – 2021: Current Issues in Tourism Journal.

2020: Journal of Tourism.

2019 – 2020: Multidisciplinary Business Review.

2018: Tourism Planning & Development Journal. Tourism Planning & Development Journal, reviewed paper: "Provisioning Cuba's Private Restaurants: Linking Tourism and Agriculture"

2018: Multidisciplinary Business Review. Multi-Disciplinary Business Review, reviewed paper: "Organizational Culture: Customer Orientation, Employee & Customer Satisfaction"

2017: Tourism Planning and Development.

Reviewer: Book / Textbook

2023: Teaching Cases at IVEY publishing.

2018: New West Indian Guide. Book Review and forward for New West Indian Guide, Volume 92.1-2, 2018 Tourism and Informal Encounters in Cuba, Valerio Simoni, New York: Berghahn Books, Xvi

2018: Chartered Professional Accountants Association of Canada. Chartered Professional Accountants Association of Canada (CPA Canada) Reviewer of Module 10 (Strategic Governance) course cases and assignments for CPA PREP program

2016: Tourism and Informal Encounters in Cuba by Valerio Simoni.

Reviewer: Conference Paper

2010 – 2011: Sprott PhD Symposium, Ottawa, Canada-Ontario.

Scholarly Work in Progress

Papers Under Review

Becker, H. (2019). "A Proposal for Using Blue Ocean Strategy in Ecotourism Product Development: Methodology for Use in the Cuban Tourism Industry," Initial submission.

Working Papers

Becker, H. (2020). "Blue Ocean Strategy in a New Vein."

Becker, H. (2020). "Opportunities for Cuba's Tourism Industry Response During the COVID-19 Global Pandemic Shutdowns."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	ACCT5012	Performance Measurement & Control	0.25	57	Main	100%
2024/Winter	ACCT5002	Managerial Accounting	0.25	17	Main	100%
2024/Winter	BUSI3629	Corporate Governance and Strategy	0.5	21	Main	100%
2023/Fall	ACCT5002	Managerial Accounting	0.25	23	Main	100%
2023/Fall	ACCT5131	Performance Management	0.5	18	Main	100%
2023/Fall	ACCT5131	Performance Management	0.5	44	Main	100%
2023/Fall	ACCT5012	Performance Measurement & Control	0.25	15	Main	100%
2023/Fall	ACCT5002	Managerial Accounting	0.25	16	Main	100%
2023/Summer	ACCT5012	Performance Measurement & Control	0.25	24	Shanghai	100%
2023/Winter	ACCT5012	Performance Measurement & Control	0.25	1	Main	100%
2023/Winter	ACCT5002	Managerial Accounting	0.25	12	Main	100%
2023/Winter	BUSI3629	Corporate Governance and Strategy	0.5	18	Main	100%
2022/Fall	ACCT5002	Managerial Accounting	0.25	25	Main	100%
2022/Fall	ACCT5131	Performance Management	0.5	23	Main	100%
2022/Fall	ACCT5131	Performance Management	0.5	39	Main	100%
2022/Fall	ACCT5012	Performance Measurement & Control	0.25	38	Shanghai	100%
2022/Fall	ACCT5012	Performance Measurement & Control	0.25	16	Main	100%
2022/Winter	BUSI3629	Corporate Governance and Strategy	0.5	21	Main	100%
2021/Fall	ACCT5131	Performance Management	0.5	42	Main	100%
2021/Fall	ACCT5012	Performance Measurement & Control	0.25	21	Main	100%
2021/Fall	ACCT5012	Performance Measurement & Control	0.25	34	Shanghai	100%
2021/Fall	ACCT5002	Managerial Accounting	0.25	21	Main	100%
2021/Fall	ACCT5131	Performance Management	0.5	23	Main	100%
2021/Winter	BUSI3629	Corporate Governance and Strategy	0.5	31	Main	100%
2021/Winter	BUSI6001	Seminar in Accounting II	0.13	3	Main	25%
2020/Fall	ACCT5002	Managerial Accounting	0.25	25	Main	100%
2020/Fall	ACCT5012	Performance Measurement & Control	0.25	29	Shanghai	100%
2020/Fall	ACCT5131	Performance Management	0.5	29	Main	100%
2020/Fall	ACCT5131	Performance Management	0.5	41	Main	100%
2020/Summer	ACCT5012	Performance Measurement & Control	0.25	22	Main	100%
2020/Winter	BUSI6000	Seminar in Accounting I	0.1	1	Main	20%
2020/Winter	BUSI5080	Seminar in Accounting I	0.02	0	Main	5%
2019/Fall	ACCT5002	Managerial Accounting	0.25	26	Main	100%
2019/Fall	ACCT5002	Managerial Accounting	0.25	26	Main	100%
2019/Fall	ACCT5012	Performance Measurement & Control	0.25	41	Shanghai	100%
2019/Fall	ACCT5131	Performance Management	0.5	29	Main	100%

2019/Fall	ACCT5131	Performance Management	0.5	43	Main	100%
2019/Summer	STGY5900	Corporate & Business Strategy	0.5	18	Bogota	100%
2019/Winter	BUSI3629	Corporate Governance and Strategy	0.5	37	Main	100%
2018/Fall	ACCT5012	Performance Measurement & Control	0.25	29	Shanghai	100%
2018/Fall	ACCT5002	Managerial Accounting	0.25	37	Main	100%
2018/Fall	ACCT5012	Performance Measurement & Control	0.25	19	Shanghai	100%
2018/Fall	ACCT5131	Performance Management	0.5	59	Main	100%
2018/Fall	BUSI4901	Selected Topics in Management I	0.5	10	Main	100%
2018/Fall	ACCT5002	Managerial Accounting	0.25	23	Main	100%
2018/Summer	STGY5900	Corporate & Business Strategy	0.5	24	Bogota	100%
2018/Winter	IBUS5721	Regional & Global Business Strategy	0.25	41	Shanghai	100%
2018/Winter	IBUS5715	Foreign Markets: Selection, Assessment & Entry Strategies	0.25	41	Shanghai	100%
2017/Fall	STGY5900	Corporate & Business Strategy	0.5	8	Bogota	100%
2017/Winter	ACCT5012	Performance Measurement & Control	0.25	25	Main	100%
2017/Winter	IBUS5721	Regional & Global Business Strategy	0.25	28	Shanghai	100%
2017/Winter	ACCT5012	Performance Measurement & Control	0.25	28	Shanghai	100%
2016/Fall	STGY5900	Corporate & Business Strategy	0.5	20	Bogota	100%
2016/Fall	ACCT5131	Performance Management	0.5	41	Main	100%
2016/Fall	BUSI4000	Accounting Theory	0.5	34	Main	100%
2016/Summer	IBUS5721	Regional & Global Business Strategy	0.25	22	Bogota	100%
2016/Summer	IBUS5721	Regional & Global Business Strategy	0.25	30	Shanghai	100%
2016/Summer	ACCT5012	Performance Measurement & Control	0.25	31	Shanghai	100%
2016/Summer	ACCT5131	Performance Management	0.5	28	Main	100%
2016/Winter	BUSI4000	Accounting Theory	0.5	22	Main	100%
2016/Winter	ACCT5012	Performance Measurement & Control	0.25	32	Main	100%
2015/Fall	ACCT5002	Managerial Accounting	0.25	38	Main	100%
2015/Fall	STGY5900	Corporate & Business Strategy	0.5	23	Bogota	100%
2015/Fall	BUSI4000	Accounting Theory	0.5	31	Main	100%
2015/Fall	ACCT5002	Managerial Accounting	0.25	14	Main	100%

Service to the institution (Academic)

University Assignments

PhD. Comprehensive Committees:

2023-2024: Victoria Carlan

2023-2024: Robyn Hoogendam

External Committees

Thesis Assignments

PhD. Thesis Committees:

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Selected Media Appearances: Radio

2016 - Interview: Ottawa Morning, CBC Radio, Fidel Castro's Legacy

Selected Media Appearances: Television

2014 - BNN Television, Cuba Normalization of Relations with United States

2024 - Culture of Hospitable Customer Care : Interview Bahamas@Sunrise TV - Nassau Bahamas

Credentials

Professional Development

Other Professional Development

2023: Finance for the Non-Finance Manager. Finance for the Non-Financial Manager

Professional Seminars / Workshops

2022: Navigating the Path to Growth: Travel, Leisure, Tourism.

2022: Growth Mindset.

2018: Case Method Teaching Seminar Harvard Business Press. Two Day Case Method Teaching Seminar

2012: Teaching with Cases Workshop. Sprott School of Business

Executive or Professional Education

2014 - Canada Lead Facilitator, Chartered Professional Accountants Association of Canada. Module 10, Strategic Governance - Canada Lead Facilitator [Activity: Delivery of Professional Education]

2014 - Citizenship and Immigration Canada workshop. Citizenship and Immigration Canada workshop, "Leadership, Persuasion and Presentation Skill Workshop", Ottawa, ON [Activity: Delivery of Professional Education]

2014 - Department of Justice Canada workshop. "Accounting for Lawyers Workshop", Ottawa, ON [Activity: Delivery of Professional Education]

2012 - Competition Bureau of Canada workshop. 2-day "Financial Acumen Course Workshop", Ottawa, ON [Activity: Delivery of Professional Education]

2011 - Department of Foreign Affairs (DFAIT) Investment Branch workshop. "Financial Statement Analysis and Foreign Direct Investment Workshop", Ottawa, ON [Activity: Delivery of Professional Education]

2011 - "Accounting Theory and Ethics". Laurentian University and Certified General Accountants Association of Canada – Development and Delivery of 3 day seminar on "Accounting Theory and Ethics" - Accounting Professors from China delivering the CGA Program of Professional Studies in China, North Bay, ON. [Activity: Design of Professional Education]

2010 - Department of Foreign Affairs (DFAIT), Canada workshop. "Finance for the Non-Financial Manager Workshop", Ottawa, ON [Activity: Delivery of Professional Education]

2010 - Certified General Accountants Association of Ontario workshop. Certified General Accountants Association of Ontario workshop – "Blue Ocean Strategy Workshop" – Senior Management Team, Toronto, ON [Activity: Delivery of Professional Education]

2010 - Carleton University, Education Development Centre, New Faculty Orientation. "Engaging Students", Ottawa, ON [Activity: Delivery of Professional Education]

Skills

Languages

English: Proficient (Read/Write/Speak)

Spanish: Proficient

Curriculum Vitae - Sprott School of Business

Francois Brouard, DBA
Full Professor - Tenured, 2005
Sprott School of Business (Accounting)
Telephone: 613-520-2600 x2213
Email: francois.brouard@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Business Administration. Université du Québec à Trois Rivières.

Title: *Mention of Excellence under the supervision of Professor Louis Raymond, Ph.D. Thesis: Développement d'un outil diagnostique des pratiques existantes de la veille stratégique auprès des PME, May 2004, 420p. [Development of a diagnostic tool on environmental scanning practices in SME]*

Master of Accounting. Université du Québec à Trois Rivières.

Title: *Maîtrise en sciences comptables (comptabilité financière) (M.Sc.) Profile with Master Research Paper under the supervision of Professor Anne Fortin, Ph.D. Thesis: Le lien entre le sexe et le niveau hiérarchique et les dimensions de la satisfaction au travail des experts-comptables oeuvrant à titre de vérificateur dans un organisme gouvernemental canadien : une étude empirique, June 1993, 342p. [Relationship between gender and hierarchical level and job satisfaction of Canadian governmental auditor accountants: an empirical study]*

Bachelor of Business Administration. Ecole Des Hautes Etudes Commerciales.

Diploma. CÉGEP Bourgchemin.

Professional Certifications

Carleton University Certificate in University Teaching, 2012

Chartered Professional Accountants Canada, 2012, Toronto, Ontario.

Chartered Professional Accountants Ontario (CPA Ontario), 2012, Toronto, Ontario.

Fellow Chartered Accountant, Order of Chartered Accountants of Quebec, 2012

Fellow Chartered Professional Accountant, Order of Chartered Professional Accountants of Quebec, 2012

Ordre des comptables professionnels agréés du Québec (OCPAQ), Auditeur / auditor, 2012, Quebec.

Canadian Institute of Chartered Accountants / Institut canadien des comptables agréés (CICA / ICCA), 1988

B. EMPLOYMENT

Academic Appointments

Full Professor, Sprott School of Business, Carleton University (2017 - Present), Ottawa, Canada-Ontario.

Founding Director, Sprott Centre for Social Enterprises, Sprott, School of Business (2008 - Present), Ottawa, Canada-Ontario.

Associate Professor, Sprott School of Business, Carleton University (2007 - 2017), Ottawa, Canada-Ontario.

Assistant Professor, Sprott School of Business, Carleton University (2004 - 2007), Ottawa, Canada-Ontario.

Lecturer, Sprott School of Business, Carleton University (2002 - 2004), Ottawa, Canada-Ontario.

Assistant Professor, Université du Québec en Outaouais (UQO), Département des sciences comptables (1997 - 1998), Hull, Canada-Quebec.

Université du Québec en Outaouais (UQO), Département des sciences comptables (previously known as Université du Québec à Hull (UQAH))

Assistant Professor, Université du Québec en Outaouais (UQO), Département des sciences comptables (1991 - 1994), Hull, Canada-Quebec.

Université du Québec en Outaouais (UQO), Département des sciences comptables (previously known as Université du Québec à Hull (UQAH))

Other Employment

Project Manager - Professional Education Program (PEP) / Chargé de projet - Programme de formation professionnelle (PFP), Ordre des comptables agréés du Québec / Institute of Chartered Accountants of Québec (1994 - 1997), NA, Canada-Quebec.

Tax Manager - National Research Tax Services, Samson Bélair / Deloitte Haskins & Sells (1988 - 1990), N/A, Unknown.

Tax Manager, Samson Bélair / Deloitte Haskins & Sells (1986 - 1988), N/A, Unknown.

Tax Specialist, Samson Bélair / Deloitte Haskins & Sells (1984 - 1986), N/A, Unknown.

C. PROFESSIONAL HONOURS

2023: Carleton University Teaching Achievement Award, Carleton University.

2022: Prix L.S. Rosen Award for Outstanding Contributions to Canadian Accounting Education, Canadian Academic Accounting Association.

2021: Sprott Faculty Teaching Award, Carleton University.

2018: Rob Shea Research Award, Canadian Association of Career Educators and Employers. With M. Bujaki, S. Durocher, L. Neilson, A. Allen.

2012: Fellow Chartered Professional Accountant, Order of Chartered Professional Accountants of Quebec.

2012: Fellow Chartered Accountant, Order of Chartered Accountants of Quebec.

2011: Inukshuk Award, Sprott School of Business Research Committee, Carleton University.

2010: Recognition Award in Education, Ordre des comptables agréés du Québec.

2010: Prix du livre Advancia 2010 du Livre d'entrepreneuriat, Les Presses de l'Université du Québec (PUQ). Catégorie Reprendre for Cadieux, L., Brouard, F. La transmission des PME: Enjeux et perspectives, Sainte-Foy: PUQ.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	7	2	10
Articles-in-Progress (All)		10		10
Publications in Conference Proceedings (Refereed)		10	1	11
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings		4	1	5
Revisions of Books, Monographs, Compilations, Manuals			5	5
Paper Presentations (Refereed)	1	20		21
Paper Presentations (Non-Refereed)		3		3
Research Report, Non-Refereed	1	51	1	53
Grants - Funded (both refereed and non-refereed)		5	1	6
Grants - Pending (both refereed and non-refereed)		1		1
Other Research, Non-refereed		12		12
Totals	3	123	11	137

Refereed Scholarly Publications

Articles in Refereed Journals

Neal, A., Bujaki, M., Durocher, S., & Brouard, F. (2023). Identity performances on professional accounting association magazine covers. *Accounting Auditing and Accountability Journal*, 37 (3), 893-920. **[A+]**

Litalien, M., & Brouard, F. (2023). La philanthropie auprès des humoristes québécois. *Sérieux? Humour: Savoirs et pratiques*, 2 (1), 8-35. **[C,Other]**

Webb, A., Cloutier, A., & Brouard, F. (2023). Innovations in global sports brands management: the case of FC Barcelona's Barça Museum. *Managing Sport and Leisure*. **[B]**
DOI only

Brouard, F., & Choquette, E. (2022). Humour: des repères de définition. *Sérieux? Humour: Savoirs et pratiques*, 1 (1), 9-20. **[C,Other]**
Pub with no DOIs

Pilon, M., & Brouard, F. (2022). Accountability Theory in Nonprofit Research: Using Governance Theories to Categorize Dichotomies. *Voluntas: International Journal of Voluntary and Non-Profit Organizations*. **[B]**
Published online, DOI only

Pilon, M., & Brouard, F. (2022). Conceptualising Accountability as an integrated system of relationships governance, and information. *Financial Accountability and Management*. **[A]**
Early View Online Version of Record before inclusion in an issue

Bujaki, M., Durocher, S., Brouard, F., & Neilson, L. (2021). Conflicting accounts of inclusiveness in accounting firm recruitment website photographs. *European Accounting Review*, 30 (3), 473-501. **[A+]**

Bujaki, M., & Brouard, F. (2021). Students Reflections on Assurance and Taxation during COVID-19: A Commentary. *Accounting Perspectives*, 20 (3), 327-355. [B]

Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). Entrepreneurial Motivation in University Business Students: A Latent Profile Analysis based on Self-Determination Theory. *Entrepreneurship Research Journal*. [B]
accepted for publication; November 25, 2020

Brouard, F., & Paré, C. (2019). Écosystème de l'industrie de l'humour francophone. *Revue Organisations et Territoires*, 28 (3), 11.

Bujaki, M. L., Durocher, S., Brouard, F., Neilson, L., & Pyper, R. (2018). Protect, profit, profess, promote: Establishing legitimacy through logics of 'diversity' in Canadian accounting firm recruitment documents. *Canadian Journal of Administrative Sciences*, 35 (1), 162-178. [B]

Published online: 20 April 2016 (Online Version of Record published before inclusion in an issue)

Brouard, F., & Glass, J. (2017). Understanding Information Exchanges and Reporting by Grantmaking Foundations. *Canadian Journal of Nonprofit and Social Economy Research*, 8 (2), 40-56.

Brouard, F., Bujaki, M., & Durocher, S. (2017). Attracting Prospective Professional Accountants before and after the CPA Merger in Canada. *Accounting Perspectives*, 16 (2), 105-127. [B]

Brouard, F., Bujaki, M. L., Durocher, S., & Neilson, L. (2017). Professional Accountants' Identity Formation: An Integrative Framework. *Journal of Business Ethics*, 142 (2), 225-238. [A,FT50]

Online April 2016

Durocher, S., Bujaki, M., & Brouard, F. (2016). Attracting Millennials: Legitimacy management and bottom-up socialization processes within accounting firms. *Critical Perspectives on Accounting*, 39, 1-24. [A]

Brouard, F., & McMurtry, J. J. (2015). Les entreprises sociales au Canada : Un bref exposé. *Canadian Journal of Nonprofit and Social Economy Research*, 6 (1), 18-24.

Brouard, F., McMurtry, J. J., & Vieta, M. (2015). Social Enterprises Models in Canada - Ontario. *Canadian Journal of Nonprofit and Social Economy Research*, 6 (1), 63-82.

McMurtry, J. J., & Brouard, F. (2015). Social enterprises in Canada: An Introduction. *Canadian Journal of Nonprofit and Social Economy Research*, 6 (1), 6-17.

Cutler, A. S., McKay, R., & Brouard, F. (2014). Canadian Sponsorship Scandal: The Whistleblower's Perspective. *International Journal of Case Studies in Management*, 12 (2), 15.

Brouard, F., Larivet, S., & Sakka, O. (2012). Défis et actions pour développer l'entrepreneuriat social/ [Challenges and actions to develop social entrepreneurship]. *La Revue des Sciences de Gestion*, 47 (255-256), 17-22.

Elson, P., & Brouard, F. (2012). Advice for New Authors on the Submission of Articles / Conseils pour les nouveaux auteurs sur la soumission d'articles. *Canadian Journal of Nonprofit and Social Economy Research*, 3 (1), 79-91.

Janssen, F., Bacq, S., & Brouard, F. (2012). L'entrepreneuriat social ; un thème pour la recherche passée, présente et future / [Social entrepreneurship : Research theme for past, present and future]. *Revue Internationale PME*, 25 (3-4), 17-44. [C]

Larivet, S., & Brouard, F. (2012). SMEs' attitude towards SI programmes: evidence from Belgium. *Journal of Strategic Marketing*, 20 (1), 5-18. [A]

Madill, J., Brouard, F., & Hebb, T. (2010). Canadian Social Enterprises: An Empirical Exploration of Social Transformation, Financial Self-Sufficiency and Innovation. *Journal of Nonprofit and Public Sector Marketing*, 22 (2), 135-151. [B]

Larivet, S., & Brouard, F. (2010). Complaints are a Firm's Best Friend. *Journal of Strategic Marketing*, 18 (7), 537-551. [A]

Brouard, F., Larivet, S., & Sakka, O. (2010). Entrepreneuriat social et participation citoyenne/ [Social entrepreneurship and citizen participation]. *Canadian Journal of Nonprofit and Social Economy Research*, 1 (1), 46-64.

Articles in Refereed Conference Proceedings

Full Paper

Webb, A., Cloutier, A., & Brouard, F. (2022). Social Innovations Associated with Professional Sport: The Case of FC Barcelona's Barça Museum. *Administrative Sciences Association of Canada*.

Webb, A., Orr, K., Warner, M., & Brouard, F. (2022). Changing the Game: Workforce Integration Multi-Stakeholder Partnerships in Action. *European Association of Sport Management (EASM) conference*.

Brouard, F., De Champlain, C., Pilon, C., & Bourget-Caouette, B. (2022). Système de santé et de services sociaux au Québec. *Association francophone pour le savoir*.

Brouard, F., Perreault, L., & Webb, A. (2022). Mapping of Foundations associated with Professional Sports Clubs: A Review. *Association for Nonprofit and Social Economic Research*.

Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). Entrepreneurial motivations in university students. *International Congress of Psychology*.

Brouard, F., & Paré, C. (2019). Écosystème de l'industrie de l'humour francophone au Québec. *Association francophone pour le savoir*.

- Brouard, F., Dubé, M., & Pilon, M. (2019). Gouvernance dans le secteur de la santé - hôpital: 3) Perspective du trésorier et membre du. *Association francophone pour le savoir*.
- Dubé, P., Brouard, F., & Pilon, M. (2019). Gouvernance dans le secteur de la santé - hôpital: 2) Perspective du chef de la direction financière. *Association francophone pour le savoir*.
- Pilon, M., Brouard, F., & Dude, M. (2019). Gouvernance dans le secteur de la santé - hôpital: 1) Vue globale. *Association francophone pour le savoir*.
- Lu, I., Heslop, L. A., Brouard, F., Kwan, E., & Isabelle, D. A. (2019). Exploring the Profiles of Youth Entrepreneurial Motivation. *Academy of Marketing Conference*.
London, UK. July 2-4, 2019.
- Lu, I., Heslop, L. A., Brouard, F., Kwan, E., & Isabelle, D. A. (2019). Understanding the Heterogeneity of Youth's Entrepreneurial Motivations. *Global Research Symposium on Marketing and Entrepreneurship*.
London, UK. June 27-29, 2019
- Bujaki, M., Durocher, S., Brouard, F., Neilson, L., & Pyper, R. (2015). The Diversity of 'Diversity' in Canadian Accounting Firm Recruitment Websites. *Canadian Academic Accounting Association Annual Conference, 1 (2)*.
May 29, 2015. Toronto, ON. Vol. 1, No. 2. Available online through Social Science Research Network
- Cutler, A., McKay, R., & Brouard, F. (2011). Canadian Sponsorship Scandal: The Whistleblower's Perspective. *Administrative Sciences Association of Canada (ASAC)*.
Case Track, July 2-5, 2011. Montreal, Quebec.

Edited Books

- Brouard, F. (2012). *Canadian Tax Notes and Cases*. Ottawa, Ontario: IPSO FACTO consultants Inc..

Chapters in Edited Books

- Brouard, F., & Pilon, M. (2020). Financial Accountability and Reporting of Foundations in Canada. In Elson, P., Lefebvre, S., Fontan, J.-M. Toronto: University of Toronto Press (Ed.), *Philanthropic Foundations in Canada* (pp. 54-82). Telwell. [Status: Published]
Description: Forthcoming 2020, Submission in June 2018, revised and resubmitted in September 2018, possible publication in Fall 2019).
- Brouard, F., Paré, C., & Lafortune, J.M. (2019). RBO à la conquête du monde ... médiatique et commercial. In Joubert, C. Paré (dir.) (Ed.), *Rock et Belles Oreilles: THE recueil de textes savants*. Lévesque éditeur. [Status: Published]
Description: Updated to published on Jan 17, 2020. Submission in September 2015, revised and resubmitted, accepted for publication in Winter 2018.
- Brouard, F. (2017). L'information et les outils pour la recherche auprès des fondations subventionnaires canadiennes. In Jean-Marc Fontan , Peter R. Elson , Sylvain Lefèvre (Ed.), *Les fondations philanthropiques: De nouveaux acteurs politiques?* (pp. 121-146). Québec: Presse de l'Université de Québec. [Status: Published]
- Lovell, J., Zoellner, D., Guenther, J., Brouard, F., & McMurty, J.J. (2016). Contemporary Aboriginal Settlements: Understanding mixed-market approaches. In A. Taylor, D.B. Carson, P.C. Ensign, L. Huskey, R.O. Rasmussen, F. Saxinger (Ed.), *Settlements at the Edge: Remote Human Settlements in Developed Nations* (pp. 246-269). UK: Edward Elgar Publishing. [Status: Published]
Description: New Horizons in Regional Science, Cheltenham, UK
- Larivet, S., & Brouard, F. (2012). Complaints are a Firm's Best Friend. In Wright, S. (Ed.), *Competitive Intelligence, Analysis and Strategy - Creating Organisational Agility* (pp. 222). Oxford: Routledge. [Status: Published]
Description:
Chapters already published in Journal of Strategic Marketing in 2010 and 2012
- Larivet, S., & Brouard, F. (2012). SMEs' attitude towards SI programmes: evidence from Belgium. *Competitive Intelligence, Analysis and Strategy - Creating Organisational Agility* (pp. 222). Oxford: Routledge. [Status: Published]
Description: Chapters already published in Journal of Strategic Marketing in 2010 and 2012
- Hebb, T., Madill, J., & Brouard, F. (2012). Exploring Social Transformation, Financial Self-Sufficiency and Innovation in Canadian Social Enterprises. In Mook, L., Quarter, J. and Ryan, S. (Eds.), *Business with a Difference : Balancing the Economic and Social* (pp. 223-242). Toronto: University of Toronto Press. [Status: Published]
- Brouard, F., & Larivet, S. (2010). Essay of clarifications and definitions of the related concepts of Social Enterprise, Social Entrepreneur and Social Entrepreneurship. *Handbook of Research in Social Entrepreneurship* (pp. 29-56). Chetelham: Edward Elgar Publishing. [Status: Published]

Other (Non-refereed) Scholarly Publications

Non-refereed books

- Brouard, F. (2023). *Canadian Tax Summary of Knowledge* (2023 ed.) IPSO FACTO consultants Inc..
- Brouard, F. (2022). *Exams Preparation Guide in Taxation for CPA* (3rd ed.). Ottawa: IPSO FACTO consultants Inc..
- Brouard, F. (2022). *Canadian Tax Summary of Knowledge* (2022 ed. ed.). Ottawa: IPSO FACTO consultants Inc..
- Brouard, F. (2020). *Canadian Tax Summary of Knowledge* (2020 ed ed.) IPSO FACTO consultants Inc..
- Brouard, F. (2019). *Exams Preparation Guide in Taxation for CPA* (2nd ed.) IPSO FACTO consultants Inc..

- Brouard, F. (2019). *Canadian Tax Summary of Knowledge* (2019 ed. ed.) IPSO FACTO consultants Inc..
- Brouard, F. (2018). *Canadian Tax Summary of Knowledge* (2018 ed.) IPSO FACTO consultants Inc..
- Brouard, F. (2017). *Canadian Tax Summary of Knowledge*. Ottawa, Ontario: IPSO FACTO consultants Inc..
- Brouard, F. (2016). *Canadian Tax Summary of Knowledge*. Ottawa, Ontario: IPSO FACTO consultants Inc..
- Brouard, F. (2015). *Canadian Tax Notes and Cases*. Ottawa, Ontario: IPSO FACTO consultants Inc..
- Brouard, F. (2015). *Exams Preparation Guide in Taxation for CPA* IPSO FACTO consultants Inc..
- Brouard, F. (2015). *Canadian Tax Summary of Knowledge*. Ottawa, Ontario: IPSO FACTO consultants Inc..
- Brouard, F. (2013). *Canadian Tax Notes and Cases* IPSO FACTO consultants Inc..
- Brouard, F. (2011). *Canadian Tax Notes and Cases*. Ottawa, Ontario: IPSO FACTO consultants Inc..
- Brouard, F. (2010). *Canadian Tax Notes and Cases*. Ottawa, Ontario: IPSO FACTO consultants Inc..

Chapters in non-refereed books

- Brouard, F., & Paré, C. (2024). La diffusion de l'humour en temps de pandémie. Under Review, *Les arts vivants au Québec pendant la pandémie: bilan et perspectives*.
- Brouard, F. (2023). Advancing the Critical Role of T3010 and Civic Data in Community Building. *State of Canada's Cities - At the Crossroads Maximizing Possibilities*. Canadian Urban Institute.
- Cadieux, L., Lecorne, V., Gratton, P., Grenier, J., & Brouard, F. (2020). Génération Repreneurs: Pérenniser le Québec inc.. *Génération Repreneurs: Pérenniser le Québec inc.*. Centre de transfert d'entreprise du Québec.

Other Scholarly Publications

- 2021: Brouard, F., J.-P. Baril-Guérard (2021). *Haute démolition*.
- 2018: Brouard, F., *Liste des spectacles d'humour francophone au Québec - année 2018 (prévisions)*. Note de l'OH, Observatoire de l'humour, 17 mars, 6p.
- 2018: Brouard, F., *Liste des spectacles d'humour francophone au Québec - année 2017*. Note de l'OH, Observatoire de l'humour, 17 mars, 7p.
- 2017: Brouard, F., *Liste du corpus d'étude de prestations d'humour francophones au Québec*. Note de l'OH, Observatoire de l'humour, 27 février, 23p.
- 2017: Brouard, F., *Liste de livres québécois portant sur l'humour francophones au Québec*. Note de l'OH, Observatoire de l'humour, 22 février, 6p.
- 2017: Brouard, F., *Liste des thèses de doctorat et de mémoires de maîtrise associés à l'humour au Québec*. Note de l'OH, Observatoire de l'humour, 26 janvier, 5p
- 2017: Brouard, F., I. Ménard (dir.): *Tomber en humour - Confessions d'humoristes sur leur art, la vie et autres petites choses pas nécessairement drôles*.
- 2017: Brouard, F., *Liste du corpus d'étude de prestations d'humour francophones au Québec*. Note de l'OH, Observatoire de l'humour, 27 février, 23p.
- 2017: Brouard, F., *Liste de livres québécois portant sur l'humour francophones au Québec*. Note de l'OH, Observatoire de l'humour, 22 février, 6p.
- 2015: Brouard, F., *List of the Main and Secondary Laws for Social Enterprises in Ontario, SCSE-CSES Note*. Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), May 5, 2p.
- 2015: McMurtry, J.J., Brouard, F., Elson, P., Hall, P., Lionais, D., Vieta, M. *Social Enterprise in Canada: Context, Models and Institutions, ICSEM Working Papers*. No. 04, Liège, Belgium : The International Comparative Social Enterprise Models (ICSEM) Project, 31p.
- 2015: Brouard, F., & Glass, J., *Emerging Information and Reporting Issues for Grantmaking Foundations, Discussion Paper*. Laboratoire Montréalais de Recherche sur la Philanthropie Canadienne / Montreal Research Laboratory on Canadian Philanthropy (LMRPC/MRLCP); Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), May, 48p.
- 2015: Brouard, F., C. Bisson (2013). *Guide de gestion stratégique de l'information pour les PME*. Revue internationale PME, vol. 28, no 2, p.191-192.
- 2010: Brouard, F., S. Larivet (2009). *Intelligence économique Enquête dans 100 PME*. Revue internationale PME, vol. 23, no. 1, p.158-159

Other Publications

Other Publications

- 2022: Brouard, F., Pilon, M., & Webb, A., *Hockey Canada – Financial Information: Issues about transparency and responsiveness*. Brouard, F., Pilon, M., Webb, A. (2022). Hockey Canada – Financial Information: Issues about transparency and responsiveness, PARG #2022-12NR, Research Note, Professional Accounting Research Group (PARG), Sprott School of Business, Carleton University, October 11, 37p
- 2022: Brouard, F., *Statistiques sur l'industrie de l'humour*. Brouard, F. (2022). Statistiques sur l'industrie de l'humour, *Sérieux? Humour: Savoirs et pratiques*, 1(1), 84-91.
- 2022: Brouard, F., *Thèses et mémoires*. Brouard, F. (2022). Thèses et mémoires, *Sérieux? Humour: Savoirs et pratiques*, 1(1), 92-100.
- 2020: Brouard, F., *Crisis Management and COVID-19*. Sprott Business Insights

- 2020: Brouard, F., *Préambule / Preamble*. L'Année Philanthropique / The Philanthropic Year, Hors-Série / Special Edition #1, Mai / May 2020
- 2020: Brouard, F., *La crise provoquée par la COVID-19 et l'impact financier en philanthropie*. L'Année Philanthropique / The Philanthropic Year, Hors-Série / Special Edition #1, Mai / May 2020
- 2019: Brouard, F., *Pas envie de faire vos impôts? Dix questions à poser à votre futur comptable*. La Conversation, 13 mars, 3p. and «Dread doing your taxes? Some tips on hiring someone to take over», The Conversation, 13 March, 3p
- 2015: Elson, P., & Brouard, F., *Éditorial – Un avenir prometteur / Editorial - A Promising Future*. ANSERJ - Revue canadienne de recherche sur les OSBL et l'économie sociale / Canadian journal of nonprofit and social economy research, vol. 6, no 1, Printemps/Spring, p.3-5.
- 2015: Brouard, F., *Characteristics and Definition of Social Entrepreneurs, SCSE-CSES Note*. Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), December 11, 2p.
- 2015: Brouard, F., *Characteristics and Definition of Social Enterprises, SCSE-CSES Note*. Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), December 11, 2p.
- 2015: Brouard, F., *Characteristics and Definition of Social Entrepreneurship, SCSE-CSES Note*. Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), December 11, 2p.
- 2015: Brouard, F., *Relationships between SE Concepts (Social Enterprise, Social Entrepreneur, Social Entrepreneurship), SCSE-CSES Note*. Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), December 11, 2p.
- 2015: Glass, J., & Brouard, F., *Public Information Sharing and Transparency among Grantmaking Foundations, Discussion Paper*. Laboratoire Montréalais de Recherche sur la Philanthropie Canadienne / Montreal Research Laboratory on Canadian Philanthropy (LMRPC/MRLCP); Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), May, 21p.
- 2014: Brouard, F., & Elson, P., *Éditorial - La force du libre accès / Editorial - The Power of Open Access*. ANSERJ - Revue canadienne de recherche sur les OSBL et l'économie sociale / Canadian journal of nonprofit and social economy research, vol. 5, no 2, Automne/Autumn, p.3-6.
- 2014: Brouard, F., & Elson, P., *Editorial - International Comparison of Social Enterprise Models (ICSEM) / Éditorial – Comparaison internationale des modèles d'entreprises sociales*. ANSERJ - Revue canadienne de recherche sur les OSBL et l'économie sociale / Canadian journal of nonprofit and social economy research, vol. 5, no 1, Printemps/Spring, p.3-5.
- 2014: Brouard, F., *Report on T3010 Users Research Day, SCSE-CSES Discussion Paper*. Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), August, 13p
- 2014: Brouard, F., *Suggestions to Improve the T3010 for Research, SCSE-CSES Discussion Paper*. Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), May, 12p
- 2014: Brouard, F., *T3010 Challenges for Research, SCSE-CSES Discussion Paper*. Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), May, 51p.
- 2014: Brouard, F., *Note on Financial Statements for Social Enterprises*. EMES & ICSEM & SCSE/CSES, EMES: International Research Network, International Comparative Social Enterprise Models (ICSEM), Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES) February, 17p.
- 2013: Brouard, F., & Elson, P., *Editorial - Register and be Counted / Éditorial – S'inscrire pour compter*. ANSERJ - Revue canadienne de recherche sur les OSBL et l'économie sociale / Canadian journal of nonprofit and social economy research, vol. 4, no 2, Automne/Autumn, p.3-4.
- 2013: Elson, P., & Brouard, F., *Editorial - Social Enterprise Gains Momentum / Éditorial – Les entreprises sociales prennent leur envol*. ANSERJ - Revue canadienne de recherche sur les OSBL et l'économie sociale / Canadian journal of nonprofit and social economy research, vol. 4, no 1, Printemps/Spring, p.3-5.
- 2012: Brouard, F., & Elson, P., *Editorial - Articles of Quality / Éditorial - Des articles de qualité*. ANSERJ - Revue canadienne de recherche sur les OSBL et l'économie sociale / Canadian journal of nonprofit and social economy research, vol. 3, no 2, Automne/Fall, p.3-5.
- 2012: Elson, P., & Brouard, F., *Editorial - Austerity and the social economy / Éditorial - L'austérité et l'économie sociale*. ANSERJ - Revue canadienne de recherche sur les OSBL et l'économie sociale / Canadian journal of nonprofit and social economy research, vol. 3, no 1, Printemps/Spring, p.3-4.
- 2011: Elson, P., & Brouard, F., *Editorial - International Year of Cooperatives / Éditorial - Année internationale des coopératives*. ANSERJ - Revue canadienne de recherche sur les OSBL et l'économie sociale / Canadian journal of nonprofit and social economy research, vol. 2, no 2, Automne/Fall, p.3-5.
- 2011: Elson, P., & Brouard, F., *Editorial: A good start / Éditorial - Un bon départ*. ANSERJ - Revue canadienne de recherche sur les OSBL et l'économie sociale / Canadian journal of nonprofit and social economy research, vol. 2, no 1, Printemps/Spring, p.3-4.
- 2010: Brouard, F., & Elson, P., *Éditorial - Une nouvelle revue - un nouveau départ / Editorial: A new journal - A new beginning*. ANSERJ - Revue canadienne de recherche sur les OSBL et l'économie sociale / Canadian journal of nonprofit and social economy research, vol. 1, no 1, Automne/Fall, p.3-7.
- 2010: Brouard, F., & Larivet, S., *Profession: Philanthrope*. Le Philanthrope / The Philanthropist, vol. 23, no 2, p.166-175.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Academic PRJ

2021 – 2022: SÉRIEUX? Humour: Savoirs et pratiques (Regional).

Editor: Associate Editor

2010 – 2015: Canadian Journal of Nonprofit and Social Economy Research (National). Founding Co-editor

Editor: Conference Proceedings

2010: Spratt PhD Symposium (Local).

Editor: Guest Editor of Journal

2010 – 2013: Revue internationale PME (International). With F. Janssen and S. Bacq for a special issue on Entrepreneuriat social / Social entrepreneurship.

Presentations

Papers Presented at Conferences

Refereed

Mansurov, A., Bujaki, M., & Brouard, F. (2024). *Students' Perceptions of Diversity, Equity and Inclusion in an Accounting Firms's Recruitment Photos*. Canadian Academic Accounting Association Annual Conference, Halifax, Canada-Nova Scotia.

Webb, A., Orr, K., Warner, M., & Brouard, F. (2024). *Changing the Game: Managing Sports based Multi-stakeholder partnerships*. Academy of Management Annual Meeting, Chicago, Illinois.

Brouard, F., Pilon, M., & Webb, A. (2023). *Hockey Canada Crisis: Financial information and governance*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Toronto, Canada-Ontario.

Brouard, F., Lialien, M., & Brown, N. (2023). *Definition of Northern / Rural / Remote / Peripheric Communities in a Philanthropic Context*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Toronto, Canada-Ontario.

Cascante, I., Litalien, M., & Brouard, F. (2023). *Collaboration, coopération, cocréation: études de cas sur les innovations des services sociaux pendant la COVID-19*. Association francophone pour le savoir (ACFAS), Montreal, Canada-Ontario.

De Champlin, C., Brouard, F., & Pilon, M. (2023). *Système de santé: comparaison du Québec et de l'Ontario, 90e Congrès de l'ACFAS*. Association francophone pour le savoir (ACFAS), Montreal, Canada-Ontario.

Lialien, M., Brouard, F., Brown, N., & Vodden, K. (2023). *Roundtable CORNPhil - How about Northern and Rural Philanthropy?* Association for Nonprofit and Social Economy Research (ANSER-ARES), Toronto, Canada-Ontario.

Perreault, L., Brouard, F., & Webb, A. (2022). *Mapping of Foundations associated with Professional Sports Clubs: A Review*. Association for Nonprofit and Social Economic Research, Virtual, Virtual.

Webb, A., Orr, K., Warner, M., & Brouard, F. (2022). *Changing the Game: Workforce Integration Multi-Stakeholder Partnerships in Action*. European Association of Sport Management (EASM) conference, Innsbruck, Austria.

Webb, A., Cloutier, A., & Brouard, F. (2022). *Social Innovations Associated with Professional Sport: The Case of FC Barcelona's Barça Museum*. Administrative Sciences Association of Canada, Halifax, Canada-Nova Scotia.

De Champlain, C., Pilon, C., Brouard, F., & Bourget-Caouette, B. (2022). *Système de santé et de services sociaux au Québec*. Association francophone pour le savoir, Laval, Canada-Quebec.

Adams, G. & Brouard, F. (2021). *Rural Social Enterprises Ecosystem: an integrated framework*. Association for Nonprofit and Social Economic Research Conference, Virtual, Virtual.

Berge, S. T., Brouard, F., Douglas, H., Ensign, P. C., & Lionais, D. (2021). *Rural Social Enterprise: Our Experiences and Yours!* Babson College Entrepreneurship Research Conference, Virtual, Virtual.

Brouard, F., Litalien, M., Brown, N., Gibson, R., Lindgren, A., Perreault, L., Kosovac Sykes, A., Webb, A. (2021). *Roundtable Philab Ontario: Activities and Projects*. Association for Nonprofit and Social Economic Research Conference, Virtual, Virtual.

Ensign, P. C., Brouard, F., Douglas, H., Lionais, D., & Berge, S. (2021). *Rural Social Enterprises Ecosystem: a research project*. Association for Nonprofit and Social Economic Research Conference, Virtual, Virtual.

Paré, C. & Brouard, F. (2021). *Les festivals d'humour comme trame d'écosystèmes entrepreneuriaux*. Écosystèmes entrepreneuriaux: acteurs et interactions, Virtual, Virtual.

Pilon, M. & Brouard, F. (2021). *Accountability Dichotomies in Nonprofit Research: A Review of the Literature*. Annual International Society for Third-Sector Research Conference, Virtual, Virtual.

Pilon, M. & Brouard, F. (2021). *Conceptualising Nonprofit Accountability: Proposing an Accountability System to Manage Stakeholder Demands*. Annual International Society for Third-Sector Research Conference, Virtual, Virtual.

Pilon, M. & Brouard, F. (2021). *Managing accountability in health care: An investigation into negotiation tactics*. International EIASM Public Sector Conference, Virtual, Virtual.

Pilon, M. & Brouard, F. (2021). *Accountability information strategies in the health care sector: consistency or contradictions?* International EIASM Public Sector Conference, Virtual, Virtual.

- Neal, J.A., Bujaki, M., Brouard, F., & Durocher, S. (2020). *Constructing the Identity of Canada's Merged Accounting Profession through Pre- and Post-Merger National Accounting Magazine Cover Images*. Qualitative Accounting Research Symposium, Guelph, Canada-Ontario.
Description: University of Guelph, November 27 2020
- Bujaki, M., Neilson, L., Durocher, A., & Brouard, F. (2019). *A content and semiotic analysis of the inclusiveness of Canadian accounting firm recruitment website photographs*. Alternative Accounts, Kingston, Canada-Ontario.
Description: May 11, 2019.
- Paré, C. & Brouard, F. (2019). *Écosystème de l'industrie de l'humour francophone au Québec*. Association francophone pour le savoir, Gatineau, Canada-Quebec.
- Aray, Y. & Brouard, F. (2017). *Mission Changes of Hybrid Organizations: Drift, Dilution, Evolution or Something Else?* EMES International Research Conference on Social Enterprise, Louvain-la-Neuve, Belgium.
Description: July 3 - 6
- Aray, Y. & Brouard, F. (2017). *Mission Changes of Hybrid Organizations: Drift, Dilution, Evolution or Something Else?* Association for Nonprofit and Social Economy Research (ANSER-ARES), Toronto, Canada-Ontario.
Description: Ryerson University, May 31 - June 1.
- Brouard, F. & Glass, J. (2017). *Emerging Information and Reporting Issues for Grantmaking Foundations*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Toronto, Canada-Ontario.
Description: Ryerson University, May 31 - June 1.
- Pilon, M. & Brouard, F. (2017). *Dimensions and Conceptions of Nonprofit Accountability: A Comprehensive System*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Toronto, Canada-Ontario.
Description: Ryerson University, May 31 - June 1
- Brouard, F. & Paré, C. (2016). *Écosystème de l'industrie de l'humour francophone au Québec*. Association Internationale de recherche en entrepreneuriat et PME (AIREPME), Trois-Rivières, Canada-Quebec.
Description: October 26-28.
- Bujaki, M., Neilson, L., Durocher, S., & Brouard, F. (2016). *Photographic Depictions of Gender and Ethnic Diversity in Canadian Accounting Firm Recruitment Documents*. Tunisian Accounting and Finance Professors Association of North America, Monastir, Tunisia.
Description: Summer Accounting and Finance Conference, July 17 2016
- Pilon, M. & Brouard, F. (2016). *Dimensions and Definitions of Nonprofit Accountability: A Comprehensive System*. Association for Research in Nonprofit Organizations and Voluntary Action (ARNOVA), D.C., Washington.
Description: November 17-19.
- Brouard, F., Bujaki, M., & Durocher, S. (2016). *Attracting Potential Professional Accountants before and after the CPA Merger in Canada*. Canadian Academic Accounting Association Annual Conference, St. John's, Canada-Newfoundland.
Description: June 2 (2016 Accounting Perspectives special event).
- Brouard, F. & Glass, J. (2016). *Emerging Information and Reporting Issues for Grantmaking Foundations*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Calgary, Canada-Alberta.
Description: University of Calgary, June 1-3.
- Brouard, F. & Glass, J. (2016). *Cadre d'analyse et enjeux liés à l'information pour les fondations subventionnaires canadiennes*. Association francophone pour le savoir (ACFAS), Montréal, Canada-Quebec.
Description: May 13, 84e Congrès de l'ACFAS 2016
- Brouard, F., Bujaki, M., & Durocher, S. (2016). *Recruitment of Prospective Professional Accountants before and after CPA Merger in Canada*. Canadian Academic Accounting Association Annual Conference, St. John's, Canada-Newfoundland.
Description: June 2, 2016
- Aray, Y. & Brouard, F. (2015). *Similarities and Differences in Business Model Components for Social Entrepreneurial Organizations*. EMES International Research Conference on Social Enterprise, Helsinki, Finland.
Description: June 29 - July 3
- Brouard, F., Mcmurtry, J.J., Elson, P., Hall, P., & Lionais, D. (2015). *Social Enterprises Models in Canada - National Report*. International Comparative Social Enterprise Models Project Meeting, Helsinki, Finland.
- Durocher, S., Bujaki, M., & Brouard, F. (2015). *Managing legitimacy to attract Millennial employees*. European Accounting Association Annual Congress, Glasgow, Scotland.
Description: 38th conference from April 28-30.
- Mcmurtry, J. J., Brouard, F., Elson, P., Hall, P., Lionais, D., Vieta, M. (2015). *Social Enterprises in Canada: Context, Models and Institutions*. EMES International Research Conference on Social Enterprise, Helsinki, Finland.
Description: June 29 - July 3.
- Aray, Y. & Brouard, F. (2015). *Business Models of Social Entrepreneurial Organizations: Typology*. Association for Research in Nonprofit Organizations and Voluntary Action (ARNOVA), Chicago, Illinois.
Description: November 19-21

- Brouard, F., Bujaki, M., Durocher, S., & Neilson, L. (2015). *A theoretical framework of professional accountant identity formation and directions for future research*. Telfer Annual Regional Conference on Accounting and Finance, Ottawa, Canada-Ontario.
Description: May 15
- Brouard, F., Bujaki, M., Durocher, S., & Neilson, L. (2015). *A theoretical framework of professional accountant identity formation and directions for future research*. Biennial Symposium on Accounting Ethics - Accounting Professionalism, Toronto, Canada-Ontario.
Description: Also listed as: "Identity, Image and Stereotypes: Exploring Exchange Dynamics involving the Accounting Profession and Directions for Future Research", University of Waterloo, Toronto, April 16-18. Presented by Dr. Brouard.
- Brouard, F. & Aray, Y. (2015). *Business Model Components for Social Entrepreneurial Organizations*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Ottawa, Canada-Ontario.
- Brouard, F., Elson, P., & Parachin, A. (2015). *The Governance and Policy Landscape for Canadian Foundations: Issues on the Edge of Change / La gouvernance et le paysage politique des fondations canadiennes: enjeux et voies de changement*. Grantmaking Foundations / Fondations Subventionnaires, Montreal, Canada-Quebec.
Description: Grantmaking Foundations / Fondations Subventionnaires 2015 Inaugural Conference, Laboratoire Montréalais de Recherche sur la Philanthropie Canadienne / Montreal Research Laboratory on Canadian Philanthropy (LMRPC/MRLCP)
- Brouard, F. & Paré, C. (2015). *Profile and Ecosystem of the Francophone Humour Industry in Québec*. International Society for Humor Studies (ISHS), Oakland, California.
Description: June 29 - July 3.
- Bujaki, M., Durocher, S., Brouard, F., & Neilson, L. (2015). *Diversity of 'Diversity' in Canadian Accounting Firm Recruitment Websites*. Canadian Academic Accounting Association Annual Conference, Toronto, Canada-Ontario.
Description: May 28-31
- Bujaki, M., Neilson, L., Durocher, S., & Brouard, F. (2015). *Photographic Depictions of Gender and Ethnic Diversity in Canadian Accounting Firm Recruitment Documents*. American Accounting Association (AAA) Annual Meeting, Chicago, Illinois.
Description: August 2015
- Bujaki, M., Neilson, L., Durocher, S., & Brouard, F. (2015). *The Diversity of 'Diversity' in Canadian Accounting Firm Recruitment Websites*. Alternative Accounts, Ottawa, Canada-Ontario.
Description: April 16-18
- Pilon, M. & Brouard, F. (2015). *Exploration of Conceptual Issues in Accountability and Governance: A Nonprofit Context*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Ottawa, Canada-Ontario.
Description: University of Ottawa, June 3-5
- Brouard, F., Bujaki, M., Durocher, S., & Neilson, L. (2015). *Identity, Image and Stereotypes: Exploring Exchange Dynamics involving the Accounting Profession and Directions for Future Research*. Telfer Annual Regional Conference on Accounting and Finance, Ottawa, Canada-Ontario.
Description: May 15 2015
- Brouard, F., Lionais, D., & McMurtry, J.J. (2014). *Social Enterprises Models - Canadian Perspective*. Western ICSEM Symposium, La Roche-en-Ardenne, Belgium.
- Bujaki, M., Brouard, F., Durocher, S., Neilson, L., & Pyper, R. (2014). *Depictions of Diversity in Canadian Accounting Firm Recruitment Documents: Gender and Race in Photos and Text*. International Conference on Diversity in Organizations, Communities, and Nations, Vienna, Austria.
Description: July 9-11
- Brouard, F., Polovina-Vukovic, D., & Hebb, T. (2014). *Teaching Financial Management for Philanthropy and NonProfits*. Association for Nonprofit and Social Economy Research (ANSER-ARES), St. Catharines, Canada-Ontario.
Description: Brock University, May 28-30.
- Neilson, L. & Brouard, F. (2014). *Small Charities: An Analysis of Change in Fundraising Activities*. Sprott-Telfer Forum, Ottawa, Canada-Ontario.
Description: April 24, Ottawa. Co-presented with Dr. Brouard.
- Brouard, F. & Neilson, L. (2013). *Small Charities: An Analysis of Change in Fundraising Activities*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Victoria, Canada.
Description: June 5-7
- Madill, J. & Brouard, F. (2013). *Financial and Marketing Strategies of Social Enterprises*. PRI Academic Network Conference, Paris, France.
Description: November 13-15
- Brouard, F. & Neilson, L. (2012). *Development of a Social Enterprises Database: Challenges in integrating T3010 data*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Waterloo, Canada.
Description: University of Waterloo, May 30 - June 1
- Brouard, F. & Larivet, S. (2012). *Qui vèllera vèllera. Exploration de l'intention de participer à un programme d'intelligence stratégique*. Journées Veille stratégique, scientifique et technique, Ajaccio, France.
- Brouard, F., Larivet, S., & Sakka, O. (2012). *Defis et actions pour relever l'entrepreneuriat social (Actions to take up social entrepreneurship challenges)*. l'ère journée de l'Entrepreneuriat Social, Paris, France.
Description: September 10, 2012.

Brouard, F. & Neilson, L. (2011). *Development of a Social Enterprises Database: Issues and Challenges*. Association for Research in Nonprofit Organizations and Voluntary Action (ARNOVA), Toronto, Canada-Ontario.

Description: Presented by Dr. Brouard as part of panel on 'Intrepid Exploration: Capturing the nature and activities of social enterprises', November 17-19.

Dolan, S., Brouard, F., & Riding, A. (2011). *Financing growing firms and the importance of banking relationships*. AGSE International Entrepreneurship Research Exchange, Melbourne, Australia.

Description: Swinburne University of Technology, Melbourne, Australia, February 1-4.

Larivet, S. & Brouard, F. (2011). *Strategic Intelligence attitudes in Belgian SME's: a survey*. Academy of Marketing Conference, Liverpool, United Kingdom.

Description: Competitive Intelligence, Analysis & Strategy track, University of Liverpool, Management School (ULMS), July 5-7

Brouard, F. & Larivet, S. (2011). *Social Enterprises; Definitions and Boundaries*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Fredericton, Canada-New Brunswick.

Description: University of New Brunswick, June 1-3.

Brouard, F., Larivet, S., & Sakka, O. (2011). *Défis et actions pour développer l'entrepreneuriat social*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Fredericton, Canada-New Brunswick.

Description: University of New Brunswick, June 1-3.

Brouard, F., Sakka, O., & Larivet, S. (2010). *Essai de représentation et de définition du concept de participation citoyenne (Representing and defining the concept of citizen participation)*. Association francophone pour le savoir (ACFAS), Montreal, Canada-Quebec.

Description: Presented at the 78th ACFAS conference, May 13-14, Montreal, Quebec, Canada.

Brouard, F. & Larivet, S. (2010). *Social Entrepreneurs: Definitions and Boundaries*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Montreal, Canada-Quebec.

Description: Concordia University, June 2-4

Brouard, F. (2010). *Earned income for financial self sufficiency*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Montreal, Canada-Quebec.

Description: Montréal (Concordia University), June 2-4.

Non-Refereed

Day, P., Brouard, F., & Litalien, M. (2023). *Rural and Northern Philanthropy - Practices of philanthropy in a rural context: Definitions and Ecosystem Framework*. Philab Atlantic Hub Webinar, Corner Brook, Canada-Newfoundland and Labrador.

Litalien, M., Pilon, M., & Webb, A. (2023). *Hockey Canada crisis: financial information and governance*. PARG Accounting Research Discussion, Ottawa, Canada-Ontario.

Brouard, F. & Litalien, M. (2023). *Definitions of Northern / Rural / Remote / Peripheric Communities in a Philanthropic Context*. PARG Accounting Research Discussion, Ottawa, Canada-Ontario.

Other Presentations

Keynote Address

2014: Sommet économique rural de l'Ontario / Rural Economic Summit of Ontario, Rockland, Canada-Ontario. Le Groupe Convex: Une entreprise sociale, Banquet 10e anniversaire, May 1. (Invited guest speaker)

2014: Conseil de la coopération de l'Ontario, Ottawa, Canada-Ontario. «Revisiter les obstacles perçus dans l'entrepreneuriat social», Congrès 2014, September 25

Presentation

2022: Sprott Research Seminar. Brouard, F. (2022). Philanthropy, Tax, Health, Accounting Profession, History and Humour, Sprott Research Seminar - Sabbatical Returns, (virtual), February 17.

2022: Sprott Graduate Research Orientation Session. Brouard, F. (2022). PARG - SCSE/CSSES - GRIH: opportunities for student engagement, Sprott Graduate Research Orientation Session, Ottawa, September 9.

2021 – 2022: Institut de recherche sur les PME (INRPME) UQTR, Virtual, Virtual. Duhamel, M., Brouard, F. (2021). L'influence des facteurs fiscaux sur les transferts de PME québécoises et canadiennes, Webinaire INRPME, Institut de recherche sur les PME (INRPME) UQTR, (vidéoconférence), 25 février

2021: Université Toulouse 1 Capitole, Virtual, Virtual. Brouard, F. (2021). Entreprise sociales: Défis et actions, Webinaire sur l'entrepreneuriat social, Université Toulouse 1 Capitole (France) (vidéoconférence), 28 janvier.

2021: Observatoire des médiations culturelles, Virtual, Virtual. Brouard, F., Paré, C. (2021). La diffusion de l'humour en temps de pandémie, Séminaire OMEC, Observatoire des médiations culturelles (OMEC), (vidéoconférence), 31 mars

2021: Philab Ontario Hub Regional Conference, Virtual, Virtual. Litalien, M., Brown, N., Brouard, F., Adams, G. (2021). Exploration of Northern Philanthropic Ecosystem in Canada, Philab Ontario Hub Regional Conference 2021, Session 2: Sector-specific challenges, (virtual), 12 May

2021: Philab Ontario Hub Regional Conference, Virtual, Virtual. Brouard, F., Perreault, L., Webb, A. (2021). Examination of foundations in a

post-COVID era: Illustration with Sports and Arts Sectors, Philab Ontario Hub Regional Conference 2021, Session 2: Sector-specific challenges, (virtual) 12 May.

- 2021: Séminaire Joseph-Chicha, Institut de recherche sur les PME, Virtual, Virtual. Duhamel, M., Cadieux, L., Brouard, F., Bérubé, C. (2021). Impacts économiques du repreneuriat: Estimation de la menace fantôme et du spectre de fermeture des intentions de transferts de PME au Québec et au Canada, Séminaire Joseph-Chicha, Institut de recherche sur les PME (INRPME) UQTR (vidéoconférence), 26 novembre.
- 2020: Canadian Association of Gift Planners), Virtual, Virtual. «Philanthropie durant et après la crise de la COVID-19», Événement ACPDP/CAGP, (Association canadienne des professionnels en dons planifiés / Canadian Association of Gift Planners), Montréal (vidéoconférence)
- 2020: PARG Research Discussion Session, Ottawa, Canada-Ontario. «COVID-19 Crisis within Arts and Culture Sector and Comedy Industry in Québec and Canada»
- 2020: Séminaire de l'OH (Observatoire de l'humour), Virtual, Virtual. «L'industrie de l'humour et le secteur des arts et de la culture au Québec et au Canada: Faire face à la crise de la COVID-19»
- 2020: Centre de transfert d'entreprise du Québec, Virtual, Virtual. Brouard, F., Duhamel, M., Dumont, J.-P., Lafrance-Girard, A., Lecorne, V., Thuot, J.-F. (2020). «Transfert d'entreprise familial: étude sur les enjeux fiscaux
- 2020: Session de formation Société Santé en français, Virtual, Virtual. Gouvernance et gestion financière
- 2019: PARG Research Discussion Session, Ottawa, Canada-Ontario. Brouard, F., Paré, C. (2019). «Women in the Québec Francophone Comedy Industry: Ladies in the "Old Boys' Club"», PARG Research Discussion Session, Ottawa, February 14.
- 2019: ESDC/EDSC WISE/ESIT Workshop, Gatineau, Canada-Quebec. Brouard, F. (2019). «WISE: Some observations from a research perspectives / ESIT: Quelques remarques du point de vue de la recherche», 2019 ESDC/EDSC WISE/ESIT Workshop, Gatineau, February 22.
- 2019: CREWW Community Networking Session, Ottawa, Canada-Ontario. Brouard, F., Nardon, L., Neilson, L. (2019). «Academic Paper Review Process», CREWW Community Networking Session, Ottawa, February 25.
- 2018: Sommet régional du repreneuriat de Gatineau, Gatineau, Canada-Quebec. Brouard, F., Gaudet, E., Lévesque, G., Paulhus Gosselin, M., Turcot, G. «Rendez-vous d'experts: Comment bien s'entourer pour réussir son transfert?», February 23. (Panelist)
- 2018: PARG Accounting Research Discussion, Ottawa, Canada-Ontario. «Research Overview», March 12.
- 2018: CREWW Annual Research Forum, Ottawa, Canada-Ontario. «Women in the Québec Francophone Comedy Industry: Case Studies of Ladies in the "Old Boys' Club"», CREWW 6th Annual Research Forum, October 30.
- 2018: Research Seminar, Sprott School of Business, Ottawa, Canada-Ontario. Accounting group & PARG - Research Overview - Brouard, F., Firoozi, M., Pollanen, R., Sakka, O., Becker, H., Bujaki, M., Ruff, K. (2018).
- 2016: Responsible Investing in Canada Conference, Ottawa, Canada-Ontario. With Madill, J. «Social Enterprises: Financial and Marketing Strategies Utilized and Tensions», Carleton University, October 19-20.
- 2015: Sprott-Telfer Forum, Ottawa, Canada-Ontario. «SCSE/SCSE: Transition for the Future», Carleton University, April 22.
- 2015: London School of Economics, London, United Kingdom. Durocher, S., Bujaki, M., Brouard, F. (2015). «Managing legitimacy to attract Millennial employees» January 28.
- 2014: Teaching and Learning Symposium, Ottawa, Canada-Ontario. Raggo, P., Brouard, F. «Teaching Online Graduate Courses for Philanthropy and NonProfits», Carleton University, October 29.
- 2011: European Research Institute on Cooperative and Social Enterprises (EURICSE), Trento, Italy. «Exploring Dimensions of Canadian Social Enterprises», EURICSE Research Seminars, University of Trento, February 16.
- 2011: Sprott-Telfer Forum, Ottawa, Canada-Ontario. «Sprott Centre for Social Enterprise / Centre Sprott pour les entreprises sociales», April 21.
- 2011: Association canadienne-française pour l'avancement des sciences, Sherbrooke, Canada-Quebec. Brouard, F., Larivet, S. «Mieux comprendre les enjeux de l'entrepreneuriat social pour entreprendre autrement» / [For a better understanding of issues in social entrepreneurship], 79e Congrès de l'ACFAS, Colloque La participation des citoyens, Association canadienne-française pour l'avancement des sciences (ACFAS), Université de Sherbrooke / Bishop University, May 11.
- 2010: Sprott School of Business, Ottawa, Canada-Ontario. Dialogue with Dr Muhammad Yunus
- 2010: Sprott PhD Symposium, Ottawa, Canada-Ontario. «A Few Ideas about Doctoral Studies and Life»
- 2010: Association francophone pour le savoir, Montreal, Canada-Quebec. With Larivet, S., Sakka, O. «Essai de représentation et de définition du concept de participation citoyenne» / [Essay on defining the concept of Citizen participation], 78e Congrès de l'ACFAS, Colloque 611 La participation des citoyens à l'espace public, Université de Montréal, May 13-14.

Contract or Other Research

Research Grants and Awards

Grants

- 2023: Brouard, F., Tabri, N., Bujaki, M., & Wohl, M., Realise Seed Grant (\$12,000.00), Co-Principal Investigator, PRI-Carleton University. Money Matters: Assessing the Consequences of a Financial Self-Concept for Tax Attitudes and Compliance. [Status: Funded]
- 2022: Brouard, F. Research Grants Program (\$9,800.00 Pending), Principal Investigator, PRI-Canadian Academic Accounting Association (CAAA).

[Status: Pending]

2022: Brouard, F. SSHRC Institutional Grant - Explore Grant (\$7,000.00), Principal Investigator, Nipissing University. Ethnic Philanthropy in Canada.

[Status: Funded]

2021: Brouard, F. Partnership Grant, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021: Brouard, F. Partnership Grant (\$25,000.00), Principal Investigator, Université du Québec à Montréal. [Status: Funded]

2021: Brouard, F. Sprott Faculty Teaching Award (\$1,500.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2019: Brouard, F. CPA Research Agreement (\$48,000.00), Principal Investigator, Chartered Professional Accountants Ontario. [Status: Funded]

2018: Brouard, F. Faculty Research Award (\$5,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2018: Brouard, F. Faculty Research Award (\$5,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2017: Brouard, F. Research Achievement Award (\$15,000.00 Not Funded), Principal Investigator, Carleton University, CORIS. [Status: Not Funded]

2015: Brouard, F. Partnership Development Grant, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2015: Brouard, F. Partnership Development Grant (\$3,500.00), Principal Investigator, Université du Québec à Montréal. [Status: Funded]

2015: Brouard, F. Research Achievement Award (\$15,000.00 Not Funded), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Not Funded]

2013: Brouard, F. Research Achievement Award, Grantee, Carleton University, CORIS. [Status: Not Funded]

Other Professional Activities

Consulting Experience

2012: Office of the Comptroller General, Consultant. Strategic Planning Exercise Session

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2023: Canadian Academic Accounting Association (CAAA).

2015: Association for Nonprofit and Social Economy Research (ANSER-ARES), Ottawa, Canada-Ontario. Brouard, F., Charron, A., Groundwater, S., Williamson, A. «Roundtable: T3010 Modernization Project», University of Ottawa, June 3-5. (Organizer).

2015: Association for Nonprofit and Social Economy Research (ANSER-ARES), Ottawa, Canada-Ontario. Brouard, F., Mook, L., Speevak, P. «Roundtable: Teaching Financial Management for NonProfits», University of Ottawa, June 3-5. (Co-organizer)

Academic Conference: Moderator / Facilitator

2023: Association for Nonprofit and Social Economy Research (ANSER-ARES). - Roundtable CORNPhil - How about Northern and Rural Philanthropy?

- Panel on Northern and Rural Philanthropy

2021: Entreprises sociales d'insertion par le travail, Virtual, Virtual. Brouard, F.(2021). Workshop on WISE: Work Integration Social Enterprises / ESIT: Entreprises sociales d'insertion par le travail, 2021 ESDC/EDSC WISE/ESIT Workshop, (virtual/virtuel), February 10-11. (facilitator / animateur)

2020: Shifting Landscapes Virtual Roundtable, The Public Accounting Profession and COVID-19: Changes to the Nature of Work and Implications for Mental Health. Co-Moderator (with M. Bujaki). «The Public Accounting Profession and COVID-19: Changes to the Nature of Work and Implications for Mental Health», Sprott Shifting Landscapes - Accounting Roundtable, Ottawa (virtual), October 16.

2015: Association for Nonprofit and Social Economy Research (ANSER-ARES), Ottawa, Canada-Ontario. «D3: Collective Entrepreneurship and Cooperatives», University of Ottawa, June 3-5.

2014: Association for Nonprofit and Social Economy Research (ANSER-ARES), St-Catherines, Canada-Ontario. «A2: Social Enterprises», May 28-30.

2014: Carleton University, Ottawa, Canada-Ontario. Facilitator for dialogue session. «Funding Cultural and Social Enterprises», Power of the Arts National Forum / Forum national Le pouvoir des arts - Acting Now for Social Change, Fondation Michaelle Jean Foundation / Carleton University Faculty of Arts and Social Science, Ottawa, November 7-9.

2013: Power of the Arts National Forum, Ottawa, Canada-Ontario. Facilitator for panel and workshop sessions. «Social Enterprises and Economic Development », Fondation Michaelle Jean Foundation / Carleton University Faculty of Arts and Social Science, September 28-29.

Academic Conference: Panelist

2017: International Society for Humor Studies Conference, Montreal, Canada-Quebec. «Table ronde présentée par l'APIH - Réseaux sociaux: utilisation et impact», July 10-14.

2016: Research in Management: National Capital Forum, Ottawa, Canada-Ontario. Bonaccio, S., Brouard, F., Da Graca, T.B., Freel, M, Lee, I. «Panel: How to improve business schools research impact in the NCR», Research in Management: National Capital Forum, Telfer School of Management / Sprott School of Business / Université du Québec en Outaouais, Ottawa (University of Ottawa), May 3.

2014: Sprott-Telfer Forum, Ottawa, Canada-Ontario. Brouard, F., Neilson, L. «Small Charities: An Analysis of Change in Fundraising Activities»,

2014 Telfer / Sprott Research Forum - Sharing Knowledge along the Canal, University of Ottawa, April 24.

2013: Association for Nonprofit and Social Economy Research (ANSER-ARES), Victoria, Canada-British Columbia. «Social Enterprise: Are Walls or Bridges Being Built Between Research and Practice», June 5-7.

Board Member: Advisory Board

2018 – 2022: Social Enterprise Journal.

Board Member: PRJ Editorial Review Board

2020 – 2022: ECHO de l'OH (infolettre de l'Observatoire de l'humour).

2016 – 2022: La Revue COSSI (Communication, Organisation, Société du Savoir et Information).

2014 – 2022: Journal of Small Business & Entrepreneurship.

2010 – 2022: Journal of Social Entrepreneurship.

2010 – 2019: Financial Management Institute Journal. Published by the Financial Management Institute of Canada / Institut de la gestion financière du Canada (FMI/IGF)

2010 – 2017: Revue internationale PME. Published by the Association Internationale de recherche en entrepreneuriat et PME (AIREPME)

2010 – 2017: Journal of Legal Tax Research. Published by the American Taxation Association, a section of the American Accounting Association

2010 – 2017: Small Business Institute Journal. Published by the Small Business Institute and the Small Business Advancement National Center - University of Central Arkansas

Board of Directors: Substantial Involvement

2010 – 2015: Association for Nonprofit and Social Economy Research (ANSER-ARES). Member, Board of Directors (ex-officio as ANSERJ journal co-editor)

2010 – 2014: Association Internationale de recherche en entrepreneuriat et PME (AIREPME). Member of the Board of Directors (Canada - outside of Québec representative)

Chair: Committee / Task Force

2010 – 2015: Association for Nonprofit and Social Economy Research (ANSER-ARES). Co-Chair, ANSERJ Journal Management Committee

Chair: Conference / Track / Program

2021: Association for Nonprofit and Social Economic Research (ANSER).

2017: Association for Nonprofit and Social Economy Research (ANSER-ARES), Toronto, Canada-Ontario. Chair. «D3: Using T3010 Registered Charity Information Return Data for Research», May 31-June 1.

2014: Sprott Centre for Social Enterprises, Ottawa, Canada-Ontario. Organizer and chair of the session. How XBRL is Revolutionizing the Reporting of Financial and Non-Financial Information (Meetings with Canada Revenue Agency officials after the research seminar for T3010 application), Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), September 15.

2013: Association for Nonprofit and Social Economy Research (ANSER-ARES), Victoria, Canada-British Columbia. Chair. «B2: Nonprofits and the Social Economy @the Edge», Chair. «F4: Theoretical Perspectives», Victoria, June 5-7.

2012: Association for Nonprofit and Social Economy Research (ANSER-ARES), Waterloo, Canada-Ontario.

- Chair. «D3: Co-operatives in 2012, the Year of the Co-operative»
- Chair. «I1: Measuring Social Impacts», May 30 - June 1.

Keynote Address

2014: Sommet économique rural de l'Ontario / Rural Economic Summit of Ontario, Rockland, Canada-Ontario. Le Groupe Convex: Une entreprise sociale, Banquet 10e anniversaire, May 1. (Invited guest speaker)

2014: Conseil de la coopération de l'Ontario, Ottawa, Canada-Ontario. «Revisiter les obstacles perçus dans l'entrepreneuriat social», Congrès 2014, September 25

Member: Committee/Task Force

2010 – 2019: Institut de recherche sur les PME (INRPME).

2018: CAAA / CPA Canada Education research grant sub-committee.

2017: International Society for Humor Studies (ISHS) Conference, Tallinn, Estonia. Member of the 2017 Awards Committee.

2015 – 2017: International Society for Humor Studies (ISHS) Conference, Montréal, Canada-Quebec. Member of the Organizing Committee and Scientific Committee, July 10-14.

2016: Canadian Council for Small Business and Entrepreneurship, Quebec City, Canada-Quebec. Member of the Scientific Committee, 11-13

2015: Association francophone pour le savoir (ACFAS), Rimouski, Canada-Quebec. Member of the Scientific Committee, 8e colloque Participation

des citoyens - Pourquoi ne votent-ils plus? Réflexion autour de l'absentéisme électoral et la participation citoyenne, ACFAS 2015, 28 mai 2015, Université du Québec à Rimouski (UQAR).

2015: Colloque spécialisé Communication, Organisation, Société du Savoir et Information, Montpellier, France. Member of the International Scientific Committee, 15-17 juin 2016, Université Paul-Valéry de Montpellier, Montpellier.

2014 – 2015: Canadian Academic Accounting Association Annual Conference, Toronto, Canada-Ontario. Member of the Scientific Committee

2014 – 2015: Colloque spécialisé Communication, Organisation, Société du Savoir et Information, Montréal, Canada-Quebec. Member of the International Scientific Committee, 10-12 juin 2015, Université de Montréal.

2014: Académie de l'Entrepreneuriat et de l'Innovation, Fribourg, Switzerland. 2nd Research Day in Social Entrepreneurship, 30-31 January 2014

2014: Association francophone pour le savoir (ACFAS), Montréal, Canada-Quebec. Member of the Scientific Committee, 7e colloque Participation des citoyens - La participation contre la démocratie, 30 ans plus tard. Retour sur la pensée de Jacques T. Godbout, 15 mai, Concordia University

2014: Colloque spécialisé Communication, Organisation, Société du Savoir et Information, Poitiers, France. Member of the International Scientific Committee, Information, communication, documentation: les nouvelles utopies, juin 2014, Université de Poitiers.

2014: Congrès de l'Académie de l'Entrepreneuriat et de l'Innovation, Nantes, France. Member of the International Scientific Committee, Entrepreneuriat responsable : pratiques et enjeux thématiques, 20-22 mai 2015, Audencia Nantes, Ecole Centrale Nantes, Ecole des Mines de Nantes, Université de Nantes.

2012: Colloque spécialisé Communication, Organisation, Société du Savoir et Information, Poitiers, France. Member of the International Scientific Committee, Information et organisations : nouvelles stratégies, structures et fonctions, juin, Université de Poitiers.

2012: Canadian Academic Accounting Association Annual Conference, Charlottetown, Canada-Prince Edward Island. Member of the Scientific Committee, Prince Edward Island University

2012: Journées Georges Doriot sur l'entrepreneuriat familial, Montreal, Canada-Quebec. Member of the Scientific Committee, 11-13 mai

2012: ESG Management School, Paris, France. Member of the Scientific Committee, 1ère Journée de l'entrepreneuriat social, September 10, 2012, Paris

2012: Canadian Academic Accounting Association Annual Conference, Montreal, Canada-Quebec. Member of the Scientific Committee

2012: Colloque spécialisé Communication, Organisation, Société du Savoir et Information, Shippagan, Canada-New Brunswick. Member of the International Scientific Committee, 5e colloque spécialisé Communication, Organisation, Société du Savoir et Information (COSSI 2013) - Information et organisations : nouvelles stratégies, structures et fonctions, 19-21 juin 2013, Université de Moncton

2012: Association francophone pour le savoir (ACFAS), Quebec City, Canada-Quebec. Member of the Scientific Committee, 6e colloque Participation des citoyens, mai, Université Laval

2010 – 2012: Canadian Academic Accounting Association. Member, CAAA/CMA Funding Panel

2010 – 2012: Ordre des comptables agréés du Québec (OCAQ). Member, Committee for commercial products and services

2010: Colloque spécialisé Communication, Organisation, Société du Savoir et Information, Shippagan, Canada-New Brunswick. Member of the International Scientific Committee, Information et organisations : nouvelles stratégies, structures et fonctions, 8-9 juin, Université de Moncton.

Other Professional Service Activities

2023: Independent Review Committee on Standard Setting in Canada.

2021: Association des professionnels de l'industrie de l'humour (. Les Olivier. Association des professionnels de l'industrie de l'humour (APIH). Membre d'un jury d'un prix Olivier 2022.

2019: Canadian Academic Accounting Association. Canadian Academic Accounting Association (CAAA) / Association canadienne des professeurs de comptabilité (ACPC) CPA Canada / CAAA Education research grant subcommittee (\$10,000 maximum per year to allocate) (member of the sub-committee)

2017: Association des professionnels de l'industrie de l'humour. Les Olivier. Association des professionnels de l'industrie de l'humour (APIH). Membre d'un jury d'un prix Olivier 2017.

2017: Canadian Academic Accounting Association. External Reviewer, CAAA Education research grant subcommittee (\$10,000 maximum per year to allocate) (chair of the sub-committee)

2017: Employment and Social Development Canada. External Reviewer, Social Policy Directorate on Statistics Canada feasibility study: Addressing statistical data gaps in the measurement of social enterprises

2017: International Society for Humor Studies Conference, Montreal, Canada-Quebec. «Bilingual interactive workshop on the research needs in Humor Studies», July 10-14. (Organizer)

2014 – 2017: T3010 Users Research Group. Leader and Organizer. T3010 Users Research Group. Virtual meetings (2-3 times a year)

2016: Canada Tri-agency Programs Secretariat. External Reviewer, Canada Tri-agency Programs Secretariat, Tier 1 Canada Research Chair (1 nomination)

2016: Congrès International Francophone sur la PME, Trois-Rivières, Canada-Quebec. With Janssen, F., Ferland, H., Hébert, N., Lessard, R. «Table ronde: Entreprises sociales : expériences et modèles d'affaires», 13e Congrès International Francophone sur la PME (CIFPME 2016), Association

Internationale de recherche en entrepreneuriat et PME (AIREPME), Trois-Rivières, October 26-28. (Organizer)

2015: MITACS. External Reviewer for application (1 application)

2014: T3010 Users Research Group. Organizer. T3010 Users Research Day, in partnership with Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES), T3010 Users Research Group, Institute for Nonprofit Studies and Ajah, May 26.

2014: Association for Nonprofit and Social Economy Research (ANSER-ARES), St. Catharines, Canada-Ontario. Brouard, F., McMurtry, J.J., Elson, P., Lionais, D., Vieta, M. «Roundtable: ICSEM Project - Canadian Perspective», May 28-30. (Organizer)

2014: Association for Nonprofit and Social Economy Research (ANSER-ARES), St. Catharines, Canada-Ontario. Brouard, F., Philips, S., Raggo, P., Jackson, E.T. «Roundtable: Teaching Needs in Graduate Education regarding Philanthropy and NonProfits», May 28-30. (Organizer)

2014: Association for Nonprofit and Social Economy Research (ANSER-ARES), St. Catharines, Canada-Ontario. Brouard, F., Polovina-Vukovic, D., Hebb, T., Raggo, P., Elson, P. (2014). «Panel: Teaching Experiences in Philanthropy and NonProfits», May 28-30. (Organizer)

2010 – 2012: Canadian Academic Accounting Association. External Reviewer, research grant CMA funding program (\$10,000 maximum per year to allocate) (8-10 applications per year)

2010: Association for Nonprofit and Social Economy Research (ANSER-ARES), Montreal, Canada-Quebec. With Elson, P., Carter, S., Quarter, J. «Round table on new and relaunched journals in Canada Canadian Journal of Nonprofit and Social Economy Research / Revue canadienne de recherche sur les OSBL et l'économie sociale (ANSERJ) and The Philanthropist», June 2-4. (Coorganizer with P. Elson)

Reviewer - External Tenure

2021: Collège militaire royal du Canada. Collège militaire royal du Canada (CMR). Rapport d'évaluation des activités de recherche d'un professeur

2019: HEC Montréal. Full professor in entrepreneurship application.

2018: University of Sterling, Stirling, Scotland.

2017: University of Manitoba. Associate professor in entrepreneurship application

2011: HEC Montreal. Full professor in accounting application / Dossier pour professeur titulaire en sciences comptables.

Reviewer: Ad Hoc Reviewer for a Journal

2021 – 2022: Accounting Perspectives.

2020: Journal of Business Ethics.

2010 – 2017: Journal of Legal Tax Research.

2016: Entrepreneurship and Regional Development.

2015 – 2016: Journal of Small Business and Entrepreneurship.

2015 – 2016: Journal of Business Ethics.

2010 – 2016: Small Business Institute Journal.

2010 – 2016: Revue internationale PME.

2010 – 2016: Journal of Social Entrepreneurship.

2010 – 2016: Canadian Journal of Nonprofit and Social Economy Research.

2010 – 2015: Management international.

2014: Social Enterprise Journal.

2014: Lien Social et Politiques.

2012: Revue internationale de cas en gestion.

2011: Revue canadienne des sciences de l'information et de bibliothéconomie.

2011: Public Administration.

2010: Policy & Society.

Reviewer: Book / Textbook

2017: Routledge, Taylor & Francis Group. Reviewer for Routledge / Taylor & Francis Group of a social innovation monograph proposal

2014: Understanding Social Entrepreneurship by Kickul & Lyons. Reviewer for Routledge / Taylor and Francis group of the Social Entrepreneurship book for the 2nd edition.

2014: Canadian Income Taxation: Planning and Decision Making by Buckwold & Kitunen. McGraw-Hill Ryerson of the Taxation book for 2015-2016 edition

2012: Canadian Income Taxation: Planning and Decision Making by Buckwold & Kitunen. Reviewer for McGraw-Hill Ryerson of the Taxation book for the 2013-2014 edition.

2011: Accounting for Managers by Collier. Reviewer for John Wiley & Sons Canada of the Accounting book for the Canadian edition

2011: Canadian Income Taxation: Planning and Decision Making by Buckwold & Kitunen. Reviewer for McGraw-Hill Ryerson of the Taxation book

for the 2012-2013 edition.

Reviewer: Conference Paper

2010 – 2016: Congres International Francophone en Entrepreneuriat et PME.

2010 – 2015: Canadian Academic Accounting Association Annual Conference.

2012: Colloque International bilingue "Entrepreneuriat et développement durable", Ile Maurice, Mauritius.

Scholarly Work in Progress

Papers Under Review

Bujaki, M., Durocher, S., Brouard, F., & Neilson, L. (2019). "Conflicting accounts of inclusiveness in accounting firm recruitment website photographs," Revised and resubmitted to *European Accounting Review*.

Description: (previously submitted to Accounting, Auditing & Accountability Journal (A) «Depictions of Diversity in Canadian Accounting Firm Recruitment Documents» in March 2015; comments received and offer by editor to revise and resubmit - round 1); resubmitted in June 2016; comments received and offer by editor to revise and resubmit - round 2; resubmitted in May 2018; rejected in October 2018)

Aray, Y. & Brouard, F. (2018). "Mission Changes of Hybrid Organizations: Drift, Dilution, Evolution or Something Else?," Initial submission.

Description: Social Innovation and Change Initiative (SICI), Harvard Kennedy School, Cambridge (US), April 6-7, 2018.

Isabelle, D., Brouard, F., Lu, I., & Heslop, L. A. (2018). "An Integrative Framework for Studying Students' Attitudes toward Entrepreneurship," Initial submission to *Entrepreneurship, Theory and Practice*.

Brouard, F. & Di Vito, J. (2017). "Étude des mécanismes de gouvernance applicables aux PME," Revised and resubmitted to *Revue Internationale PME*.

Description: Comments received after submission, under review for resubmission

Brouard, F. & Forget-Delph, L. (2017). "Charity's Tax Clinic: Lessons Learned from an Extra Curriculum Activity," Initial submission to *Journal of Accounting Education*.

Description: Comments received after submission, under review for resubmission elsewhere.

Brouard, F., Hebb, T., & Madill, J. (2017). "Proposed Typology for Social Enterprises: Financial self-sufficiency, Innovation and Social transformation Dimensions," 1st revise and resubmit to *Journal of Social Entrepreneurship*.

Description: Comments received after submission, under review for resubmission elsewhere

Paré, C. & Brouard, F. (2017). "L'entrepreneuriat culturel dans l'industrie du spectacle d'humour : coproduction et coopération chez les humoristes et auteurs humoristiques québécois," Revision under 2nd review to *Revue de l'entrepreneuriat*.

Description: Issue "Entrepreneuriat culturel et créatif : réalités et enjeux",

Aray, Y. & Brouard, F. (2017). "Similarities and differences in business model components of social entrepreneurial organizations," Initial submission to *Social Enterprise Journal*.

Description: August 2017.

Working Papers

Webb, A., Cloutier, A., & Brouard, F. (2023). "Social Innovations in Professional Sports: FC Barcelona's Barça Museum."

Pilon, M. & Brouard, F. (2022). "Managing accountability information strategies: Discourse in a health care sector."

Brouard, F., Lemieux, B., & Bujaki, M. (2022). "Tax Literacy: Review and a Proposed Conceptual Framework."

Neal, A., Bujaki, M., Brouard, F., & Durocher, S. (2022). "Shifting Logics, Selecting Audiences: Constructions of Identity in Canadian Professional Accounting Associations' Magazine Covers," targeted for Accounting Auditing and Accountability Journal.

Levasseur, K. & Brouard, F. (2020). "Issues and challenges from using T3010 data from Canadian registered charities."

Description: Voluntas, submitted in September 2020

Brouard, F. (2020). "Conceptualising Accountability through Relationships, Governance and Information."

Description: Public Administration Review, submitted in December 2020. (previously submitted to Voluntas, submitted in August 2020; comments received).

Webb, A., Cloutier, A., & Brouard, F. (2020). "Social Innovations Associated with Professional Sport: The Case of FC Barcelona's Barça Museum," targeted for Journal of Business Ethics.

Description: Cloutier, Submitted 2020-08-01.

Isabelle, D., Brouard, F., Lu, I., & Heslop, L. A. (2019). "An Integrative Framework for Studying Students' Attitudes toward Entrepreneurship."

Lu, I., Kwan, E., Heslop, L. A., Brouard, F., & Isabelle, D. (2019). "An examination of youth entrepreneurial motivation based on self-determination theory and latent profile analysis."

Brouard, F., Cleland, E., Miller, K., & Gershoig, E. (2017). "Social Enterprises Ecosystem Mapping in Eastern Ontario Region."

Description: In progress

Brouard, F. & Paré, C. (2017). "Women in the Québec Francophone Comedy Industry: Case Studies of Ladies in the."

Description: In progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI6000	Seminar in Accounting I	0.17	3	Main	34%
2023/Summer	ACCT5123	Advanced Taxation	0.5	18	Main	100%
2023/Summer	ACCT5123	Advanced Taxation	0.5	18	Main	100%
2023/Summer	ACCT5123	Advanced Taxation	0.5	26	Main	100%
2023/Winter	BUSI6001	Seminar in Accounting II	0.14	1	Main	34%
2023/Winter	BUSI5081	Seminar in Accounting II	0.05	1	Main	34%
2022/Summer	ACCT5123	Advanced Taxation	0.5	17	Main	100%
2022/Summer	ACCT5123	Advanced Taxation	0.5	22	Main	100%
2022/Summer	ACCT5123	Advanced Taxation	0.5	28	Main	100%
2022/Winter	BUSI6000	Seminar in Accounting I	0.09	2	Main	18%
2020/Summer	ACCT5123	Advanced Taxation	0.5	15	Main	100%
2020/Summer	ACCT5123	Advanced Taxation	0.5	30	Main	100%
2020/Summer	ACCT5123	Advanced Taxation	0.5	28	Main	100%
2020/Winter	BUSI6000	Seminar in Accounting I	0.1	1	Main	20%
2020/Winter	BUSI5080	Seminar in Accounting I	0.02	0	Main	5%
2019/Fall	ACCT5120	Advanced Concepts	0.1	9	Main	20%
2019/Summer	ACCT5123	Advanced Taxation	0.5	16	Main	100%
2019/Summer	ACCT5123	Advanced Taxation	0.5	28	Main	100%
2019/Summer	ACCT5123	Advanced Taxation	0.5	29	Main	100%
2019/Winter	BUSI6001	Seminar in Accounting II	0.13	1	Main	25%
2018/Fall	ACCT5120	Advanced Concepts	0.09	3	Main	17%
2018/Summer	ACCT5120	Advanced Concepts	0.13	6	Main	25%
2018/Summer	ACCT5120	Advanced Concepts	0.13	7	Main	25%
2018/Summer	ACCT5123	Advanced Taxation	0.5	23	Main	100%
2018/Summer	ACCT5123	Advanced Taxation	0.5	10	Main	100%
2018/Summer	ACCT5123	Advanced Taxation	0.5	28	Main	100%
2018/Winter	ACCT5122	Issues in Taxation	0.25	2	Main	100%
2017/Fall	BUSI6000	Seminar in Accounting I	0.09	1	Main	
2017/Fall	ACCT5120	Advanced Concepts	0.5	15	Main	17%
2017/Summer	ACCT5123	Advanced Taxation	0.5	21	Main	100%
2017/Summer	ACCT5120	Advanced Concepts	0.16	7	Main	33%
2017/Summer	ACCT5120	Advanced Concepts	0.16	7	Main	33%
2017/Summer	ACCT5120	Advanced Concepts	0.16	7	Main	33%
2017/Summer	ACCT5123	Advanced Taxation	0.5	22	Main	100%
2017/Summer	ACCT5120	Advanced Concepts	0.16	7	Main	33%
2017/Summer	ACCT5123	Advanced Taxation	0.5	9	Main	100%

2017/Summer	ACCT5122	Issues in Taxation	0.25	8	Main	100%
2016/Fall	ACCT5120	Advanced Concepts	0.5	9	Main	25%
2016/Summer	ACCT5123	Advanced Taxation	0.5	33	Main	100%
2016/Summer	ACCT5120	Advanced Concepts	0.5	34	Main	33%
2016/Summer	ACCT5123	Advanced Taxation	0.5	8	Main	100%
2016/Summer	BUSI6001	Seminar in Accounting II	0.5	3	Main	33%
2016/Summer	BUSI5906	Special Topics	0.25	3	Main	100%
2015/Fall	BUSI6000	Seminar in Accounting I	0.08	3	Main	16%
2015/Fall	BUSI5906	Special Topics	0.25	1	Main	100%
2015/Fall	BUSI3005	Taxation I	0.5	49	Main	100%
2015/Fall	BUSI3005	Taxation I	0.5	22	Main	100%
2015/Fall	ACCT5120	Advanced Concepts	0.08	9	Main	16%
2015/Summer	ACCT5120	Advanced Concepts	0.5	32	Main	16%
2015/Summer	BUSI5906	Special Topics	0.25	4	Main	100%
2015/Summer	ACCT5123	Advanced Taxation	0.5	32	Main	100%

Service to the institution (Academic)

External Committees

Thesis Assignments

PhD. Thesis Committees:

2012-2013: External, Mélanie Claude

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: Faculty Board Exec.

2024-2025: Faculty Board - Sprott

2023-2024: CTPC Tenure and Promotion Committee - Departmental (Cluster II)

2022-2023: Faculty Board - Sprott

2019-2020: Tenure and Promotion Committee - Departmental (Cluster II)

2017-2018: Tenure and Promotion Committee - Departmental (Cluster II)

H. OTHER

Student Experience Activities

2013 - «Entrepreneurship Career Panel», Sprott Business Career Management Centre Presentation

2015 - Coach, Sprott Competes : 2016 ANPA - Alberta Not-for-Profit Association Competition.

Other Activities

2015 - Lettre de recommandation pour Benoit Caron, CPA, CA pour le titre de Fellow comptable professionnel agréé (FCPA).

2014 - Lettre de recommandation pour Benoit Caron, CPA, CA pour le Prix CPA Émérite 2014 - région de l'Outaouais

2012 - Lettre de recommandation pour Hélène Racine, CPA, CA pour le titre de Fellow comptable professionnel agréé (FCPA)

Student Experience Activities

2017 - Member of the Jury, Sprott -Telfer -UQO 2017 "Two Cities, Curious Minds: Graduate Research at Three Universities - National Capital Region Thesis

Competition and Poster Session"

Selected Media Appearances: Online

2020 - Retour dans les salles de spectacles: la prudence est de mise

2020 - Le secteur culturel aux soins intensifs, Le Devoir

2022 - To clean up Hockey Canada, financial transparency is a must, The Conversation

2022 - Canadian Charity Law: Very interesting research note from the Sprott School of Business dealing with Hockey Canada and transparency

Credentials

Professional Memberships

Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), 2012-

Chartered Professional Accountants Canada, 2012-

Chartered Professional Accountants Ontario (CPA Ontario), 2012-

Association for Nonprofit and Social Economy Research (ANSER) / Association de recherche sur les organismes sans but lucratif et l'économie sociale (ARES), 2009-

Institute of Chartered Accountants of Ontario (ICAO), 2002-2012

Association Internationale de recherche en entrepreneuriat et PME (AIREPME), 2002-

Strategic and Competitive Intelligence Professionals (SCIP), 1998-2015

Association francophone pour le savoir (ACFAS), 1993-

American Accounting Association (AAA), 1988-

Canadian Academic Accounting Association / Association canadienne des professeurs de comptabilité (CAAA/ACPC), 1987-

Canadian Institute of Chartered Accountants / Institut canadien des comptables agréés (CICA/ICCA), 1984 - 2012

Ordre des comptables agréés du Québec, 1984 - 2012

Association de planification fiscale et financière (APFF), 1984-

Canadian Tax Foundation / Association canadienne d'études fiscales (CTF/ACEF), 1984-

Executive or Professional Education

2014 - Instructor. Training Session, CA exam preparation.. Réseau Synergie.ca (LMT (Gatineau) & DFK (Québec) (annual) [Activity: Delivery of Professional Education]

2014 - Instructor. CPA PREP Module 8 Taxation. Chartered Professional Accountants (CPA) Canada. [Activity: Delivery of Professional Education]

2013 - Instructor. Training Session, CA exam preparation. Réseau Synergie.ca (LMT (Gatineau) & DFK (Québec) (annual) [Activity: Delivery of Professional Education]

2012 - Instructor. Training Session, CA exam preparation. Réseau Synergie.ca (LMT (Gatineau) & DFK (Québec) (annual) [Activity: Delivery of Professional Education]

2011 - Instructor. Training Session, CA exam preparation. Réseau Synergie.ca (LMT (Gatineau) & DFK (Québec) (annual) [Activity: Delivery of Professional Education]

2010 - Instructor. Training Session, CA exam preparation. Réseau Synergie.ca (LMT (Gatineau) & DFK (Québec) (annual) [Activity: Delivery of Professional Education]

Paid Service Experience

2015: University of Waterloo Centre for Accounting Ethics, Presentation at 2nd Biennial Symposium on Accounting Ethics - Accounting Professionalism in Toronto.

Research Reports

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Saskatchewan Roughrider Foundation., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs - Case studies and comparison., submitted to Philab Research Report.

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Comparative analysis., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – BC Lions Alumni Association Foundation., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Whitecaps Foundation., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Canucks for Kids Fund and Vancouver Canucks Alumni Foundation., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Pilon, M., & Webb, A., Hockey in Canadian Provinces & Territories – Membership statistics from Hockey Canada., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Calgary Flames Foundation., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – True North Youth Foundation., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Jays Care Foundation (Toronto)., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – MLSE Foundation (Toronto)., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Pilon, M., & Webb, A., Hockey in Canada – Existing and proposed organizational structure., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Edmonton Oilers Community Foundation., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Pilon, M., & Webb, A., Hockey in Canadian Provinces & Territories – Governance and Finances of Hockey Canada members., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Fondation Impact de Montréal., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Canada Soccer – Financial Information: Issues about transparency and equity for women., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Work Integration Social Enterprises (WISE): Workshop Synthesis 2023., submitted to SCSE-CSES Research Report.

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Overview., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – OSEG Foundation (Ottawa)., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Senators Community Foundation., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Fondation du Club de Hockey Canadien pour l'enfance., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Litalien, M., & Perreault, L., Canadian Foundations Associated with Professional Sports Clubs – Fondation des Alouettes., submitted to Professional Accounting Research Group (PARG).

2023: Brouard, F., Pilon, M., & Webb, A., Hockey Canada Governance - Existing Situation and Suggestions by Judge Cromwell., submitted to Professional Accounting Research Group (PARG).

2022: Brouard, F., Tableaux pour un portrait de l'industrie de l'humour., submitted to Groupe de recherche sur l'industrie de l'humour.

2022: Brouard, F., Définition des variables de la base de données en humour du GRIH., submitted to Groupe de recherche sur l'industrie de l'humour.

2022: Brouard, F., Consultation - Commentaires au Comité d'examen indépendant de la normalisation au Canada., submitted to Sprott School of Business.

2022: Cascante, I., Al-Saidawi, H., McDonough, L., Adams, A., Brouard, F., Litalien, M. Collaboration, Cooperation Co-creation - Case studies of social service innovations during COVID-19., submitted to United Way Greater Toronto.

2022: Brouard, F., Pilon, M., & Webb, A., Hockey Canada - Financial Information: issues about transparency and responsiveness., submitted to Professional Accounting Research Group (PARG), Sprott School of Business.

2022: Brouard, F., Webb, A., & Pilon, M., Registered Canadian Amateur Athletic Association (RCAAA) - List of RCAAA and issues on financial information., submitted to Professional Accounting Research Group (PARG), Sprott School of Business.

2022: Brouard, F., Sale of Ottawa Senators - Information on a future transaction., submitted to Professional Accounting Research Group (PARG), Sprott School of Business.

2021: Duhamel, M., Cadieux, L., & Brouard, F., Impacts économiques du repreneuriat: Estimations du spectre de fermeture et de la menace fantôme des intentions de transferts de PME au Québec et au Canada, 2007-2017., submitted to Centre de transfert d'entreprises du Québec.

2021: Brouard, F., CPA Competency Map 2.0: Reflection and comments from an academic., submitted to Professional Accounting Research Group (PARG), Sprott School of Business, Carleton University.

2021: Cadieux, L., Samson, A., & Brouard, F., Série de guides sur le transfert de PME (experts au contenu des guides du cédant., submitted to Centre de transfert d'entreprises du Québec.

2021: Brouard, F., & Litalien, M., Commentaires au Ministère des Finances Canada - Consultation sur les organismes de bienfaisance: Stimuler les dépenses de bienfaisance dans nos communautés., submitted to Ministère des Finances Canada.

2021: Adams, G., Brouard, F., Litalien, M., & Gievski-Sidorovska, I., The Role of Grantmaking Foundations in Restructuring Ontario's Philanthropic Action: Throughout and Beyond the COVID-19 Crisis., submitted to Philab Ontario.

2020: Brouard, F., & Paré, C., Industrie de l'humour et l'après-COVID: Incertitudes et nouvelles normalités., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2020: Pilon, M., & Brouard, F., Typology and List of Organisations within Ontario's Health Care System., submitted to Professional Accounting Research Group (PARG), Sprott School of Business, Carleton University.

2020: Pilon, M., & Brouard, F., Description and Observations of the Transition from LHINs to Ontario Health Agency., submitted to Professional Accounting Research Group (PARG), Sprott School of Business, Carleton University.

2020: Brouard, F., CPA Common Final Exam and the COVID-19: Need for action in a period of uncertainties., submitted to Professional Accounting Research Group (PARG), Sprott School of Business, Carleton University.

2020: Brouard, F., & Paré, C., Industrie de l'humour et l'après-COVID: Gestion de crise., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2020: Brouard, F., & Paré, C., Industrie de l'humour et l'après-COVID: Contexte pour l'industrie de l'humour et les arts de la scène., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2020: Brouard, F., & Paré, C., Industrie de l'humour et l'après-COVID: Estimations du nombre de places dans les salles de spectacles., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2020: Brouard, F., Duhamel, M., & Cadieux, L., Survol des recommandations fiscales antérieures sur la transmission de PME., submitted to Professional Accounting Research Group (PARG), Sprott School of Business, Carleton University.

2020: Brouard, F., Pouliot, J., & Paré, C., Industrie de l'humour et l'après-COVID: Enjeux pour l'industrie., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2020: Laurin, F., & Brouard, F., Industrie de l'humour et l'après-COVID: Impacts économiques pour le secteur des arts et spectacles., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2020: Brouard, F., Paré, C., & Pouliot, J., Industrie de l'humour et l'après-COVID: Priorités pour l'industrie de l'humour., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2020: Brouard, F., Pilon, M., & Paré, C., Industrie de l'humour et l'après-COVID: Diminution des revenus, augmentation des coûts et rentabilité., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2020: Brouard, F., Industrie de l'humour et l'après-COVID / Comedy industry and post-covid: Caucus de l'industrie de l'humour TRIR / Comedy industry caucus CSRR., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2020: Duhamel, M., Brouard, F., & Cadieux, L., L'influence des facteurs fiscaux sur les intentions de transferts de PME québécoises et canadiennes., submitted to Institut de recherche sur les PME, Université du Québec à Trois-Rivières.

2020: Brouard, F., Lenczner, M., & Patzelt, A., Report on 2020 T3010 Research Group ACCS/CSDWG Consultation., submitted to SCSE-CSES Discussion Paper, Sprott Centre for Social Enterprises / Centre Sprott pour les entreprises sociales (SCSE-CSES).

2020: Brouard, F., Industrie de l'humour et l'après-COVID: Mesures gouvernementales pour le secteur des arts et de la culture., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2020: Pilon, M., & Brouard, F., Description and Observations of the Transition to a Model of Ontario Health Teams., submitted to Professional Accounting Research Group (PARG), Sprott School of Business, Carleton University.

2020: Brouard, F., & Paré, C., Industrie de l'humour et l'après-COVID: Six mois d'expériences après le début de la pandémie., submitted to Groupe de recherche sur l'industrie de l'humour (GRIH), Sprott School of Business, Carleton University.

2018: Paré, C., & Brouard, F., Enquête sur le portrait sociodémographique et l'égalité homme-femme chez les créatrices et créateurs d'humour au Québec - Sommaire 2018-1: Données sociodémographiques., submitted to Sprott Centre for Social Enterprises.

2018: Paré, C., & Brouard, F., Enquête sur le portrait sociodémographique et l'égalité homme-femme chez les créatrices et créateurs d'humour au Québec - Sommaire 2018-2: Données sur la perception de l'égalité entre les femmes et les hommes., submitted to Sprott Centre for Social Enterprises.

2017: Brouard, F., & Paré, C., Présence des humoristes québécois francophones dans les médias sociaux., submitted to Sprott Centre for Social Enterprises.

2015: Brouard, F., & Paré, C., Profil et écosystème de l'industrie de l'humour francophone au Québec., submitted to Sprott Centre for Social Enterprises.

2015: Brouard, F., SCSE/CSES Resource Models Report - Summary Report., submitted to Sprott Centre for Social Enterprises.

2015: Sault, J., & Brouard, F., Habitat for Humanity NCR Resource Models Report - Summary Report., submitted to Sprott Centre for Social Enterprises.

2015: Brouard, F., Humoristes dans le palmarès (Top 25) des spectacles payants en arts de la scène les plus fréquentés au Québec 2008-2015., submitted to Sprott Centre for Social Enterprises.

2014: Brouard, F., McMurtry, J.J., & Viela, M., ICSEM Project - Social Enterprises Models in Canada - Ontario., submitted to Sprott Centre for Social Enterprises.

2012: Neilson, L., Brouard, F., & Armenakyan, A., Fundraising Methods: Past, Present, Future., submitted to Institute for Nonprofit Studies, Mount Royal University.

2012: Larivet, S., & Brouard, F., Les dirigeants de PME et l'intelligence stratégique: éléments attitudinaux., submitted to Cahier de recherche ESCE.

2012: Armenakian, A., Neilson, L., & Brouard, F., Fundraising Methods: Past, Present, Future., submitted to Sprott Centre for Social Enterprises.

2012: Brouard, F., Neilson, L., & Armenakyan, A., Small Charities: An Analysis of Change in Fundraising Activities., submitted to Institute for Nonprofit Studies, Mount Royal University.

2010: Philips, S., Stoney, C., Hilton, R., Maslove, A., Brouard, F., Adams, E., Krawchenko, T., Bellefontaine, T. The Gasoline Tax and Infrastructure Funding: An Examination of Governance Structures and Spending Patterns., submitted to Centre for Urban and Research and Education (CURE).

Service to the Community

Member of a Committee

2016 – 2022: Société Santé en français, Governance Committee

2015 – 2022: Hôpital Montfort Hospital, 2018 - 2020 - Chairperson, Management Committee / Comité de gestion

2018 - - Member, Projects in development Committee / Comité de développement de projet

2018 - 2020 - Treasurer / Trésorier

2017 - Member, Board of trustee / Conseil d'administration Santé Montfort

2017 - Member, Board of trustee / Conseil d'administration Hôpital Montfort

2017 - Member, Executive Committee / Comité exécutif

2017 - Member, Audit Committee / Comité d'audit

2017 - Chair, Governance Committee / Comité de gouvernance

2015 - 2017 - Member, Management Committee / Comité de gestion

2012 - Member, Governance Committee / Comité de gouvernance

2011 - - Elected member (2011, 2015), Association de l'Hôpital Montfort

2014 – 2022: Canadian Philanthropy Partnership Research Network

2017: Santé Montfort

Other Community Service Activities

2014 – 2022: Volunteer (Stage Crew / Équipe de plateau), Centre des arts Shenkman Arts Centre

2018: Les Olivier. Association des professionnels de l'industrie de l'humour (APIH). Membre d'un jury d'un prix Olivier 2018.

2017: Les Olivier. Association des professionnels de l'industrie de l'humour (APIH). Membre d'un jury d'un prix Olivier 2017.

2010 – 2013: Judge Ontario, You Innovate Canada Competition, Canadian Association of Family Enterprises (CAFE)

Curriculum Vitae - Sprott School of Business

Merridee Bujaki, PhD
Full Professor - Tenured, 2012
Sprott School of Business (Accounting)
Telephone: 613-520-2600 x2774
Email: merridee.bujaki@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
Orcid: <https://orcid.org/0000-0002-6674-1042>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Queen's University.
Master of Business Administration. Queen's University.
Bachelor of Arts. Queen's University.

Professional Certifications

Certificate in Blended and Online Teaching, Education Development Centre, Carleton University, 2016
Fellow of the Chartered Professional Accountants (FCPA), 2016, Toronto, Ontario.
Chartered Professional Accountant (CPA), 1990, Toronto, Ontario.
Chartered Professional Accountants of Ontario, 1990, Toronto, Ontario.

B. EMPLOYMENT

Academic Appointments

Co-Director of Centre for Research on Inclusion at Work, Carleton University (January, 2019 - Present), Ottawa, Canada-Ontario.
Full Professor, Accounting, Sprott School of Business, Carleton University (2017 - Present), Ottawa, Canada-Ontario.
Instructor, Management Development Program for Women / Management Certificate for Women, Centre for Research and Education on Women and Work (CREWW), Sprott School of Business, Carleton University, Ottawa (1999 - Present), Ottawa, Canada-Ontario.
Director, Centre for Research & Education on Women and Work, Carleton University (2013 - 2018), Ottawa, Canada-Ontario.
Associate Professor, Accounting, Sprott School of Business, Carleton University (2012 - 2017), Ottawa, Canada-Ontario.
Section Coordinator, AFI Section, Telfer School of Management, University of Ottawa (2011 - 2012), Ottawa, Canada-Ontario.
Cross-appointment to School of Information Studies, Faculty of Arts, University of Ottawa (2008 - 2012), Ottawa, Canada-Ontario.
Associate Professor, Telfer School of Management, University of Ottawa (2000 - 2012), Ottawa, Canada.
Manager, Accounting Studies, Telfer School of Management, University of Ottawa (2005 - 2010), Ottawa, Canada-Ontario.
Section Coordinator, AFI Section, Telfer School of Management, University of Ottawa (2005 - 2010), Ottawa, Canada-Ontario.
Adjunct Professor, School of Business, Queen's University (2005 - 2006), Kingston, Canada.
Adjunct Professor, School of Business, Queen's University (1999 - 2003), Kingston, Canada.
Manager, Accounting Studies, Faculty of Administration, University of Ottawa (1999 - 2001), Ottawa, Canada-Ontario.
Assistant Professor of Accounting, Faculty of Administration, University of Ottawa (1995 - 2000), Ottawa, Canada-Ontario.
Adjunct Professor, School of Business, Queen's University (1995), Kingston, Canada-Ontario.

Other Employment

Developed and delivered accounting modules for Leadership for Growing Businesses in the Construction/Property Management Sector, Executive Education, Telfer School of Management (2012), Ottawa, Canada-Ontario.
Developed and delivered advanced financial analysis course for Industry Canada (multiple deliveries), Executive Education, Telfer School of Management (2010 - 2012), Ottawa, Canada-Ontario.
Consultant, Native Women's Association of Canada (2010 - 2012), NA, Canada.
Developed and delivered accounting course for Canadian Blood Services, Executive Education, Telfer School of Management (2011), Ottawa, Canada-Ontario.
Chartered Accountant, Price Waterhouse, Auditing Department (1988 - 1991), NA, Canada.

C. PROFESSIONAL HONOURS

2019: Faculty Research Award, Sprott School of Business, Carleton University.

2018: Carol-Ann Tetrault-Sirsly Research Award, Sprott School of Business, Carleton University.

2016: Certificate of Recognition for a Review of Outstanding Quality, Canadian Journal of Administrative Sciences.

2016: Fellow, Chartered Professional Accountants of Ontario. Awarded designation Fellow, Chartered Professional Accountants of Ontario (FCPA). Fellowship is the highest designation awarded by CPA Ontario in recognition of outstanding career achievements as well as outstanding service to the community and the profession. .

2015: Best Paper Award, Administrative Sciences Association of Canada. Accounting Division "Productivity in Top-Ten Academic Accounting Journals by Researchers at Canadian Universities in the 21st Century"..

2007 – 2010: Welch LLP Accounting Fellow, Telfer School of Management, University of Ottawa.

2004: Best Paper Award, Administrative Sciences Association of Canada. Accounting Division "Early Adoption of Section 3465 by Canadian Companies: The Importance of Compliance Costs, Managing Perceptions, and Corporate Governance"..

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		11	1	12
Articles-in-Progress (All)	1	24		25
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings		2		2
Paper Presentations (Refereed)	1	16		17
Research Report, Non-Refereed		3		3
Grants - Funded (both refereed and non-refereed)		17		17
Other Research, Non-refereed		2		2
Totals	2	75	1	78

Refereed Scholarly Publications

Articles in Refereed Journals

Bujaki, M., Mansurov, A., & McConomy, B. (2024). The Content and Evolution of COVID-19 Disclosures in Canadian Financial Statements and MD&A Documents. *Canadian Journal of Administrative Sciences*. [B]

Neal, A., Bujaki, M., Durocher, S., & Brouard, F. (2023). Identity performances on professional accounting association magazine covers. *Accounting Auditing and Accountability Journal*, 37 (3), 893-920. [A+]

Ben Amar, W., Bujaki, M., McConomy, B., & McIlkenny, P. (2022). Disclosure Transparency, Impression Management or Both? A textual analysis of board gender diversity disclosures in Canada. *Corporate Social Responsibility and Environmental Management*, 29 (5), 1247-1265. [C]

Bujaki, M., Lento, C., Butt, I., Anderson, N., & Ogima, C. (2022). A Systematic Literature Review of Indigenous Peoples and Accounting Research: Critical Indigenous Theory as a Step toward Relationship and Reconciliation. *Accounting Forum*. [B]

Bujaki, M., & McConomy, B. (2022). Internal controls, labour processes and work at the Isthmus Lockstation, Rideau Canal, 1832–1854: Discipline and governmentality at a distance. *Accounting History*, 1-28. [A]

Ben Amar, W., Bujaki, M., McConomy, B., & McIlkenny, P. (2021). Gendering Merit: Challenging the discourse of merit in corporate disclosures related to women on boards. *Critical Perspectives on Accounting*, 75, 1-23. [A]

2021: Published

2020: In Press, Corrected Proof (advanced online pub with DOI)

James, Y., Bourgeault, I., Gaudet, S., & Bujaki, M. (2021). Care Work and Academic Motherhood: Challenges for Research and Tenure in the Canadian University. *Canadian Journal of Higher Education*, 51 (4), 85-99.

Gaudet, S., Marchand, I., Bujaki, M., & Bourgeault, I. L. (2021). Women and gender equity in academia through the conceptual lens of care. *Journal of Gender Studies*, 31 (1), 74-86. [A,Other]

Bujaki, M., Durocher, S., Brouard, F., & Neilson, L. (2021). Conflicting accounts of inclusiveness in accounting firm recruitment website photographs. *European Accounting Review*, 30 (3), 473-501. [A+]

Published online: 14 Jul 2020 (online advance pub)

Lento, C., Butt, I., Bujaki, M., Anderson, N., & Ogima, C. (2021). A Canadian Perspective on Indigenous Peoples and Accounting Research: Using a Systematic Literature Review to Promote Inquiry and Inclusion. *Accounting Perspectives*, 20 (4), 771-806. [B]

Bujaki, M., & Brouard, F. (2021). Students Reflections on Assurance and Taxation during COVID-19: A Commentary. *Accounting Perspectives*, 20 (3), 327-355. [B]

Bujaki, M., & Durocher, S. (2020). Managing legitimacy following loss of human life: Loblaw and Rana Plaza. *Sustainability Accounting, Management and Policy*, 11 (6), 1023-1053. [B]

Article publication date: 2 December 2019 Issue publication date: 23 October 2020

Bujaki, M., Lento, C., & Sayed, N. (2019). Utilizing professional accounting concepts to understand and respond to academic dishonesty in accounting programs. *Journal of Accounting Education*, 47, 28-47. [B]

Bujaki, M. L., Durocher, S., Brouard, F., Neilson, L., & Pyper, R. (2018). Protect, profit, profess, promote: Establishing legitimacy through logics of 'diversity' in Canadian accounting firm recruitment documents. *Canadian Journal of Administrative Sciences*, 35 (1), 162-178. [B]

Published online: 20 April 2016 (Online Version of Record published before inclusion in an issue)

Lento, C., Bujaki, M., & Yeung, W.H. (2018). Auditing estimates in financial statements: a case study of a fish farm's biological asset. *Accounting Perspectives*, 17 (3), 435-462. [B]

Lento, C., Sayed, N., & Bujaki, M. (2018). Sex role socialization and perceptions of student academic dishonesty by male and female accounting faculty. *Accounting Education*, 1-26. [A]

Published online.

Bujaki, M., Gaudet, S., & Juliano, R. M. (2017). Governmentality and identity construction through 50 years of personal income tax returns: The case of an immigrant couple in Canada. *Critical Perspectives on Accounting*, 46, 54-74. [A]

Bujaki, M., & Mcconomy, B. J. (2017). Productivity in Top-Ten Academic Accounting Journals by Researchers at Canadian Universities in the 21st Century. *Accounting Perspectives*, 16 (4), 269-313. [B]

Brouard, F., Bujaki, M., & Durocher, S. (2017). Attracting Prospective Professional Accountants before and after the CPA Merger in Canada. *Accounting Perspectives*, 16 (2), 105-127. [B]

Brouard, F., Bujaki, M. L., Durocher, S., & Neilson, L. (2017). Professional Accountants' Identity Formation: An Integrative Framework. *Journal of Business Ethics*, 142 (2), 225-238. [A,FT50]

Online April 2016

Durocher, S., Bujaki, M., & Brouard, F. (2016). Attracting Millennials: Legitimacy management and bottom-up socialization processes within accounting firms. *Critical Perspectives on Accounting*, 39, 1-24. [A]

Bujaki, M. L., & McConomy, B. (2015). Responding to Accountability Predicaments: Impression Management in Voluntary Corporate Annual Report Disclosures. *Review of Accounting and Finance*, 20 (2), 1-26. [B]

Bujaki, M. L. (2015). Visualizing the Rideau Canal through early budget estimates, 1823-1824. *Accounting History*, 20 (1), 43-62. [A]

Bujaki, M. L. (2014). Parallel Challenges Building the New York and Rideau Canals. *International Journal for the History of Engineering and Technology*, 84 (1), 30-51.

Bujaki, M., & Durocher, S. (2014). Financial ratios and strategy in the Canadian telecommunications sector. *International Journal of Case Method Research and Application*, 26 (2), 89-99.

Bujaki, M., & Durocher, S. (2014). Depreciation in the Canadian Airline Industry. *Accounting Perspectives*, 13 (3), 209-218. [B]

Case in refereed journal.

Bujaki, M. L., & McConomy, B. J. (2012). Metaphor in Nortel's Letters to Shareholders: 1997 – 2006. *Accounting Auditing and Accountability Journal*, 25 (7), 1113-1139. [A+]

Bujaki, M., & Durocher, S. (2012). Industry identification through ratio analysis. *Accounting Perspectives*, 11 (4), 315-322. [B]

Bujaki, M. L., & McConomy, B. J. (2010). The Portrayal of Women in Canadian Corporate Annual Reports. *Canadian Journal of Administrative Sciences*, 27 (3), 210-223. [B]

September

Bujaki, M. L., & McConomy, B. J. (2010). Gendered Interactions in Corporate Annual Report Photographs. *Gender in Management: An International Journal*, 25 (2), 119-136. [C]

Bujaki, M. L. (2010). Cost-Benefit Analysis in Correspondence Related to Building the Rideau Canal. *Accounting History*, 15 (2), 229-251. [A]

Articles in Refereed Conference Proceedings

Full Paper

Bujaki, M., Durocher, S., Brouard, F., Neilson, L., & Pyper, R. (2015). The Diversity of 'Diversity' in Canadian Accounting Firm Recruitment Websites. *Canadian Academic Accounting Association Annual Conference*, 1 (2).

May 29, 2015. Toronto, ON. Vol. 1, No. 2. Available online through Social Science Research Network

Chapters in Edited Books

Bujaki, M., & Pereira de Castro Casa Nova, S. (2024). Anxiety, acceptance, and advocacy: Academic career reflections from two female full professors from two continents. Under Review, In University of Ottawa Press (Ed.), *Seasons in the Academy*. [Status: Under Review]

Bujaki, M. (2022). The Academic Sabbatical as a Voyage of Discovery – What Really Counts. In Handford Victoria, Sibbald, Timothy M (Ed.), *The Academic Sabbatical: A Voyage of Discovery* (pp. 185-204). Ottawa: University of Ottawa Press. [Status: Published]

Gaudet, S., Marchand, I., Bourgeault, I., & Bujaki, M. (2020). Care, vulnérabilité et université: Enjeux de la carrière professorale au féminin. In

Bourgault, S., Cloutier, S., and Gaudet, S. (Eds.), *Éthiques de l'hospitalité, du don et du care: Actualité, regards croisés* (pp. 203-228). University of Ottawa Press. [Status: Published]

Bujaki, M., Lennox-Terrion, J., Mavriplis, C., & Moreau-Johnson, F. (2012). Group Mentoring for mid-career women Associate Professors. In Clutterbuck, D., Poulsen, K.M., and Kochan, F. (Eds.), *Developing Successful Diversity Mentoring Programs: An International Casebook* (pp. 76-82). Berkshire, England: Open University Press. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Scholarly Publications

2016: Bujaki, M., *Review of Feminine Capital: Unlocking the Power of Women Entrepreneurs*. Feminine Capital: Unlocking the Power of Women Entrepreneurs, Barbara Orser and Catherine Elliott, Stanford, California: Stanford Business Books, Stanford University Press, 2015. 228 pp. International Journal of Entrepreneurship and Small Business , Vol. 28, No. 4, 519-520.

Other Publications

Newspaper Articles or Columns

2011: Bujaki, M., & McConomy, B., *Corporate disclosures: why companies choose to disclose, or not, forward-looking information in their corporate annual reports*. CA Magazine, 40-43

2010: Bujaki, M., & McConomy, B., *Voluntary Disclosures in Corporate Annual Reports - More than First Meets the Eye*. CMA Management, 14-16

Other Publications

2023: Bujaki, M., MacLean, S.E., Redmond, M., Sabra, S., & Ysseldyk, S.E.K. *Faculty Writing Supports: Assessing the Impact of Research Supports during the and Recommendations for the Future*.

2014: Bujaki, M., & Schweitzer, L., *How Should the Issue of Inadequate Gender Balance and Diversity on Boards Be Addressed?* In C.Gardiner and S. Cotsman, *Perspectives on Board Diversity*, (pp. 7-10), Ottawa, Canada: The Conference Board of Canada.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Associate Editor

2022 – 2024: Accounting Perspectives (International).

2021 – 2022: Accounting Perspectives (International).

2020 – 2021: Accounting Perspectives (International).

2019 – 2020: Accounting Perspectives (International).

2018 – 2019: Accounting Perspectives (International).

2017 – 2018: Accounting Perspectives (International).

2016 – 2017: Accounting Perspectives (International).

2016: Accounting Perspectives (International).

Editor: Guest Editor of Journal

2024: Accounting Perspectives (International). Guest Editor, *Accounting Perspectives*, Special Issue, “Sharing Accounting Research on Equity, Diversity, Indigeneity, Inclusion and Belonging”

Presentations

Papers Presented at Conferences

Refereed

Bujaki, M.L., Maclean, S., Redmond, M., Smith, S.E.K., & Ysseldyk, R. (2024). *COVID-19, Care, and Critical Collegiality: An Examination of Two Faculty Writing Support Initiatives*. Gender, Work & Organization Conference, Sydney, Canada-Nova Scotia.

Bujaki, M. & Pereira De Castro Casa Nova, S. (2024). *“Embracing messiness – Movements in the careers of dissident bodies”*. Gender, Work & Organization Conference, Sydney, Canada-Nova Scotia.

Bujaki, M.L. & Pereira De Castro Casa Nova, P. (2024). *“Raging and Esperançando: an utopian feminized academia in business: Takes from North and South”*. Gender, Work & Organization Conference, Virtual, Virtual.

Description: “Escrevo como quem manda cartas de amor” [I write like someone who sends love letters]: Love and care in Accounting Academia”, presented at Gender, Work and Organization 14th International Interdisciplinary Conference, Sydney, Nova Scotia, June 20 2024.

Pereira De Castro Casa Nova, S. & Bujaki, M.L. (2024). *“Escrevo como quem manda cartas de amor” [I write like someone who sends love letters]: Love and care in Accounting Academia”*. Gender, Work & Organization Conference, Sydney, Canada-Nova Scotia.

Description: 14th International Interdisciplinary Conference

- Bujaki, M., Mcconomy, B., Morrison, L., & Jayendran, A. (2024). *"Counter Accounts in Accountability Relationships: A Multimodal Critical Discourse Analysis of Rio Tinto's Destruction of the Juukan Gorge"*. Canadian Academic Association Annual Conference, Halifax, Canada-Nova Scotia.
- Mansurov, A. & Bujaki, M. (2024). *Students' Perceptions of Diversity, Equity and Inclusion in an Accounting Firm's Recruitment Photos*. Canadian Academic Accounting Association Annual Conference, Halifax, Canada-Nova Scotia.
- Gaudet, S., Bourgeault, I., & Bujaki, M.L. (2024). *"Les enjeux académiques genrés et l'internationalisation" [Gendered academic challenges and internationalization]*. ACFAS annual conference, Ottawa, Canada-Ontario.
- Bujaki, M., Himick, D., & Paquette, S. (2023). *"(Giving Up) On Striving to be an 'Ideal Worker' in a 'Greedy Institution': Accountants' Observations on Mental Health"*. European Accounting Association, Virtual, Virtual.
- Bujaki, M., Butt, I., Lento, C., Meredith, P., & Wick, S. (2023). *How has the COVID-19 pandemic impacted the accounting profession? Insights from a Systematic Literature Review based around CPA Canada's Foresight Initiative*. Canadian Academic Accounting Association Annual Conference, Quebec City, Canada-Quebec.
- Bujaki, M., Mansurov, A., & Mcconomy, B. (2023). *The content and evolution of COVID-19 disclosures in Canadian financial statements and MD&A documents*. Canadian Academic Accounting Association Annual Conference, Quebec City, Canada-Quebec.
- Bujaki, M., Himick, D., & Paquette, S. (2023). *"(Giving Up) On Striving to be an 'Ideal Worker' in a 'Greedy Institution': Accountants' Observations on Mental Health"*. Canadian Academic Accounting Association Annual Conference, Quebec City, Canada-Quebec.
- Bujaki, M., Maclean, S.E., Redmond, M., Sabra, M., & Smith, S.E.K. (2023). *Faculty Writing Supports: Assessing the Impact of Research Supports during the and Recommendations for the Future*. Carleton University, Ottawa, Canada-Ontario.
- Bujaki, M., Mansurov, A., & Mcconomy, B. (2022). *The Content and Evolution of COVID-19 Disclosures in Canadian Financial Statements and MD&A Documents*. Lazaridis School of Business and Economic, Waterloo, Canada-Ontario.
- Mansurov, A. & Bujaki, M. (2022). *Investor Reaction in Investment Discussion Board Forums to Impression Management in Earnings Press Releases of TSX Venture Exchange Firms*. Canadian Academic Accounting Association Annual Conference, Saskatoon, Canada-Saskatchewan.
- Bujaki, M., Himick, D., & Paquette, S. (2022). *Striving to be an 'Ideal Worker' in a 'Greedy Institution': An Investigation of Public Accountants' Mental Health*. Hautes Edutes Commerciale, Montreal, Canada-Quebec.
- Bujaki, M., Mcconomy, B., & Morrison, L. (2021). *An Historical Perspective on Water and the Environment: Insights ad Implications from Environmental Philosophy and the Construction of the Erie and Rideau Canals*. Accounting History Symposium, Virtual, Virtual.
- Description: presented at the 16th Accounting History Symposium, Accounting History Special Interest Group of the Accounting and Finance Association of Australia and New Zealand, 3 December 2021.
- Bujaki, M. & Mcconomy, B. (2020). *Discipline and Governmentality at a Distance: Internal Controls at the Isthmus Lockstation, Rideau Canal, 1832-1854*. Canadian Academic Accounting Association Conference, Saskatoon, Canada-Saskatchewan.
- Neal, J.A., Bujaki, M., Brouard, F., & Durocher, S. (2020). *Constructing the Identity of Canada's Merged Accounting Profession through Pre- and Post-Merger National Accounting Magazine Cover Images*. Qualitative Accounting Research Symposium, Guelph, Canada-Ontario.
- Description: University of Guelph, November 27 2020
- Bujaki, M., Mcconomy, B., & Morrison, L. (2020, October). *An Historical Perspective on Water and the Environment during the Construction of the Erie and Rideau Canals: Insights and Implications form Environmental Philosophy*. Professional Accounting Research Group Speakers' Series, Sprott School of Business, Ottawa, Canada-Ontario.
- Neal, J.A., Bujaki, M., Brouard, F., & Durocher, S. (2020, June). *Constructing the Identity of Canada's Merged Accounting Profession through Pre- and Post-Merger National Accounting Magazine Cover Images*. Canadian Academic Accounting Association, Saskatoon, Canada-Saskatchewan.
- Ben Amar, W., Bujaki, M., Mcconomy, B., & Mcilkenney, P. (2019). *Gendering Merit: Challenging the discourse of merit in corporate disclosures related to women on boards*. Alternative Accounts, Kingston, Canada-Ontario.
- Description: May 10, 2019
- Bujaki, M. & Mcconomy, B. (2019). *Discipline and governmentality at a distance: Internal controls at the Isthmus Lockstation, Rideau Canal, 1832 – 1854*. Accounting History International Conference, Paris, France.
- Description: September 5, 2019
- Bujaki, M., Neilson, L., Durocher, A., & Brouard, F. (2019). *A content and semiotic analysis of the inclusiveness of Canadian accounting firm recruitment website photographs*. Alternative Accounts, Kingston, Canada-Ontario.
- Description: May 11, 2019.
- Bujaki, M. (2019). *What is Accounting History – 'Subject' vs 'Method'?* Qualitative Accounting Research Symposium, Guelph, Canada-Ontario.
- Description: University of Guelph, Guelph, Ontario, November 29, 2019
- Bujaki, M. & Mcconomy, B. (2018). *Internal control activities during the early operation of the Rideau Canal at the Isthmus Lock Station 1832-1854*. World Canals Conference, Athlone, Ireland (Northern).
- Description: September 10, 2018
- Ben-Amar, W., Mcilkenney, P., Bujaki, M., & Mcconomy, B. (2018). *Gendering Merit – Challenging the discourse of merit in corporate disclosures related to women on boards*. Canadian Academic Accounting Association Conference, Calgary, Canada-Alberta.
- Description: June 16, 2018.

- Ben-Amar, W., McIlkenny, P., Bujaki, M., & Mcconomy, B. (2018). *One small step for women; No giant leap for humankind – A textual analysis of board gender diversity disclosures in Canada*. Canadian Academic Accounting Association Conference, Calgary, Canada-Alberta.
Description: June 16, 2018.
- Bujaki, M. & Durocher, S. (2017). *Analyzing Loblaw's response to the Rana Plaza building collapse using an integrated framework for social reporting in response to negative events*. Critical Perspectives on Accounting Conference, Quebec City, Canada-Quebec.
Description: July 3, 2017, Quebec City, Quebec, Canada
- Bujaki, M., Gaudet, S., & Iuliano, R. (2017). *Governmentality and identity Construction through 50 years of personal income tax returns: The case of an immigrant couple in Canada*. Critical Perspectives on Accounting Conference, Quebec City, Canada-Quebec.
Description: Tuesday July 4, 2017, Quebec City, Quebec, Canada
- Mansurov, A. & Bujaki, M. (2017). *Industry classification case – Dynamic Approach*. Canadian Academic Accounting Association Annual Conference, Montreal, Canada-Quebec.
Description: Accounting Perspectives Roundtable, June 1, 2017.
- Perreault, L. & Bujaki, M. (2017). *Opinicon*. Canadian Academic Accounting Association Annual Conference, Montreal, Canada-Quebec.
Description: Accounting Perspectives Roundtable, June 1, 2017.
- Bourgeault, I., Bujaki, M., Gaudet, S., & James, Y. (2016). *Healthy Academic Women at Work? The Implications of Health and Care for Careers over the Life-Course*. Work and Family Researchers Network Conference, D.C., Washington.
- Bujaki, M., Neilson, L., Durocher, S., & Brouard, F. (2016). *Photographic Depictions of Gender and Ethnic Diversity in Canadian Accounting Firm Recruitment Documents*. Tunisian Accounting and Finance Professors Association of North America, Monastir, Tunisia.
Description: Summer Accounting and Finance Conference, July 17 2016
- Brouard, F., Bujaki, M., & Durocher, S. (2016). *Attracting Potential Professional Accountants before and after the CPA Merger in Canada*. Canadian Academic Accounting Association Annual Conference, St. John's, Canada-Newfoundland.
Description: June 2 (2016 Accounting Perspectives special event).
- Brouard, F. F., Bujaki, M., & Durocher, S. (2016). *Recruitment of Prospective Professional Accountants before and after CPA Merger in Canada*. Canadian Academic Accounting Association Annual Conference, St. John's, Canada-Newfoundland.
Description: June 2, 2016
- Bujaki, M., Lento, C., & Sayed, N. (2016). *Perceptions of Student Academic Dishonest by Male and Female Accounting Faculty: Incidents and Responses*. Canadian Academic Accounting Association Annual Conference, St. John's, Canada-Newfoundland.
Description: June 4, 2016
- Bujaki, M. & Mcconomy, B.J. (2016). *Productivity in Top-Ten Academic Accounting Journals by Researchers at Canadian Universities in the 21st Century*. Canadian Academic Accounting Association Annual Conference, St. John's, Canada-Newfoundland.
Description: June 3, 2016
- Bujaki, M. & Durocher, S. (2016). *Loblaw Companies Limited: Responding to the Accountability Predicament Arising from the Rana Plaza Building Collapse*. Alternative Accounts Conference, Ottawa, Canada-Ontario.
Description: April 29, 2016
- Durocher, S., Bujaki, M., & Brouard, F. (2015). *Managing legitimacy to attract Millennial employees*. European Accounting Association Annual Congress, Glasgow, Scotland.
Description: 38th conference from April 28-30.
- Brouard, F., Bujaki, M., Durocher, S., & Neilson, L. (2015). *A theoretical framework of professional accountant identity formation and directions for future research*. Biennial Symposium on Accounting Ethics - Accounting Professionalism, Toronto, Canada-Ontario.
Description: Also listed as: "Identity, Image and Stereotypes: Exploring Exchange Dynamics involving the Accounting Profession and Directions for Future Research", University of Waterloo, Toronto, April 16-18. Presented by Dr. Brouard.
- Brouard, F., Bujaki, M., Durocher, S., & Neilson, L. (2015). *A theoretical framework of professional accountant identity formation and directions for future research*. Telfer Annual Regional Conference on Accounting and Finance, Ottawa, Canada-Ontario.
Description: May 15
- Bujaki, M., Neilson, L., Durocher, S., & Brouard, F. (2015). *Photographic Depictions of Gender and Ethnic Diversity in Canadian Accounting Firm Recruitment Documents*. American Accounting Association (AAA) Annual Meeting, Chicago, Illinois.
Description: August 2015
- Bujaki, M. & Mcconomy, B. (2015). *Productivity in Top-Ten Academic Accounting Journals by Researchers at Canadian Universities in the 21st Century*. Administrative Sciences Association of Canada (ASAC), Halifax, Canada-Nova Scotia.
Description: June 14 2015
- Bujaki, M., Neilson, L., Durocher, S., & Brouard, F. (2015). *The Diversity of 'Diversity' in Canadian Accounting Firm Recruitment Websites*. Alternative Accounts, Ottawa, Canada-Ontario.
Description: April 16-18
- Bujaki, M., Durocher, S., Brouard, F., & Neilson, L. (2015). *Diversity of 'Diversity' in Canadian Accounting Firm Recruitment Websites*. Canadian Academic Accounting Association Annual Conference, Toronto, Canada-Ontario.

Description: May 28-31

Brouard, F., Bujaki, M., Durocher, S., & Neilson, L. (2015). *Identity, Image and Stereotypes: Exploring Exchange Dynamics involving the Accounting Profession and Directions for Future Research*. Telfer Annual Regional Conference on Accounting and Finance, Ottawa, Canada-Ontario.

Description: May 15 2015

Brouard, F., Bujaki, M., Durocher, S., & Neilson, L. (2015). *Identity, Image and Stereotypes: Exploring Exchange Dynamics involving the Accounting Profession and Directions for Future Research*. Biennial Symposium on Accounting Ethics - Accounting Professionalism, Toronto, Canada-Ontario.

Description: Centre of Accounting Ethics - University of Waterloo, Toronto, April 17 2015.

Bujaki, M., Gaudet, S., & Iuliano, R. (2015). *Personal Income Tax Returns as Narrative: The Case of a Refugee Couple in Canada*. Alternative Accounts Conference, Ottawa, Canada-Ontario.

Description: April 17 2015

Bujaki, M., Brouard, F., Durocher, S., Neilson, L., & Pyper, R. (2014). *Depictions of Diversity in Canadian Accounting Firm Recruitment Documents: Gender and Race in Photos and Text*. International Conference on Diversity in Organizations, Communities, and Nations, Vienna, Austria.

Description: July 9-11

Bujaki, M. & Durocher, S. (2013). *Financial ratios and strategy in the Canadian telecommunications sector*. World Association for Case Method Research & Application, Berlin, Germany.

Bujaki, M. & McConomy, B. (2012). *Pictures, Numbers and Words - The 2004-2008 Annual Reports of Loblaw Companies Limited*. Irish Accounting & Finance Association Conference, Galway, Ireland (Northern).

Bujaki, M. (2011). *What Lieutenant-Colonel John By Should Have Known in Preparation for the Construction of the Rideau Canal*. Accounting History Review Conference, Cardiff, United Kingdom.

Non-Refereed

Bujaki, M. (2016). *Analyzing cost overruns: The case of the Rideau Canal, 1826 – 1832*. World Canals Conference, Inverness, Scotland.

Bourgeault, I., Bujaki, M., Gaudet, S., & James, Y. (2016). *Women's Academic Careers and Health: A Preliminary Life Course Analysis*. Canadian Sociological Association Conference, Calgary, Canada-Alberta.

Description: June 1, 2016

Bujaki, M. & Durocher, S. (2016). *Resilience in social reporting of negative events: the case of Loblaw and the Rana Plaza building collapse*. Invited presentation at Ontario Universities Accounting and Finance Symposium, Toronto, Canada-Ontario.

Description: October 6 2016

Other Presentations

Invited Lecture

2018: Telfer MBA Conference, Ottawa, Canada-Ontario. Bujaki, M.L. 2018, "Gendering Merit – Challenging the discourse of merit in corporate disclosures related to women on boards" Telfer MBA Conference, March 10, 2018. (Invited presentation).

2018: CREWW Research Forum, Ottawa, Canada-Ontario. Bujaki, M.L., Bourgeault, I., and Gaudet, S. 2018 "Academia as a Bourdieusian field: Masculine structures and their consequences for women", October 30, 2018.

2018: Université Laval, Quebec, Canada-Quebec. Ben Amar, W., Bujaki, M.L., McConomy, B., McIlkenny, P. 2018 "Gendering Merit: Challenging the discourse of merit in corporate disclosures related to women on boards", November 23, 2018.

Keynote Address

2018: Queen's University, Belfast, Ireland (Northern). Bujaki, M.L., Lento, C., Sayed, N. 2018, "Utilizing professional accounting concepts to understand and respond to academic dishonesty in accounting programs", September 21, 2018.

2016: Tunisian Accounting and Finance Professors Association of North America, Monastir, Tunisia. "Accounting, Identity and Research", Keynote Address presented at the Tunisian Accounting and Finance Professors Association of North America, Summer Accounting and Finance Conference, July 18 2016.

Presentation

2024: Accounting & Race Forum. Speaker, "Personal Journey & Commitment to DEIB/EDIIB", Accounting & Race Forum, December 6, 2024

2024: Early Career Committee, Ottawa, Canada-Ontario. Speaker, "Writing Strategies", Sprott Early Career Committee, November 25, 2024

2024: Queen's University, Kingston, Canada-Ontario.

1. **Bujaki, M.L.**, McConomy, B., Morrison, L., and Jayendran, A. 2024.

"Counter Accounts in Accountability Relationships: A Multimodal Critical Discourse Analysis of Rio Tinto's Destruction of the Juukan Gorge", presented at Queen's University, Kingston, Ontario, May 10, 2024.

2024: University of Ottawa, Ottawa, Canada-Ontario. **Bujaki, M.L.**, Himick, D., and Paquette, S. 2024.

2023: GGFL. Accountants' Mental Health in Canada: Some Preliminary Findings and Concerns for the Future

2023: Indigenous Works, Virtual, Virtual. Dialogue 2 – Developing a Research Agenda to Increase Indigenous Employment in the Banking and Financial Sector", a presentation in the series 'Virtual Dialogues about Indigenous Employment and Workplace Inclusion Strategies in the Banking and Financial Sector

2021: Healthy Professional Worker Project. Speaker, Healthy Professional Worker Project, "Accountants' Mental Health in Canada: Some Preliminary Findings and Concerns for the Future", Webinar (with Darlene Himick and Suzanne Paquette), November 30, 2021

2020: Strategic Planning Session on Inclusion, Sprott School of Business, Ottawa, Canada-Ontario.

2020: Great Canadian Theatre Company. Presentation to Board of Directors, Great Canadian Theatre Company on addressing implicit bias and fostering diversity on the Board, Ottawa, Ontario, January 27, 2020.

2020: Canadian Academic Accounting Association Annual Conference. Presenter, "Mental Health Workshop – Caring for Yourself and Others",

2019: Professional Accounting Research Group Speakers' Series, Sprott School of Business, Ottawa, Canada-Ontario. Bujaki, M.L. and McConomy, B. 2019 "Discipline and governmentality at a distance: Internal controls at the Isthmus Lockstation, Rideau Canal, 1832 – 1854", presented at the Professional Accounting Research Group Speakers' Series, Sprott School of Business, Ottawa, Ontario, September 23, 2019.

2019: Sprott Research Seminar, Ottawa, Canada-Ontario. Bujaki, M.L. 2019 "Sabbatical reflections (and resistance)", presented at the Sprott Research Seminar, Ottawa, Ontario, October 7, 2019

2017: Lazaridis School of Business and Economics, Waterloo, Canada-Ontario. Bujaki, M.L., McConomy, B., Ben Amar, W., McIlkenny, P. 2017, "Gendering Merit – Challenging the discourse of merit in corporate disclosures related to women on boards", presented at Lazaridis School of Business and Economics, Wilfrid Laurier University, December 15, 2017, Waterloo, Ontario, Canada

2016: Export Development Corporation. Speaker, Export Development Corporation, Women@EDC, "Encouraging Women's Leadership through Mentoring", September 13, 2016

2016: Accounting Speaker Series, Lakehead University, Thunder Bay, Canada-Ontario. "Loblaws Companies Limited: Responding to the Accountability Predicament Arising from the Rana Plaza Building Collapse", presented in the Accounting Speaker Series, Lakehead University, Faculty of Business Administration, Thunder Bay, ON, March 30, 2016.

2016: Séminaire – École de comptabilité, Université Laval, Laval, Canada-Quebec. "Resilience in social reporting of negative events: the case of Loblaws and the Rana Plaza building collapse", presented at Séminaire – École de comptabilité, Université, September 1 2016, Laval, Québec.

2015: London School of Economics, London, United Kingdom. Durocher, S., Bujaki, M., and Brouard, F. 2015, "Managing Legitimacy to attract Millennial employees", presented at the London School of Economics, March 2015.

2014: The Directors College. "Perspectives on Board Diversity", The Directors College, Webinar, September 22

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 3 of 3]: Bujaki, M. Canadian Academic Accounting Association (\$0.00), Principal Investigator, Canadian Academic Accounting Association. [Status: Funded]

2023 [Year 2 of 2]: Bujaki, M. Insight Development Grant (\$27,010.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 2 of 3]: Bujaki, M. Canadian Academic Accounting Association (\$0.00), Principal Investigator, Canadian Academic Accounting Association. [Status: Funded]

2022 [Year 1 of 2]: Bujaki, M. Insight Development Grant (\$27,010.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 1 of 3]: Bujaki, M. Canadian Academic Accounting Association (\$0.00), Principal Investigator, Canadian Academic Accounting Association. [Status: Funded]

2021 [Year 4 of 4]: Bujaki, M. Elevate Aviation Ltd. - MOU, Grantee, Elevate Aviation Ltd.. [Status: Funded]

2021: Bujaki, M. International Research Seed Grant (\$5,000.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2021 [Year 1 of 5]: Nardon, L. Insight Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021: Bujaki, M. Partnership Engage Grant (\$24,049.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021: Bujaki, M. Partnership Engage Grant (\$7,776.00), Principal Investigator, Indigenous Works. [Status: Funded]

2021 [Year 2 of 2]: Nardon, L. & Bujaki, M., Partnership Engage Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council

(SSHRC). co-applicant. [Status: Funded]

2020 [Year 2 of 4]: Bujaki, M. Elevate Aviation Ltd. - MOU, Grantee, Elevate Aviation Ltd.. [Status: Funded]

2020 [Year 3 of 4]: Bujaki, M. Elevate Aviation Ltd. - MOU, Grantee, Elevate Aviation Ltd.. [Status: Funded]

2020: Bujaki, M. Faculty Research Award (\$5,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2020: Bujaki, M. Faculty Research Award (\$5,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2020: Bujaki, M. Healthy and Productive Work - Partnership Grants (\$5,000.00), Principal Investigator, University of Ottawa. [Status: Funded]

2020 [Year 1 of 2]: Nardon, L. & Bujaki, M., Partnership Engage Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). co-applicant. [Status: Funded]

2019 [Year 3 of 3]: Bujaki, M. BMO Financial Group - CREWW (\$33,333.00 of a total grant amount of \$100,000.00), Principal Investigator, BMO Financial Group. [Status: Funded]

2019: Bujaki, M. NAV MOU, Grantee, NAV Canada. [Status: Funded]

2019 [Year 1 of 4]: Bujaki, M. Elevate Aviation Ltd. - MOU, Grantee, Elevate Aviation Ltd.. [Status: Funded]

2018 [Year 2 of 3]: Bujaki, M. BMO Financial Group - CREWW (\$33,333.00 of a total grant amount of \$100,000.00), Principal Investigator, BMO Financial Group. [Status: Funded]

2017 [Year 1 of 3]: Bujaki, M. BMO Financial Group - CREWW (\$33,333.00 of a total grant amount of \$100,000.00), Principal Investigator, BMO Financial Group. [Status: Funded]

2017: Bujaki, M. CURC (\$25,000.00 Not Funded), Principal Investigator, Carleton University, CORIS. [Status: Not Funded]

2013: Bujaki, M. Sprott-Telfer Research Fund (\$5,000.00), Principal Investigator, University of Ottawa. [Status: Funded]

2013: Bujaki, M. Start-up Funds (\$5,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2013: Bujaki, M. Sprott-Telfer Research Fund (\$5,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

Other Professional Activities

Consulting Experience

2022: Women and Gender Equality

2019: Department of Fisheries and Oceans, Canada

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Moderator / Facilitator

2021: Queen Elizabeth Scholars program, Carleton University. Co-Facilitator, Writing Workshop (online), Queen Elizabeth Scholars program, Carleton University (July – September).

2020: Shifting Landscapes Virtual Roundtable, The Public Accounting Profession and COVID-19: Changes to the Nature of Work and Implications for Mental Health. Sprott School of Business, October 16, 2020 (with Francois Brouard)

2019: Canadian Academic Accounting Association. Convenor and Moderator, "Promoting Mental Health in Post-Secondary Education", CAAA Annual Conference, Ottawa, Ontario, May 31, 2019

Academic Conference: Panelist

2024: The One, CPA Canada Annual Conference. “Four Perspectives on Accountants’ Workplace Mental Health: Insights for Leadership and Resilience”,

2021: Canadian Academic Accounting Association Annual Conference. Panelist, Diversity in Practice Panel, Canadian Academic Accounting Association Annual Conference, June 12, 2021 (online).

2021: Canadian Academic Accounting Association Annual Conference. Panelist, Student Mental Wellness, Canadian Academic Accounting Association Annual Conference, June 12, 2021 (online).

2021: Qualitative Research and Critical Accounting conference. Panelist, Becoming a Qualitative/Critical Researcher, Qualitative Research and Critical Accounting conference, November 16 2021 (online)

2015: American Accounting Association (AAA) Annual Meeting. Panelist, Redesigning Accounting Education to Address the Expanding Role of Today's Accountants, organized by CPA Canada, American Accounting Association annual conference, 10 Aug. 2015

Assurance of Learning - Professional Service

2013 – 2014: Chartered Professional Accountants of Canada (CPA Canada). Instructional Materials Development, Assurance, CPA Professional Education Program

Board Member: Advisory Board

2018 – 2019: Elevate Aviation.

Board Member: PRJ Editorial Review Board

2021 – 2024: Critical Perspectives on Accounting.

2018 – 2024: Accounting History.

2014 – 2024: Accounting, Finance and Governance Review.

Board of Directors: Substantial Involvement

2021: Healthy Professional Work Project. Healthy Professional Work Project

2014 – 2017: Canadian Academic Accounting Association. 2016 – 2017 Past-President, 2015 – 2016 President, 2014 – 2015 President-Elect

Chair: Committee / Task Force

2020: Healthy Professional Work Project. Co-chair, Accounting case project

2019: Canadian Academic Accounting Association. Chair, George Baxter Award Committee

Chair: Conference / Track / Program

2021: Healthy Professional Work Project. Co-chair, Accounting case project, Healthy Professional Work Project

Invited Lecture

2018: Telfer MBA Conference, Ottawa, Canada-Ontario. Bujaki, M.L. 2018, "Gendering Merit – Challenging the discourse of merit in corporate disclosures related to women on boards" Telfer MBA Conference, March 10, 2018. (Invited presentation).

2018: CREWW Research Forum, Ottawa, Canada-Ontario. Bujaki, M.L., Bourgeault, I., and Gaudet, S. 2018 "Academia as a Bourdieusian field: Masculine structures and their consequences for women", October 30, 2018.

2018: Université Laval, Quebec, Canada-Quebec. Ben Amar, W., Bujaki, M.L., McConomy, B., McIlkenny, P. 2018 "Gendering Merit: Challenging the discourse of merit in corporate disclosures related to women on boards", November 23, 2018.

Keynote Address

2018: Queen's University, Belfast, Ireland (Northern). Bujaki, M.L., Lento, C., Sayed, N. 2018, "Utilizing professional accounting concepts to understand and respond to academic dishonesty in accounting programs", September 21, 2018.

2016: Tunisian Accounting and Finance Professors Association of North America, Monastir, Tunisia. "Accounting, Identity and Research", Keynote Address presented at the Tunisian Accounting and Finance Professors Association of North America, Summer Accounting and Finance Conference, July 18 2016.

Member: Committee/Task Force

2022: Haim Falk Award Committee.

2020: Healthy Professional Work Project. Executive Committee Member

2019: George Baxter Award Committee.

2019: Status of Women Canada, Ottawa, Canada-Ontario. Advisory Committee member, Status of Women Canada, Empowering Women Leaders in Health

2014 – 2017: Chartered Professional Accountants of Canada (CPA Canada). Member, Women's Leadership Council

2015 – 2016: American Accounting Association. Global Engagement Committee

2014 – 2016: Ontario Pay Equity Commission, Ottawa, Canada-Ontario. Member, Assessment Committee, Ontario Pay Equity Commission, Gender Wage Gap Program

2011 – 2014: Social Sciences and Humanities Research Council (SSHRC). SSHRC Insight Development Grant Committee 3B

Other Professional Service Activities

2024: Advancing Women in Leadership Program, CREWW. Facilitator, Advancing Women in Leadership Program, CREWW

2024: Gender, Work & Organization Conference. Conference Stream Organizer, Gender, Work & Organizations conference, Cape Breton University, June 17 – 20, 2024, Stream: "Fusing theories from the Global South and Global North" (with Silvia Pereira de Castro Casa Nova).

2022: Advancing Women in Leadership Program, CREWW. Facilitator, Advancing Women in Leadership Program, CREWW

2022: External reviewer, Academic Quality Assurance report. External reviewer, Academic Quality Assurance report, Undergraduate Accounting Program

2021: Carleton University. Academic Quality Assurance report, Undergraduate Accounting Progra

2021: Social Sciences and Humanities Research Council (SSHRC). External Reviewer

2019: Professional Accounting Research Group, Sprott School of Business, Ottawa, Canada-Ontario. Convener and Moderator, "Mental Health and the Accounting Profession" event, Professional Accounting Research Group, Sprott School of Business, November 28, 2019

2018: School of Administrative Studies, York University, Toronto, Canada-Ontario. External reviewer for proposed Master' of Science in Management

2018: Social Sciences and Humanities Research Council of Canada. External Reviewer

2016: Social Sciences and Humanities Research Council (SSHRC). External reviewer

2010 – 2014: Institute of Chartered Accountants of Ontario. Case Reviewer, School of Accountancy

2012: Israel Science Foundation. Reviewer

Reviewer - External Tenure

2021: Carleton University.

2019: Carleton University, Ottawa, Canada-Ontario. Two Promotion to Full Professor dossiers

Reviewer: Ad Hoc Reviewer for a Journal

2022 – 2023: Administrative Sciences Association of Canada.

2021 – 2023: Accounting, Auditing & Accountability Journal.

2021 – 2022: Auditing: A Journal of Practice and Theory.

2020 – 2021: Gender in Management: An International Journal.

2020 – 2021: Journal of International Migration Integration.

2020 – 2021: Managerial Auditing Journal.

2018 – 2021: Journal of Business Ethics.

2018 – 2021: Critical Perspectives on Accounting.

2020: Multidisciplinary Business Review.

2020: Financial Accountability & Management.

2020: Accounting Horizons.

2019: Accounting and Business Research.

2018 – 2019: Accounting Perspectives.

2015 – 2017: Canadian Journal of Administrative Sciences.

2015 – 2017: Accounting, Auditing & Accountability Journal.

2015 – 2017: Gender in Management: An International Journal.

2011 – 2014: Accounting Perspectives.

2011 – 2012: Accounting History.

Reviewer: Conference Paper

2022 – 2023: Canadian Academic Accounting Association Annual Conference.

2019: Accounting History International Conference.

2019: Alternative Accounts Conference.

2015 – 2017: Canadian Academic Accounting Association Annual Conference.

2015 – 2017: American Accounting Association (AAA) Annual Meeting.

2014 – 2015: Alternative Accounts Conference.

2014 – 2015: Canadian Academic Accounting Association Annual Conference.

2014 – 2015: American Accounting Association (AAA) Annual Meeting.

2011 – 2014: Canadian Academic Accounting Association Annual Conference.

2010 – 2011: Canadian Academic Accounting Association Annual Conference.

Scholarly Work in Progress

Papers Under Review

Bujaki, M., Bourgeault, I., & Gaudet, S. (2023). "Women's Academic Travel: A Bourdieusian Perspective on Capital Accumulation and Mothers," Revised and resubmitted to *Gender, Work and Organization*.

Mansurov, A. & Bujaki, M. (2023). "Investor Reaction in Investment Discussion Board Forums to Impression Management in Earnings Press Releases of TSX Venture Exchange Firms," Initial submission to *Canadian Journal of Administrative Sciences*.

James, Y., Bourgeault, I., Gaudet, S., & Bujaki, M. (2020). "Care work and academic motherhood: Challenges for research and tenure in the Canadian university," Initial submission to *Canadian Journal of Higher Education*.

Mansurov, A. & Bujaki, M. (2020). "Indicators of Impression Management and Performance in the Earnings Press Releases of Canadian Low

Visibility Firms," Initial submission to *Accounting and Business Research*.

Ben Amar, W., Bujaki, M., McConomy, B., & McIlkenny, P. (2020). "Disclosure Transparency, Impression Management or Both? A textual analysis of board gender diversity disclosures in Canada," Initial submission to *Accounting and Business Research*.

Bujaki, M. & McConomy, B. (2020). "Internal controls, labour processes and work at the Isthmus Lockstation, Rideau Canal, 1832 – 1854: Discipline and governmentality at a distance," 1st revise and resubmit to *Accounting History*.

Ben Amar, W., Bujaki, M., McConomy, B., & McIlkenny, P. (2019). "Gendering Merit: Challenging the discourse of merit in corporate disclosures related to women on boards," 1st revise and resubmit to *Critical Perspectives on Accounting*.

Bujaki, M., Gaudet, S., & Bourgeault, I. (2019). "My path has not been a standard path': Academia as a Bourdieusian field and how assumptions of an unencumbered life disadvantage women," Initial submission to *Gender, Work and Organization*.

Isabelle, D., Bujaki, M., & Rasouli, M. (2019). "Immigrant entrepreneurs in Canada: Role of context and identity," Initial submission to *International Journal of Entrepreneurship and Innovation Management*.

Bujaki, M., Durocher, S., Brouard, F., & Neilson, L. (2019). "Conflicting accounts of inclusiveness in accounting firm recruitment website photographs," Revised and resubmitted to *European Accounting Review*.

Description: (previously submitted to Accounting, Auditing & Accountability Journal (A) «Depictions of Diversity in Canadian Accounting Firm Recruitment Documents» in March 2015; comments received and offer by editor to revise and resubmit - round 1); resubmitted in June 2016; comments received and offer by editor to revise and resubmit - round 2; resubmitted in May 2018; rejected in October 2018)

Bujaki, M., Lento, C., & Sayed, N. (2018). "Utilizing professional accounting concepts to understand and respond to academic dishonesty in accounting programs," Revised and resubmitted to *Journal of Accounting Education*.

Description: November 2018

Bujaki, M. & Durocher, S. (2017). "Analyzing Loblaw's response to the Rana Plaza building collapse using an integrated framework for social reporting in response to negative events.," Revised and resubmitted to *Sustainability Accounting, Management and Policy*.

Description: November 2018

Lento, C., Bujaki, M., & Yeung, W. H. (2017). "Auditing estimates in financial statements: a case study of a fish farm's biological asset.," Initial submission to *Accounting Perspectives*.

Working Papers

Bujaki, M., Isabelle, D., & Rasouli, M. (2023). "Grounding entrepreneurship education for women immigrant entrepreneurs in a Bourdieusian perspective on capital."

Bujaki, M. & Nova, P. C. (2023). "Anxiety, Acceptance and Advocacy: Academic Career Reflections from Two Female Full Professors from Two Continents," targeted for Seasons in the Academy.

Bujaki, M., McConomy, B., & Morrison, L. (2022). "An Historical Perspective on Nature: Insights and Implications from Environmental Philosophy and the Construction of the Erie and Rideau Canals," targeted for Accounting History.

Bujaki, M., Himick, D., & Paquette, S. (2022). "Striving to be an 'Ideal Worker' in a 'Greedy Institution': An Investigation of Public Accountants' Mental Health'."

Brouard, F., Lemieux, B., & Bujaki, M. (2022). "Tax Literacy: Review and a Proposed Conceptual Framework."

Mansurov, A. & Bujaki, M. (2022). "Indicators of Impression Management and Performance in the Earnings Press Releases of Canadian Low Visibility Firms," targeted for Accounting Perspectives.

Mansurov, A. & Bujaki, M. (2022). "Investor Reaction in Investment Discussion Board Forums to Impression Management in Earnings Press Releases of TSX Venture Exchange Firms," targeted for International Journal of Accounting and Finance.

Bujaki, M., Bourgeault, I., & Gaudet, S. (2022). "The Influence of Care Work on Investments in Social and Symbolic Capital: The Role of Travel to Scientific Conferences and Sabbaticals in the Careers of Women Academics," targeted for Gender, Work and Organization.

Neal, A., Bujaki, M., Brouard, F., & Durocher, S. (2022). "Shifting Logics, Selecting Audiences: Constructions of Identity in Canadian Professional Accounting Associations' Magazine Covers," targeted for Accounting Auditing and Accountability Journal.

Bujaki, M. (2020). "The Academic Sabbatical as a Voyage of Discovery – What Really Counts."

Ben Amar, W., Bujaki, M., McConomy, B., & McIlkenny, P. (2019). "One small step for women: No giant leap for humankind – A textual analysis of Board gender diversity disclosures in Canada."

Gaudet, S., Marchand, I., Bourgeault, I., & Bujaki, M. (2019). "Women and care work in Canadian universities: a (im)possible match?."

Bujaki, M. & McConomy, B. (2019). "Discipline and governmentality at a distance: Internal controls at the Isthmus Lockstation, Rideau Canal, 1832 – 1854."

Bujaki, M., Bourgeault, I., & Gaudet, S. (2019). "Governmentality, identity and resistance among women academics."

Bujaki, M. & Isabelle, D. (2019). "Supporting women immigrant entrepreneurs in Canada: A Bourdieusian perspective on capital."

Isabelle, D. & Bujaki, M. (2018). "Reflections and Advice for Immigrant Entrepreneurs: The Perspectives of Male and Female Entrepreneurs.," targeted for Journal of Small Business Management.

Bujaki, M. & Isabelle, D. (2018). "Immigrant Entrepreneurs in Canada: The interconnectedness of personal and business circumstances and

priorities," targeted for Canadian Journal of Administrative Sciences.

Description: September 2018

Bujaki, M., Bourgeault, I., & Gaudet, S. (2018). "Academia as a Bourdieusian field: Masculine structures and their consequences for women."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	ACCT5125	Advanced Assurance	0.5	20	Main	100%
2024/Winter	ACCT5014	Financial Corporate Governance & Accountability	0.25	12	Main	100%
2024/Winter	ACCT5011	Financial Statement Analysis	0.25	15	Main	100%
2024/Winter	BUSI6000	Seminar in Accounting I	0.17	2	Main	33%
2023/Summer	ACCT5125	Advanced Assurance	0.5	26	Main	100%
2023/Summer	ACCT5125	Advanced Assurance	0.5	25	Main	100%
2023/Winter	BUSI6001	Seminar in Accounting II	0.12	1	Main	33%
2023/Winter	BUSI5081	Seminar in Accounting II	0.04	1	Main	33%
2023/Winter	ACCT5125	Advanced Assurance	0.5	11	Main	100%
2022/Summer	ACCT5125	Advanced Assurance	0.5	20	Main	100%
2022/Summer	ACCT5125	Advanced Assurance	0.5	27	Main	100%
2022/Winter	ACCT5125	Advanced Assurance	0.5	11	Main	100%
2022/Winter	BUSI6000	Seminar in Accounting I	0.08	1	Main	16%
2021/Summer	ACCT5125	Advanced Assurance	0.5	30	Main	100%
2021/Summer	ACCT5125	Advanced Assurance	0.5	25	Main	100%
2021/Winter	BUSI6001	Seminar in Accounting II	0.17	3	Main	33%
2021/Winter	ACCT5125	Advanced Assurance	0.5	13	Main	100%
2020/Summer	ACCT5125	Advanced Assurance	0.5	28	Main	100%
2020/Summer	ACCT5125	Advanced Assurance	0.5	26	Main	100%
2020/Winter	BUSI5080	Seminar in Accounting I	0.01	0	Main	3.2%
2020/Winter	ACCT5125	Advanced Assurance	0.5	22	Main	100%
2020/Winter	BUSI6000	Seminar in Accounting I	0.06	1	Main	12%
2018/Summer	ACCT5125	Advanced Assurance	0.5	15	Main	100%
2018/Summer	ACCT5125	Advanced Assurance	0.5	22	Main	100%
2018/Winter	ACCT5125	Advanced Assurance	0.5	12	Main	100%
2017/Fall	BUSI6000	Seminar in Accounting I	0.08	0	Main	
2017/Fall	ACCT5120	Advanced Concepts	0.5	15	Main	17%
2017/Summer	ACCT5120	Advanced Concepts	0.17	7	Main	33%
2017/Summer	ACCT5120	Advanced Concepts	0.17	7	Main	33%
2017/Summer	ACCT5120	Advanced Concepts	0.17	7	Main	33%
2017/Summer	ACCT5120	Advanced Concepts	0.17	7	Main	33%
2017/Summer	ACCT5125	Advanced Assurance	0.5	32	Main	100%
2017/Winter	ACCT5125	Advanced Assurance	0.5	8	Main	100%

2017/Winter	BUSI3007	Auditing II	0.5	58	Main	100%
2016/Fall	ACCT5120	Advanced Concepts	0.5	9	Main	25%
2016/Summer	ACCT5120	Advanced Concepts	0.5	34	Main	33%
2016/Summer	BUSI6001	Seminar in Accounting II	0.5	3	Main	34%
2015/Fall	BUSI6000	Seminar in Accounting I	0.13	3	Main	26%
2015/Fall	BUSI3007	Auditing II	0.5	68	Main	100%
2015/Fall	ACCT5125	Advanced Assurance	0.5	30	Main	100%
2015/Fall	ACCT5120	Advanced Concepts	0.08	9	Main	16%
2015/Summer	ACCT5120	Advanced Concepts	0.08	32	Main	16%

Service to the institution (Academic)

University Assignments

Faculty Advisor:

2019-2020: Master of Philanthropy and Nonprofit Leadership (MPNL), Carleton University

Masters Thesis Committees:

2023-2024: Victoria Cluney

2023-2024: Catherine Sarginson

2021-2022: Examiner, MA Defense (Psychology), Dorothy Shipley

2019-2020: Christine Tulk, MA Psychology

2019-2020: Katarina Lauch, MA Gender Studies

PhD. Comprehensive Committees:

2023-2024: Bertrand Lemieux

2023-2024: Anamika Jayendran

PhD. Thesis Committees:

2024-2025: Sandra Nelson

2023-2024: Jordanna Bergman

2023-2024: Taslima Nasreen

2018-2019: Nataliya Rytska, Examiner, Ph.D Defense (Public Policy)

External Committees

Thesis Assignments

PhD. Thesis Committees:

2020-2021: Douglas Tadeu de Oliveira Ribeiro, University of Sao Paulo, Brazil

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2021-2022: Tenure and Promotion Committee - Departmental (Cluster II)

University Assignments

Committee Chair:

2013-2014 – 2018-2019: Advisory Board, Centre for Research and Education on Women and Work (CREWW)

Promotion/Tenure Committees:

2020-2021: Promotion to Full Professor dossier

H. OTHER

Student Experience Activities

2017 - Speaker, Life Sciences Day : Speaker, "Healthy & Productive Knowledge Workers", Life Sciences Day, Carleton University, May 5, 2017.

2017 - Education Development Centre's Welcome to my Classroom series : Speaker, "Productive Writing Habits" as part of Education Development Centre's Welcome to my Classroom series, January 27, 2017.

Selected Media Appearances: Print

2022 - ThinkTwenty20: Mental Health and the Accounting Profession – Insights and Interventions from Recent Canadian Research : Bujaki, M., Himick, D., Paquette, S. 2022 "Mental Health and the Accounting Profession – Insights and Interventions from Recent Canadian Research", ThinkTwenty20. Summer 2022

Selected Media Appearances: Online

2022 - Check up" in Pivot: Interview

Credentials

Professional Memberships

American Accounting Association, 2015

Canadian Academic Accounting Association, 2002

Administrative Sciences Association of Canada, 1996-1998

Institute of Chartered Accountants of Ontario, 1996

Chartered Professional Accountants of Canada (CPA Canada), 1990

Chartered Professional Accountants of Ontario (CPA Ontario), 1990

Executive or Professional Education

2015 - Facilitator, CPA Prerequisite Education Program. Chartered Professional Accountants of Ontario (CPA Ontario) [Activity: Delivery of Professional Education]

2014 - Seminar Leader, School of Accountancy, Institute of Chartered Accountants of Ontario. [Activity: Delivery of Professional Education]

2014 - Facilitator, CPA Prerequisite Education Program. Chartered Professional Accountants of Ontario (CPA Ontario) [Activity: Delivery of Professional Education]

2013 - Seminar Leader, School of Accountancy, Institute of Chartered Accountants of Ontario. [Activity: Delivery of Professional Education]

2012 - Seminar Leader, School of Accountancy, Institute of Chartered Accountants of Ontario. [Activity: Delivery of Professional Education]

2011 - Seminar Leader, School of Accountancy, Institute of Chartered Accountants of Ontario. [Activity: Delivery of Professional Education]

2010 - Seminar Leader, School of Accountancy, Institute of Chartered Accountants of Ontario. [Activity: Delivery of Professional Education]

Research Reports

2023: Bujaki, M., Lento, C., & Hall, C., Indigenous perspectives on employment in the Canadian banking sector: Preliminary insights., submitted to Journal of Aboriginal Management.

2022: Isabelle, D., & Bujaki, M., Knowledge Synthesis of Mentorship and Sponsorship Strategies and Programs Available to Women in Key Economic Sectors that are Growing and Emerging., submitted to Women and Gender Equality Canada.

2022: Bujaki, M., MacLean, S. E., Redmond, M., Sabra, S., Smith, S., Ysseldyk, R. Faculty Writing Supports: Assessing the Impact of Research Supports during the COVID-19 Pandemic and Recommendations for the Future., submitted to Carleton University.

Service to the Community

Chair of a Committee

2019: Healthy Professional Work Project, Executive Committee Member, Healthy Professional Work Project

2018 – 2019: Healthy Professional Work Project, Co-chair, Accounting case project, Healthy Professional Work Project

Member of a Committee

2018: Elevate Aviation, Advisory Board member

2015 – 2017: Advisory Board, Advancing Women through Mentorship Program, Ottawa Community Immigrant Services Organization

Other Community Service Activities

2018: Writing Workshop, Queen Elizabeth Scholars program., Facilitator (April – June).

2010 – 2012: Consultant, Native Women's Association of Canada

Speech / Presentation at a Community Meeting

2019: Public Sector Network, Moderator, Women in Leadership, Public Sector Network, Ottawa, Ontario, November 22, 2019

2019: Healthy Professional Worker Project,, Speaker, Healthy Professional Worker Project, "The Life Course Calendar as a Research Tool", Webinar, December 12, 2019

2018: Social Network of Women, International Women's Day Introductory address, March 24, 2018

2017: Canada-India Diversity Workshop, Speaker, Canada-India Diversity Workshop (with Smita Bhardia), June 27, 2017.

2017: Welch LLP Women in Leadership group, "Encouraging Women's Leadership through Mentoring", Welch LLP Women in Leadership group, November 3, 2017.

2017: Webinar, Credit Institute of Canada, "Linking Financial Statements and Strategy", November 28, 2017.

Curriculum Vitae - Sprott School of Business

Shannon Butler, MEd
Associate Professor, Teaching Stream - Tenured, 2020
Sprott School of Business (Accounting)
Telephone: 613-520-2600 x2030
Email: shannon.butler@carleton.ca
AACSB Qualification: Scholarly Practitioner (SP) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Master of Education. Nipissing University.
Bachelor of Administrative Commercial Studies. University of Western Ontario.
Diploma. University of Western Ontario.
Title: *With Distinction*

Professional Certifications

Chartered Professional Accountant (CPA), 2013, Toronto, Ontario.
Certificate in Teaching at the University Level, 2009, University of Western Ontario.
Chartered Accountant (CA), 2009, Toronto, Ontario.

B. EMPLOYMENT

Academic Appointments

Instructor, Carleton University (2015 - Present), Ottawa, Canada.

- Teaching Mentor; part of the Teaching Mentors Pilot Project year 3.
- Member of the Teaching and Learning Computing Committee (University level committee), year 2.
- Member of the Teaching and Learning Council (University level committee), year 2.
- Member of Experiential Learning Committee (University level committee).
- Member of Accounting hiring committee, 2016, 2017 & 2018 (Faculty level committee)
- Course coordinator & Instructor of BUSI 1005, Introduction to Managerial Accounting
- Instructor of BUSI 3008, Intermediate Managerial Accounting (in class and online).
- Instructor of BUSI 4008, Advanced Management Accounting and Control (in class and online).
- Designed and developed BUSI 3008 online (section R).
- Received funding from MTCU for development as part of the 2015-2016 shared online course fund (ecampusOntario)
- Lead an open faculty session on how to use the iPad in the classroom for better engagement BCom Subcommittee Attended and participated in various events and courses through EDC

Instructor, University of Western Ontario (2009 - Present), London, Canada-Ontario.

- Lecturer of Intermediate accounting I and II (MOS 3360A & MOS 3361B)
- Lecturer of Managerial accounting (MOS 3370 & MOS 3371) both online and blended in-class section
- Developed MOS 3370 & MOS 3371 blended sections (2 hours per week in-class combined with 1 hour per week on-line)
- Developed and produced content videos, walkthrough problem videos and discussion starter videos
- Responsible for the preparation of material to be covered in class, monitoring student progress, designing exams and marking exams.
- Developed and designed two new in-class courses: Advanced Audit (MOS 4463A/B) and EDP Audit
- Member of the Academic staff Joint Pension Board
- Accounting faculty representative for the implementation of the new strategy for the DAN Management Program

Seminar Leader, Institute of Chartered Accounts of Ontario, School of Accountancy (2011), N/A, Canada-Ontario.

- Lecturer of Intermediate accounting I and II (MOS 3360A & MOS 3361B)
- Lecturer of Managerial accounting and course co-coordinator 2010 - 2012 years (MOS 3372)

Other Employment

Help me solve it Video Production & Author, Pearson Education (2018 - Present), Toronto, Canada-Ontario. Produced professional walkthrough videos of technical accounting problems to be included with the instructor and student resources for the following textbooks:

- Horngren, Cost Accounting: A Managerial Emphasis, 8th edition

Power Point Supplement Author, McGraw-Hill Ryerson Limited (June, 2013 - Present), NA, Canada. Created all of the power point supplement slides to be included with the instructor resources for the following textbooks:

- Herauf's Modern Advanced Accounting in Canada 9th edition
- Phillips Fundamentals of Financial Accounting, 5th Canadian Edition
- Garrison's Managerial Accounting, 11th Canadian Edition
- Phillips Fundamentals of Financial Accounting, 4th Canadian Edition
- Garrison's Managerial Accounting, 10th Canadian Edition
- Brewer's Introduction to Managerial Accounting, 4th Canadian Edition
- Hilton/Herauf's Modern Advanced Accounting in Canada, 8th Edition
- Beechy's Intermediate Accounting, Volume 1 & 2, 7th Canadian Edition
- Garrison's Managerial Accounting, 11th Canadian Edition

Help me solve it Video Production & Author, McGraw-Hill Ryerson Limited (2013 - Present), N/A, Canada. Produced professional walkthrough videos of technical accounting problems to be included with the instructor and student resources for the following textbooks:

- Smieliauskas's Auditing, an International Approach 8th edition
- Garrison's Managerial Accounting, 11th Canadian Edition
- Larson's Fundamental Accounting Principles 16th ed, Volume 1 & 2
- Phillips Fundamentals of Financial Accounting, 5th Canadian Edition
- Horngren, Cost Accounting: A Managerial Emphasis, 8th edition
- Phillips Fundamentals of Financial Accounting, 4th Canadian Edition
- Garrison's Managerial Accounting, 10th Canadian Edition
- Beechy's Intermediate Accounting, Volume 1 & 2, 6th Canadian Edition
- Larson's Fundamental Accounting Principles, Volume 1 & 2
- Brewer's Management Accounting, 5th Edition
- Libby's Financial Accounting, 6th Edition
- Beechy's Intermediate Accounting, Volume 1 & 2, 7th Canadian Edition

Reviewer and Accuracy Checker of Online Accounting Content, McGraw-Hill Ryerson Limited (November, 2011 - January, 2012), NA, Canada.

- Reviewed and tested the functionality and technical accuracy of the Homework Assessment content within the Connect online product to accompany Garrison et al.-Managerial Accounting 9ce
- Completed each question for all chapters ensuring:
- Content of each question matched the corresponding question in the textbook
- Appropriate presentation and formatting
- Instructions for students to complete the questions were clear
- Questions were graded appropriately and feedback was relevant
- The system recognized mistakes that i intentionally made
- Counseled the publisher on the overall project from the point of view of an experienced instructor on the subject including style, presentation, student and instructor requirements and other aspects of the product

Senior Tax Analyst, Deloitte & Touche LLP (2005 - 2008), London, Canada-Ontario.

- Prepare personal, trust, and corporate tax returns
- Conducted tax research on various topics and technical issues
- Interact with CRA, legal firms and clients on a regular basis

Senior Associate, Audit and Assurance Group, PricewaterhouseCoopers LLP (2005 - 2008), London, Canada-Ontario.

- Directed audit team in year-end audits
- Supervised and coached associates on numerous technical issues and client relationships
- Prepared financial statements
- Conducted meetings with clients to provide recommendations for improving system and controls functions
- Served as UFE mentor for successful UFE writer in 2007

Accountant/Bookkeeper, Nevin Motors (2004), Lucan, Canada-Ontario.

- Managed accounts payable, accounts receivable, inventory control, reconciliation of accounts
- Conducted daily and weekly bank deposits, bank reconciliations and customer service

C. PROFESSIONAL HONOURS

2018: Professional Achievement Award, Carleton University.

2018: Raving Raven Award, Carleton University.

2017: Raving Raven award, Carleton University.

2016: Excellence in Teaching with Technology Award, Carleton University.

2014: President's Gold Medal Award, Nipissing University. President's Gold Medal Award, awarded in recognition of the highest academic standing at the Masters of Education degree program..

2014: Academic Medal, Governor General's. Awarded for the highest academic standing in all graduate degree programs..

2010 – 2012: USC Teaching Honor Roll award, Western University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Refereed Scholarly Publications

Other (Non-refereed) Scholarly Publications

Chapters in non-refereed books

Butler, S. (2015). Walkthrough Video: Help Me Solve It. *Fundamentals of Financial Accounting*. McGraw-Hill Ryerson.

Description: 4th Canadian Edition - Video Production and Author

Butler, S. (2014). Walkthrough Video: Help Me Solve It. *Managerial Accounting*. McGraw-Hill Ryerson.

Description: 10th Canadian Edition - Video Production and Author

Butler, S. (2014). Walkthrough Video: Help Me Solve It. *Intermediate Accounting*. McGraw-Hill Ryerson.

Description: 6th Canadian Edition - Video production and author

Butler, S. (2013). Walkthrough Video: Help Me Solve It. *Fundamental Accounting Principles*. McGraw-Hill Ryerson.

Description: 14th Edition - Video production and author

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Reviewer: Book / Textbook

2012: McGraw Hill Ryerson.

- Reviewed and tested the functionality and technical accuracy of the Homework Assessment content within the Connect online product to accompany Garrison et al.-Managerial Accounting 9ce
- Completed each question for all chapters ensuring: Content of each question matched the corresponding question in the textbook, appropriate presentation and formatting, instructions for students to complete the questions were clear, questions were graded appropriately and feedback was relevant, the system recognized mistakes that i intentionally made, and counseled the publisher on the overall project from the point of view of an experienced instructor on the subject including style, presentation, student and instructor requirements and other aspects of the product.

2011: Pearson Education Canada. Diarist Review of Intermediate Accounting, 1st Canadian edition by Lo/Fisher. Performed a chapter by chapter review and comparison to other intermediate accounting texts.

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI1002	Management Accounting	0.5	70	Main	100%
2023/Fall	BUSI1005	Managerial Accounting for Business Students	0.5	353	Main	100%
2023/Fall	BUSI1002	Management Accounting	0.5	56	Main	100%
2023/Summer	ACCT5012	Performance Measurement & Control	0.25	28	Main	100%
2022/Fall	BUSI1005	Managerial Accounting for Business Students	0.5	387	Main	100%
2022/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	79	Main	100%

2021/Fall	BUSI1005	Managerial Accounting for Business Students	0.5	334	Main	100%
2021/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	51	Main	100%
2020/Fall	BUSI1005	Managerial Accounting for Business Students	0.5	68	Main	100%
2020/Fall	BUSI1005	Managerial Accounting for Business Students	0.5	89	Main	100%
2020/Fall	BUSI1005	Managerial Accounting for Business Students	0.5	59	Main	100%
2020/Summer	BUSI3008	Intermediate Management Accounting	0.5	75	Main	100%
2020/Summer	BUSI1005	Managerial Accounting for Business Students	0.5	95	Main	100%
2020/Winter	BUSI4008	Advanced Management Accounting & Control	0.5	57	Main	100%
2020/Winter	BUSI3008	Intermediate Management Accounting	0.5	82	Main	100%
2020/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	90	Main	100%
2019/Summer	BUSI4008	Advanced Management Accounting & Control	0.5	63	Main	100%
2019/Summer	BUSI3008	Intermediate Management Accounting	0.5	61	Main	100%
2019/Summer	BUSI1005	Managerial Accounting for Business Students	0.5	38	Main	100%
2019/Winter	BUSI4008	Advanced Management Accounting & Control	0.5	49	Main	100%
2019/Winter	BUSI3008	Intermediate Management Accounting	0.5	66	Main	100%
2019/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	75	Main	100%
2018/Fall	BUSI1005	Managerial Accounting for Business Students	0.5	83	Main	100%
2018/Summer	BUSI4008	Advanced Management Accounting & Control	0.5	49	Main	100%
2018/Summer	BUSI3008	Intermediate Management Accounting	0.5	68	Main	100%
2018/Winter	BUSI4008	Advanced Management Accounting & Control	0.5	42	Main	100%
2018/Winter	BUSI3008	Intermediate Management Accounting	0.5	84	Main	100%
2017/Fall	ACCT5131	Performance Management	0.5	49	Main	100%
2017/Fall	BUSI4008	Advanced Management Accounting & Control	0.5	61	Main	100%
2017/Fall	BUSI4008	Advanced Management Accounting & Control	0.5	20	Main	100%
2017/Summer	BUSI4008	Advanced Management Accounting & Control	0.5	32	Main	100%
2017/Summer	BUSI3008	Intermediate Management Accounting	0.5	61	Main	100%
2017/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	85	Main	100%
2017/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	94	Main	100%
2016/Fall	BUSI1004	Financial Accounting for Business Students	0.5	88	Main	100%
2016/Fall	BUSI1004	Financial Accounting for Business Students	0.5	89	Main	100%
2016/Fall	BUSI3008	Intermediate Management Accounting	0.5	83	Main	100%
2016/Fall	BUSI1004	Financial Accounting for Business Students	0.5	84	Main	100%
2016/Winter	BUSI1005	Managerial Accounting for Business Students	0.08	18	Main	15%
2016/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	70	Main	100%
2016/Winter	BUSI1005	Managerial Accounting for Business Students	0.42	101	Main	85%
2015/Fall	BUSI1004	Financial Accounting for Business Students	0.5	74	Main	100%
2015/Fall	BUSI1004	Financial Accounting for Business Students	0.29	19	Main	58%

2015/Fall	BUSI3008	Intermediate Management Accounting	0.5	63	Main	100%
2015/Fall	BUSI1004	Financial Accounting for Business Students	0.21	14	Main	42%
2015/Fall	BUSI1004	Financial Accounting for Business Students	0.5	73	Main	100%

Service to the institution (Academic)

Innovation in Teaching Methods

Innovations in Course Content / Presentation

2015 - Course development (Distance Education).

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2020-2021: Teaching Mentors Project

Credentials

Curriculum Vitae - Sprott School of Business

Shaohan (Alan) Cai, PhD
Full Professor - Tenured, 2011
Sprott School of Business (Technology and Operations/Supply Chain Management)
Telephone: 613-520-2600 x2453
Email: alan.cai@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-7891-2881>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. New Mexico State University.
Title: *Dissertation: The impacts of inter-organizational internet communication on purchasing performance*
Master of Business Administration. New Mexico State University.
Bachelor of Arts. Fudan University.

B. EMPLOYMENT

Academic Appointments

Associate Professor (tenured), Sprott School of Business, Carleton University (2011 - Present), Ottawa, Canada-Ontario.
Associate Professor, Sprott School of Business, Carleton University (2008 - 2011), Ottawa, Canada-Ontario.
Associate Professor (tenured), Faculty of Business Administration, Lakehead University (2007 - 2008), Thunder Bay, Canada-Ontario.
Assistant Professor, Faculty of Business Administration, Lakehead University (2003 - 2007), Thunder Bay, Canada-Ontario.

Other Employment

Operational Team Leader, Fujian Start Computer Group Co., Ltd. (January, 1998 - June, 1998), NA, Unknown.
Sales Representative, Fujian Start Computer Group Co., Ltd. (August, 1997 - January, 1998), NA, Unknown.

C. PROFESSIONAL HONOURS

2022: Carol-Ann Tetrault Sirsly Award, Sprott School of Business, Carleton University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	6	25		31
Articles-in-Progress (All)	3	18		21
Paper Presentations (Refereed)		1		1
Grants - Funded (both refereed and non-refereed)	2	3		5
Totals	11	47		58

Refereed Scholarly Publications

Articles in Refereed Journals

Wang, Z., Guan, C., & Cai, S. (2024). How authentic leadership affects green creativity: the role of self-reflection and psychological capital. *Chinese Management Studies*, 18 (1), 71-90. [C]
Vol. ahead-of-print No. ahead-of-print. DOI only
volume assigned in 2024

Lu, H., Cai, S., Liu, Y., & Chen, H. (2023). How GHRM impacts employee OCBE: the role of emotions and value discrepancy. *International Journal of Manpower*, 44 (2), 318-333. [A]
Vol. ahead-of-print No. ahead-of-print. DOI only
Volume assigned in 2023

Wang, Z., Doren, C., Cai, S., & Ren, S. (2023). Enterprise level responses to environmental institutional pressure: Focus on legitimization strategies. *Journal of Cleaner Production*, 382 (1), 135148. [A,Other]

volume assigned in 2023

Wang, Z., Song, D., Ren, S., Rosenberg, B. D., & Cai, S. (2023). Team reflexivity, thriving at work and employees' work-to-family enrichment: a multilevel perspective. *Journal of Managerial Psychology*, 38 (7), 465-479. [B]

Wang, Z., Chen, Y., Ren, S., Collins, N., Cai, S., Chris Rowley (2023). Exploitative leadership and employee innovative behaviour in China: a moderated mediation framework. *Asia-Pacific Business Review*, 29 (3). [B]

Wang, Z., Zhang, H., Cai, S., & Cui, T. (2023). How does exploitative leadership shape employee's workplace venting? *Current Psychology*, 18 (3), 286–295. [C]

Ye, X., Cai, S., Li, X., & Wang, Z. (2023). How and when top management green commitment facilitates employees green behavior: a multilevel moderated mediation model. *Chinese Management Studies*, 17 (5), 970-990. [C]

Volumen assigned in 2023

Wang, Z., Cai, S., Ren, S., & Singh, S. K. (2023). Green operational performance in a high-tech industry: Role of green HRM and green knowledge. *Journal of Business Research*, 160, 113761. [A]

Cai, S., Wang, Z., & Yang, Z. (2023). Does community attitude matter? The effects of local community environmental orientation on firms' environmental practices. *Corporate Social Responsibility and Environmental Management*. [C]

DOI only Early View

Online Version of Record before inclusion in an issue

Cai, S., Wang, X., Ma, Y., Zhou, X., & Yang, Z. (2022). Boundary spanner closeness to partner firm as relational governance in turbulent versus stable environments. *European Journal of Marketing*, 56 (1), 252-282. [A+]

Paid in 2021 (check)

Wang, Z., Cui, T., Cai, S., & Ren, S. (2022). How and when high-involvement work practices influence employee innovative behavior. *International Journal of Manpower*, 43 (5), 1221-1238. [A]

Wang, Z., Cui, T., & Cai, S. (2022). How and when team reflexivity influences employee innovative behavior. *Journal of Managerial Psychology*, 37 (1), 61-75. [B]

Wang, Z., Cui, T. and Cai, S. (2022), "How and when team reflexivity influences employee innovative behavior", *Journal of Managerial Psychology*, Vol. 37 No. 1, pp. 61-75. <https://doi.org/10.1108/JMP-11-2020-0590>

Lu, H., Xu, W., Cai, S., Yang, F., & Chen, Q. (2022). Does top management team responsible leadership help employees go green? The role of green human resource management and environmental felt-responsibility. *Corporate Social Responsibility and Environmental Management*, 29 (4), 843-859. [C]

Wang, Z., Cui, T., Cai, S., & Ren, S. (2022). Team reflexivity, individual intellectual capital and employee innovative behavior: A multilevel moderated mediation. *Journal of Intellectual Capital*, 23 (6), 1276-1295. [B]

Vol. ahead-of-print No. ahead-of-print

Wang, J., Cai, S., Xie, Q., & Chen, L. (2022). The influence of community engagement on seller opportunistic behaviors in e-commerce platform. *Electronic Commerce Research*, 22, 1377–1405. [A]

Published online: 10 March 2021

Volume Assigned in 2022 (GS)

Yang, Z., Zhu, N., Cai, S., & Sun, H. (2022). Understanding the differences between Chinese and Western business practices: insights into Confucian philosophy. *European Journal of International Management*, 17 (2-3), 180-197. [C]

Forthcoming and Online First Article with DOI

Volume assigned in 2022

Ye, X., Cai, S., & Wang, Z. (2022). The effect of abusive supervision on safety behaviour of Chinese underground miners: a multi-level moderated mediation analysis. *Chinese Management Studies*, 16 (5), 1124-1144. [C]

Vol. ahead-of-print No. ahead-of-print.

Volume assigned in 2022 (GS)

Wang, Z., Chen, Y., Ren, S., Collins, N., Cai, S., Chris Rowley (2022). Exploitative leadership and employee innovative behavior in China: A moderated mediation framework. *Asia-Pacific Business Review*. [B]

Published online with DOI

Zhining Wang, Yuhang Chen, Shuang Ren, Ngan Collins, Shaohan Cai & Chris Rowley (2021) Exploitative leadership and employee innovative behaviour in China: a moderated mediation framework, *Asia Pacific Business Review*, DOI: 10.1080/13602381.2021.1990588

Wang, Z., Meng, L., & Cai, S. (2022). Work reflection during leisure time and employee creativity: The role of psychological capital. *Journal of Management and Organization*. [B]

forthcoming: Published online by Cambridge University Press: 17 June 2020

2021 Reconciliation (Jan 2022), article has DOI counts for 2021

Wang, Z., Meng, L., Cai, S., & Jiang, L. (2020). Work reflection during leisure time and employee creativity: The role of psychological capital. *Journal of Management & Organization*, 1-13. doi:10.1017/jmo.2020.10

Wang, Z., Guan, C., Ren, S., & Cai, S. (2022). Workplace ostracism and team members' creativity: The mediating role of self-reflection and moderating role of high involvement work practices. *Journal of Management and Organization*, 1-19. [B]

DOI only

Cai, S., Wang, X., Zhou, X., Hyman, M. R., & Yang, Z. (2021). Political and Community Logics Jointly Affect 'Social Distancing' Compliance. *Sustainable Cities and Society*, 74, 103200. [A,Other]

Wang, Z., Sun, C., & Cai, S. (2021). How Exploitative Leadership Influence Employee Innovative Behavior----the Mediating Role of Relational Attachment and Moderating Role of High-Performance Work System. *Leadership & Organization Development Journal*, 42 (2), 233-248. [B]

Wang, Z., Bu, X., & Cai, S. (2021). Core self-evaluation, individual intellectual capital and employee creativity. *Current Psychology*, 40, 1203-1217. [C]

Wang, X., Pan, H., Zhu, N., & Cai, S. (2021). East Asian films in the European market: the roles of cultural distance and cultural specificity. *International Marketing Review*, 38 (4), 717-735. [A]

Forthcoming Online Pub: 9 July 2020

Updated Jan 2022 as published for 2021 (2021 Reconciliation)

Wang, Z., Cai, S., Liang, H., Wang, N., & Xiang, E. (2021). Intellectual capital and firm performance: the mediating role of innovation speed and quality. *International Journal of Human Resources Management*, 32 (6), 1222-1250. [A]

Wang, Z., Guan, C., Cui, T., Cai, S., & Liu, D. (2021). Servant leadership, team reflexivity, coworker support climate and employee creativity: A multilevel perspective. *Journal of Leadership and Organizational Studies*, 28 (4), 465-478. [C]

Cai, S., Jun, M., Wang, X., & Yang, Z. (2021). On boundary spanners and interfirm embeddedness: the moderating effect of guanxi institution in China. *Journal of Purchasing and Supply Management*, 27 (1), 100671. [A]

Wang, Z., Ren, S., Chadee, D., Liu, M., & Cai, S. (2021). Team reflexivity and employee innovative behavior: The mediating role of knowledge-sharing and moderating role of paternalistic leadership. *Journal of Knowledge Management*, 25 (5), 1619-1639. [A]

Forthcoming

Published in 2021. Updated Jan 2022

Cai, S., Jun, M., & Yang, Z. (2020). The joint effects of formal institutions and business characteristics on interfirm guanxi practices in China: A fuzzy set analysis. *Journal of Business-to-Business Marketing*, 27 (2), 151-174. [B]

12 May 2020

Wang, Z., Cai, S., & Liu, D. (2020). The Effects of Self-Reflection on Individual Intellectual Capital. *Journal of Intellectual Capital*, 21 (6), 1469-1930. [B]

Wang, Z., Meng, L., & Cai, S. (2019). Servant leadership and innovative behavior: a moderated mediation. *Journal of Managerial Psychology*, 34 (8), 505-518. [B]

Publication date: 11 November 2019

Wang, Z., Liu, D., & Cai, S. (2019). Self-Reflection and Employee Creativity: The Mediating Role of Individual Intellectual Capital and the Moderating Role of Concern for Face. *Chinese Management Studies*, 13 (4), 895-917. [C]

Accepted 4 May 2019, Publication date: 4 November 2019

Cai, S. (2018). Revisiting tradeoffs in manufacturing strategy: A fuzzy set approach for developing a typology of competitive priorities. *Asian Journal of Business Research*, 8 (1), 1-26. [C]

Cai, S., & Jun, M. (2018). A qualitative study of the internalization of ISO 9000 standards: the linkages among firms' motivations, internalization processes, and performance. *International Journal of Production Economics*, 196 (1), 248-260. [A]

Cai, S., & Yang, Z. (2017). Trust, Information Integration, and Coordination Costs: An Integrative Model. *Asian Journal of Business Research*, 7 (1), 80-93. [C]

Cai, S., Jun, M., & Yang, Z. (2017). The Effects of Boundary Spanners' Personal Relationships on Interfirm Collaboration and Conflict: A Study of the Role of Guanxi in China. *Journal of Supply Chain Management*, 53 (3), 19-40. [A]

Cai, S. (2017). Manufacturing strategies in different environments: Does equifinality or a dominant strategy exist? *International Journal of Management and Enterprise Development*, 16 (3), 243-273.

Cai, S., & Jun, M. (2015). Relationship between information richness and exchange outcomes: Moderating effects of media richness and governance mechanisms. *International Journal of Information Systems and Supply Chain Management*, 8 (1), 1-21. [C]

Cai, S., & Yang, Z. (2014). The role of Guanxi institution in skill acquisition between firms: A study of Chinese firms. *Journal of Supply Chain Management*, 50 (4), 3-23. [A]

Jia, F., Cai, S., & Xu, S. (2014). Interacting effects of uncertainties and institutional forces on information sharing in marketing channels. *Industrial Marketing Management*, 43 (5), 737-746. [A+]

Yang, Z., Jia, F., & Cai, S. (2014). The performance implications of perceptual differences of dependence in marketing channels: The mediating role of trust. *Asia-Pacific Journal of Marketing and Logistics*, 26 (3), 344-364. [A]

(The paper is selected by the journal's editorial team as a Highly Commended Paper of 2014)

Cai, S., & Yang, Z. (2014). On the relationship between business environment and competitive priorities: The role of performance frontiers.

International Journal of Production Economics, 151 (1), 131-145. [A]

Jiang, L., Waller, D. S., & Cai, S. (2013). Does ownership type matter for innovation? Evidence from China. *Journal of Business Research*, 66 (12), 2473-2478. [A]

Cai, S., Yang, Z., & Jun, M. (2011). Cooperative norms, structural mechanisms, and supplier performance: Empirical evidence from Chinese manufacturers. *Journal of Purchasing and Supply Management*, 17 (1), 1-10. [A]

(The paper is chosen by the Editor of the Journal to be highlighted in Editors' Choice.)

Cai, S., Jun, M., & Yang, Z. (2010). Implementing supply chain information integration in China: The role of institutional forces and trust. *Journal of Operations Management*, 28 (3), 257-268. [A+,FT50]

Jun, M., & Cai, S. (2010). Examining the relationships between internal service quality and its dimensions, and internal customer satisfaction. *Total Quality Management and Business Excellence*, 21 (2), 205-223. [B]

Cai, S., Yang, Z., & Hu, Z. (2010). The effects of volume consolidation on buyer-supplier relationships: A study of Chinese firms. *Journal of Purchasing and Supply Management*, 16 (3), 152-162. [A]

Articles in Refereed Conference Proceedings

Full Paper

Cai, S., & Jun, M. (2014). Norms of conspiracy between service provider and industrial customer: A study on the role of registrar in ISO 9001 certification. *International Conference on Management and Engineering (CME)*, 1757-1765.

Section IV: Financial Management.

Cai, S., & Jun, M. (2013). Service provider and industrial customer's opportunistic behaviors in the principal-agent-stakeholder triangle: A study on the role of registrar in ISO 9001 certification. *Service Management and Science Forum*.

Cai, S., & Jun, M. (2012). Examining the relationships between environmental forces, key elements of interorganizational guanxi, and exchange outcomes. *Decision Sciences Institute Annual Meeting*.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Cai, S. (2019). *On the firms' strategy to deal with local environmental regulation: the role of local embeddedness and environmental fit*. Annual Conference of the Production and Operations Management Society, Washington D.C., Washington.

Cai, S. (2018, May). *The joint effects of formal institutions and interdependence on utilizing personal connection in interfirm relationship*. Annual Conference of the Production and Operations Management Society, Houston, Texas.

Cai, S. (2017, May). *ISO 9000 internalization dimensions and their effects*. Annual Conference of the Production and Operations Management Society (POMS), Seattle, Washington.

Description: 28th Annual Conference of the Production and Operations Management Society, Seattle, Washington , May 5th.

Cai, S. (2016, May). *A fuzzy set approach to develop a typology of competitive priorities*. Annual Conference of the Production and Operations Management Society (POMS), Orlando, Florida.

Description: 27th Annual Conference of the Production and Operations Management Society, Orlando, Florida, May 7th.

Cai, S. (2015, May). *Manufacturing strategies in different environments: Does equifinality or a dominant strategy exist?* Annual Conference of the Production and Operations Management Society (POMS), Washington D.C, Washington.

Description: 26th Annual Conference of the Production and Operations Management Society, Washington D.C. May 8th.

Cai, S. (2014, October). *The impact of ownership on supply chain communication: Chinese state-owned enterprise vs. Non-state-owned companies*. Academy of Business Research Conference, Las Vegas, Nevada.

Description: Academy of Business Research Fall 2014 Conference, Las Vegas, Nevada, October 15th.

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 4 of 4]: Cai, S. National Natural Science Foundation of China, Co-Investigator, National Natural Science Foundation of China. Not in ROMEO 480,000 Chinese Yuan, for the project "the influence of external emergency on the marketing strategy of domestic and international companies" (Co-investigator). [Status: Funded]

2024 [Year 4 of 4]: Cai, S. Insight Grant (\$28,877.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 3 of 4]: Cai, S. National Natural Science Foundation of China, Co-Investigator, National Natural Science Foundation of China. Not in ROMEO 480,000 Chinese Yuan, for the project "the influence of external emergency on the marketing strategy of domestic and international

companies" (Co-investigator). [Status: Funded]

2023 [Year 3 of 4]: Cai, S. Insight Grant (\$28,877.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 2 of 4]: Cai, S. National Natural Science Foundation of China, Co-Investigator, National Natural Science Foundation of China. Not in ROMEO 480,000 Chinese Yuan, for the project "the influence of external emergency on the marketing strategy of domestic and international companies" (Co-investigator). [Status: Funded]

2022 [Year 2 of 4]: Cai, S. Insight Grant (\$28,877.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 1 of 4]: Cai, S. National Natural Science Foundation of China, Co-Investigator, National Natural Science Foundation of China. Not in ROMEO 480,000 Chinese Yuan, for the project "the influence of external emergency on the marketing strategy of domestic and international companies" (Co-investigator). [Status: Funded]

2021: Cai, S. CU COVID-19 Rapid Research Response Grants, Principal Investigator, PRI-Carleton University. [Status: Not Funded]

2021 [Year 1 of 4]: Cai, S. Insight Grant (\$28,877.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2020 [Year 4 of 4]: Cai, S. Insight Grant (\$24,942.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2019 [Year 4 of 4]: Cai, S. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019 [Year 3 of 4]: Cai, S. Insight Grant (\$24,942.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2019 [Year 2 of 2]: Cai, S. Insight Development Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 3 of 4]: Cai, S. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 2 of 4]: Cai, S. Insight Grant (\$24,942.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2018 [Year 1 of 2]: Cai, S. Insight Development Grant (\$25,835.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2017 [Year 2 of 4]: Cai, S. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2017 [Year 1 of 4]: Cai, S. Insight Grant (\$24,942.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016 [Year 1 of 4]: Cai, S. Insight Grant (\$25,600.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016: Cai, S. Insight Grant, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2015: Cai, S. Research Achievement Award (\$15,000.00 Not Funded), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Not Funded]

2013: Cai, S. Insight Development Grant (\$22,151.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Advisor

2015 – 2017: Association for Operations Management (APICS). Advisor to student chapter of APICS at Carleton University

Board Member: PRJ Editorial Review Board

2022 – 2023: Asian Journal of Business Research.

2018 – 2023: Journal of Business Ecosystems.

Member: Committee/Task Force

2015 – 2017: Supply Chain Management Association (SCMA). Academic Advisory Committee for Case Competition

2012: Ontario Postsecondary Education Quality Assessment Board. Member, Quality Assessment Panel for Algonquin College

Reviewer: Ad Hoc Reviewer for a Journal

2020: Journal of Business Research.

2020: African Journal of Management.

2018 – 2020: Industrial Marketing Management.

2019: Journal of Supply Chain management.

2019: Journal of Business Ecosystems.

2019: International Marketing Review.

2017: European Journal of Marketing.

2016 – 2017: Journal of Supply Chain Management.

2015 – 2017: International Journal of Production Economics.

2016: Transportation Research.

2016: Industrial Marketing Management.

2015 – 2016: Journal of Business Research.

2015: Production Planning & Control.

2015: Journal of Operations Management. 3 papers

2015: International Journal of Production Research.

2014: Production and Operations Management.

2013: Journal of Business Research.

2013: Industrial Marketing Management.

2011: Science and Engineering Management.

2011: International Journal of Management.

2011: Asia Pacific Management Review.

2010: Transportation Research.

2010: Industrial Marketing Management.

2010: Electronic Commerce Research and Applications.

2009 – 2010: Journal of Business Research.

Scholarly Work in Progress

Papers Under Review

Wang, Z., Yao, Y., & Cai, S. (2023). "Authentic leadership, proactive goal regulation and help-seeking behavior: a multilevel moderated mediation," Initial submission to *Leadership & Organization Development Journal*.

Cai, S., Wang, X., & Yang, Z. (2023). "The effect of supply delay on geographic clusters' performance during crises: A study of small businesses during the Covid-19 pandemic.," Initial submission to *Journal of Operations Management*.

Cai, S., Wang, X., & Yang, Z. (2023). "How do institutional forces promote social actions through during emerging life-threatening events?: Business policies, social capital, and cultural tightness," Revised and resubmitted to *Journal of Service Research*.

Wang, Z., Yao, Y., & Cai, S. (2023). "Authentic Leadership and employee expediency: A moderated mediation framework," Initial submission to *Journal of Managerial Psychology*.

Lu, H., Xu, W., Cai, S., Yang, F., & Chen, Q. (2023). "Does Top Management Team Responsible Leadership Help Employees Go Green? Organizational Citizenship Behavior for the Environment," Initial submission to *Corporate Social Responsibility and Environmental Management*.

Wang, Z., Ren, S., Usman, M., Guo, X., & Cai, S. (2023). "How does a supervisor's bottom-line mentality influence work connectivity behavior after work? Important roles of employee performance-prove goal orientation and competitive climate," Initial submission to *Asia Pacific Journal of Management*

Luo, Y., Cai, S., Xie, Q., & Wang, J. (2023). "The impact of multiple similar online certifications on seller performance in e-commerce platforms," Initial submission to *Journal of Business Research*.

Wang, Z., Guo, X., & Cai, S. (2023). "Supervisors bottom-line mentality and their family ostracism: The mediating role of emotional exhaustion," Initial submission to *Current Psychology*.

Wang, Z., Zhang, H., & Cai, S. (2023). "Participative leadership and team creativity: the role of team intellectual capital and colleague social support," Initial submission to *Knowledge Management Research & Practice*.

Description: Journal: **Knowledge Management Research & Practice**

Wang, Z., Zhang, H., & Cai, S. (2023). "Participative leadership, team intellectual capital and team creativity," Initial submission to *Journal of Intellectual Capital*.

Wang, Z., Zhang, H., & Cai, S. (2023). "The impact of negative performance feedback on supervisor bottom-line mentality," Initial submission to *Asia Pacific Journal of Management*.

Description: **Asia Pacific Journal of Management**

Wang, Z., Guo, X., Ren, S., Singh, S.K., & Cai, S. (2023). "How supervisor bottom-line mentality influence work connectivity behavior after-work? The role of employee high level goal setting and competitive climate," Initial submission to *Information Technology and People*.

Wang, Z., Guan, C., Ren, S., Cai, S., & Mayowa, T.B. (2023). "Challenge or hindrance? Team reflexivity and innovative behavior: The role of cognitive appraisals and empowering leadership," Revised and resubmitted to *Asia Pacific Journal of Management*.

Wang, Z., Chen, F., & Cai, S. (2023). "Can participative leadership stimulate employees' boundary-spanning behavior: The influence of belongingness and co-worker support," Initial submission to *Journal of Leadership and Organizational Studies*.

Wang, X., Pan, H., Zhu, N., & Cai, S. (2019). "East Asian films in European market: The influence of cultural specificity on box office performance," Revised and resubmitted to *International Marketing Review*.

Cai, S., Jun, M., Yang, Z., & Wang, X. (2019). "On boundary spanners and interfirm embeddedness: the moderating effect of guanxi institution in China," Revised and resubmitted to *Journal of Purchasing and Supply Management*.

Wang, Z., Cai, S., & Liu, D. (2019). "The Effects of Self-Reflection on Individual Intellectual Capital," Revised and resubmitted to *Journal of Intellectual Capital*.

Cai, S., Yang, Z., & Wang, X. (2019). "Boundary Spanner's Customer Orientation in Turbulent versus Stable Environments," Initial submission to *Industrial Marketing Management*.

Wang, Z., Liu, M., & Cai, S. (2019). "Team reflexivity and employee innovative behavior: The role of knowledge sharing and paternalistic leadership," Initial submission to *Asia Pacific Journal of Management*.

Wang, Z., Cai, S., Liu, M., & Liu, D. (2019). "Servant leadership, team reflexivity, coworker support climate and employee creativity: A multilevel perspective," Initial submission to *Asia Pacific Journal of Management*.

Cai, S. & Yang, Z. (2017). "A fuzzy set approach for developing a structured typology of competitive priorities.," Initial submission to *Journal of Business Research*.

Working Papers

Wang, Z., Zhang, H., & Cai, S. (2023). "How and when participative leadership influence employee learning."

Description: Journal: **Organization & Management**

Cai, S. & Yang, Z. (2018). "The effects of formal market institutions on interfirm relationship networks in a transitional economy: A fuzzy set analysis of guanxi in China.."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4304	Procurement and Contracting	0.5	35	Main	100%
2023/Fall	BUSI3301	Supply Chain Fundamentals	0.5	25	Main	100%
2023/Fall	BUSI2301	Introduction to Operations Management	0.5	74	Main	100%
2023/Winter	BUSI4304	Procurement and Contracting	0.5	20	Main	100%
2023/Winter	BUSI2301	Introduction to Operations Management	0.5	90	Main	100%
2022/Fall	BUSI3301	Supply Chain Fundamentals	0.5	19	Main	100%
2021/Winter	BUSI4304	Procurement and Contracting	0.5	31	Main	100%
2020/Fall	BUSI3301	Supply Chain Fundamentals	0.5	24	Main	100%
2020/Fall	BUSI2301	Introduction to Operations Management	0.5	69	Main	100%
2020/Winter	BUSI4304	Procurement and Contracting	0.5	37	Main	100%
2019/Fall	BUSI2301	Introduction to Operations Management	0.5	49	Main	100%
2019/Fall	BUSI3301	Supply Chain Fundamentals	0.5	46	Main	100%
2019/Winter	BUSI4304	Procurement and Contracting	0.5	25	Main	100%
2019/Winter	BUSI2301	Introduction to Operations Management	0.5	79	Main	100%
2018/Fall	BUSI3301	Supply Chain Fundamentals	0.5	28	Main	100%
2018/Winter	BUSI4304	Procurement and Contracting	0.5	30	Main	100%

2017/Fall	BUSI3301	Supply Chain Fundamentals	0.5	25	Main	100%
2017/Fall	BUSI2301	Introduction to Operations Management	0.06	9	Main	12%
2017/Fall	BUSI2301	Introduction to Operations Management	0.44	79	Main	88%
2017/Winter	BUSI4304	Procurement and Contracting	0.5	30	Main	100%
2016/Fall	BUSI3301	Supply Chain Fundamentals	0.5	46	Main	100%
2016/Fall	BUSI2301	Introduction to Operations Management	0.5	78	Main	100%
2016/Winter	BUSI4304	Procurement and Contracting	0.5	26	Main	100%
2015/Fall	BUSI2301	Introduction to Operations Management	0.5	84	Main	100%
2015/Fall	BUSI3301	Supply Chain Fundamentals	0.5	30	Main	100%

Service to the institution (Academic)

Faculty Assignments

PhD. Comprehensive Committees:

2023-2024: Lorraine Fraser
2023-2024: Asit Koul
2012-2013: Vedmani Sharan
2011-2012: Din Begovic

PhD. Thesis Committees:

2017-2018: Zafor Ahmed
2016-2017: Hanuv Mann
2016-2017: Inder Jit Singh Mann

University Assignments

Masters Thesis Committees:

2010-2011: Open Source Security Tools: Market Offers
2010-2011: Islam Balbaa, Department of Systems and Computer Engineering. (Master degree)

External Committees

Thesis Assignments

PhD. Thesis Committees:

2020-2021: External-City University of Hong Kong, (DBA degree)
2018-2019: Wang, Xiaoyan, City University of Hong Kong
2017-2018: Sat Chui Wan, City University of Hong Kong, (DBA degree)
2016-2017: Zou, Zhiping, City University of Hong Kong, (DBA degree)
2016-2017: Huang, Zhihua, City University of Hong Kong, (DBA degree)
2015-2016: Qi Ye, City University of Hong Kong, (DBA degree)
2013-2014: Jia Fan, City University of Hong Kong, (Ph.d degree)

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Professional Memberships

Institute for Operations Research and Management Sciences, 2010
APICS, the Association for Operations Management, 2008
Decision Sciences Institute, 2003
Production and Operations Management Society, 2003

Curriculum Vitae - Sprott School of Business

Rick Colbourne, PhD
Assistant Professor - Tenured,
Sprott School of Business (Entrepreneurship)
Telephone: 613-520-2600 x6601
Email: rick.colbourne@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0003-3416-9931>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Cambridge.
Title: *Practice, Power and Learning in UK based Recorded Music Organizations* <https://www.repository.cam.ac.uk/handle/1810/240608>
Postgraduate Certificate in Higher Education. University of Westminster.
Master of Business Administration. Simon Fraser University, Segal Graduate School of Business.
Title: *Electronic Arts: Transitioning EA Sports Online*
Bachelor of Arts. Mount Allison University.

Professional Certifications

Driving Economic Growth Through Entrepreneurship Ecosystems, 2016, Babson College, Babson Park, USA.
Price-Babson Symposium for Entrepreneurship Educators, 2015, Babson College, Babson Park, USA.

B. EMPLOYMENT

Academic Appointments

Associate Dean, Equity and Inclusion, Sprott School of Business (2020 - Present), Ottawa, Canada-Ontario.
Assistant Professor, Indigenous Leadership and Management, Sprott School of Business, Carleton University (September, 2019 - Present), Ottawa, Canada-Ontario.
Visiting Professor, Nordakademie Graduate School of Business (2019 - Present), Hamburg, Germany.
Adjunct Professor, University of Northern British Columbia (2013 - Present), Vancouver, Canada-British Columbia.
Visiting Professor, Nordakademie Graduate School of Business (2017 - 2019), Hamburg, Germany. MBA - Leadership and Action
Senior Lecturer, Segal Graduate School of Business, Beedie School of Business, Simon Fraser University (2015 - 2019), Vancouver, Canada-British Columbia.

1. Management of Technology (MOT) MBA: Leadership for the Technology Driven Enterprise
2. Graduate Certificate in Science and Technology Commercialization: Leadership Thought and Action
3. MBA: Business and Indigenous Peoples
4. EMBA: Indigenous Business and Communities
5. EMBA: Entrepreneurship

Adjunct Professor, School of Business, University of Northern British Columbia (2013 - 2019), Prince George, Canada-British Columbia.

1. MBA: International Business (Entrepreneurship)
2. MBA: Human Resource Management and Industrial Relations
3. MBA: Organizational Behaviour

Instructor, Graduate School of Business, School of Business, Capilano University (2015 - 2018), North Vancouver, Canada-British Columbia.

1. International Management Graduate Diploma/Master of Science (MSc) International Business and Management
2. North American Business Management Applied Post Baccalaureate program (NABU) - Strategy
3. CapCore - Indigenous Entrepreneurship (4th year students)

Fulbright Visiting Research Chair in Indigenous Entrepreneurship, American Indian Studies, University of Arizona (2016 - 2017), Tucson, Arizona.

Assistant Dean, Indigenous Business Education and Director Ch'nook, Sauder School of Business, University of British Columbia (2011 - 2014), Vancouver, Canada-British Columbia.

1. MBA- Business in Society: Indigenous Peoples and Business

2. Waikato Tainui College Indigenous MBA Program (New Zealand) - International Indigenous Business Module and MBA Field School (Ch'nook partnership)
3. Ch'nook Scholars Provincial Gatherings: Being an Agent for Change; Aboriginal Leadership Stories; Aboriginal Business Case Competition; Aboriginal Identity, Culture and Perspectives in Business Education
4. Ch'nook Scholars iTrek (International Business Field School): Ethiopia: Aboriginal students facilitated Entrepreneurship workshops to Ethiopians; London: Aboriginal students explored international business career opportunities.
5. Aboriginal Management Program (AMP)

Adjunct Professor, Beedie School of Business, Simon Fraser University (2008 - 2011), Vancouver, Canada-British Columbia.

1. Executive Education - Program Design: Chief Information Office (CIO) Canada Leadership Development Program and G&F Financial Motivation, Performance, Coaching and Mentoring
2. Executive Education - Learning Needs Analysis, Program Design & Facilitation: Canada General Accountants of Canada Business Leadership Program, Deloitte - Chief Human Resource Office Breakfast Learning Series, Corix Executive Leadership Development Program, Industry Council for Aboriginal Business ICAB Leadership Exchange, ICAB Dialogue Forum - Finding Partners, BC Hydro and Business Faculty Research Forum, Capgemini/TELUS/Faculty of Business - The living laboratory, Aboriginal Tourism BC Industry - Provincial Education and Training Strategy

Executive Director, Learning Strategies Group, Beedie School of Business, Simon Fraser University (2008 - 2011), Vancouver, Canada-British Columbia.

Visiting Lecturer, MA in Arts Management, School of Cultural Policy and Management, CITY University (2004 - 2006), London, United Kingdom.

1. Innovation and Technology in the Music Industry
2. Strategic Management Challenges in Classical Music Industry Firms
3. Classical Music: Live Production, Touring and Agencies

Senior Lecturer (Assistant Professor), School of Media, Arts & Design, University of Westminster (2002 - 2006), London, United Kingdom.

1. MA Music Business Management: Leadership and Organizational Management, Innovation and Technology Management, Research Methods, Supervisor: Music Business Management MA Thesis, Workshop: Music Careers
2. BA Commercial Music: Commercial Music Business Essentials

Director, MA Music Business Management, School of Media, Arts & Design, University of Westminster (2002 - 2006), London, United Kingdom.

C. PROFESSIONAL HONOURS

2023 – 2024: Honorary Fellow Dilin Duwa, Centre for Indigenous Business Leadership, University of Melbourne.

2023: Associate Research Fellow, Cambridge Centre for Social Innovation.

2021 – 2022: Honorary Fellow Dilin Duwa, Centre for Indigenous Business Leadership, University of Melbourne.

2019: Segal Graduate School of Business Teaching Honour Roll, Simon Fraser University.

2016: Fulbright Visiting Research Chair, Foundation for Educational Exchange between Canada and the United States of America (Fulbright Canada). Fulbright Visiting Research Chair in Indigenous Entrepreneurship (University of Arizona). Fulbright Canada Research Fellowship (\$50,000 US).

2015: University Achievement Award for Teaching, University of Northern British Columbia.

2014: Deputy Minister's Recognition Award for Collaboration and Partnership, Government of Canada, Aboriginal Affairs and Northern Development.

2012: Recognition of Excellence - Ch'nook Initiative, Aboriginal Affairs and Northern Development Canada.

2012: Recognition of Excellence - Ch'nook Initiative, Paul Marting Aboriginal Education Initiative.

2009: Excellence in Learning - Learning Strategies Group, Canadian Council for Learning.

2006: Teaching and Learning Fellowship, University of Westminster. Funding amount: \$11,000 CAD.

2004: London Technology Network Fellowship, London Technology Network. Funding Amount: \$22,000 CAD.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		4		4
Articles-in-Progress (All)		10		10
Publications in Conference Proceedings (Refereed)		4		4
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings		6		6
Paper Presentations (Refereed)		8		8

Research Report, Non-Refereed		2		2
Grants - Funded (both refereed and non-refereed)		28		28
Other Research, Non-refereed		3		3
Totals		65		65

Refereed Scholarly Publications

Articles in Refereed Journals

- Colbourne, R., Ejaz, L., Grinevich, V., Husain, S., & O'Farrell, D.A. (2024). Hybrid entrepreneurship in just transitions: Dealing with dilemmas facing 'the other'. *Environmental Innovation and Societal Transitions*, 53. [B]
- Colbourne, R. (2024). Guest editorial: Chasing truth and (Re)Conciliation: navigating contexts, tensions and consequences. *Equality, Diversity and Inclusion*, 43 (6), 1001-1006. [B]
- Colbourne, R., Henriques, I., Peredo, A. M., Anderson, R., & Wanuch, R. (2024). Transforming Indigenous Procurement: Empowerment, Challenges, and the Road Ahead. *Journal of Aboriginal Economic Development*, 14 (1), 2-15. [C]
- Colbourne, R., & Parhankangas, A. (2023). Indigenous Entrepreneurship and Venture Creation: A Typology of Indigenous Crowdfunding Campaigns. *Entrepreneurship, Theory and Practice*, 47 (5), 1617-1659. [A+]
Article first published online: June 14, 2022
Volume assigned in 2023, changed date
- Colbourne, R., Peredo, A., & Henriques, I. (2023). Indigenous Entrepreneurship? Setting the Record Straight. *Business History*. [A]
DOI only, online version
- Peredo, A., Abdelnour, S., Adler, P., Banerjee, B., Bapuji, H., Marta Calas, Ekaterina Chertkovskaja, Rick Colbourne, Alessia Continu, Michelle Evans, Paul Hirsch, Arturo Osorio, Banu Ozkazanc-Pan, Linda Smircich, Gabriel Weber (2022). We Are Boiling: Management Scholars Speaking Out on COVID-19 and Social Justice. *Journal of Management Inquiry*, 31 (4), 339-357. [A]
Article first published online: May 31, 2022

Volume assigned in 2022 (GS 2023)
- Colbourne, R., Moroz, P., Hall, C., Lendsay, K., & Anderson, R. B. (2020). Indigenous works and two eyed seeing: mapping the case for indigenous-led research. *Qualitative Research in Organizations and Management*, 15 (1), 68-86. [B]
Publication date: 13 December 2019
July 2021: Pub change publication year to 2020.
- Colbourne, R. (2017). An Understanding of Native American Entrepreneurship. *Small Enterprise Research*, 24 (1), 49-61. [C]
- Colbourne, R. (2012). Ch'nook Indigenous Business Education Initiative. *Journal of Aboriginal Economic Development*, 8 (1), 73-80. [C]

Articles in Refereed Conference Proceedings

Full Paper

- Colbourne, R., Hoffmann, T., Lendsay, K., & Hall, C. (2022). What Indigenous Community Corporate Partnerships have to teach Researchers: A Model for Equitable Research Engagements. *Development Studies Association Conference*.
- Colbourne, R., Bratton, V., Black, L., Lahnenman, B., Peredo, A.M., Greer, D, & Rosalie, GA (2021). Indigenous Entrepreneurship: Honoring Relationships at the Heart of Business. *Western Academy of Management*.
- Colbourne, R., Doucette, M., Peredo, A., & Schneider, B. (2020). Broadening our Sight: Learning and Honouring Indigenous Worldviews. *Academy of Management (AOM)*.
Vancouver, Canada.
- Colbourne, R. (2020). Broadening our Sight (Site): Indigenous Economic Development and Socioeconomic Well-being. *Academy of Management (AOM)*.
Symposium organizer and paper [Online] Vancouver, Canada.
- Holan, P. M., Colbourne, R., Ometto, M. P., Heilbrunn, S., Willi, A., Fernandez, P.D. (2018). Entrepreneurship of Poverty: Poverty of Entrepreneurship - Entrepreneurship under Severe Constraint. *Academy of Management (AOM)*, Chicago, US:.
- Banerjee, B., Colbourne, R., Dana, L. P., Doucette, M. E., Gladstone, J. S., Newenham-Kahidi, A.H. & Peredo, A. M. (2018). Decolonizing Development: Perspectives from Indigenous Communities. *Academy of Management (AOM)*, Chicago, US:.
- Evans, M., Colbourne, R., Henry, E. Y., Mainprize, B., Stewart, D., Williamson, I.O. (2015). Indigenous Management Education and the Management Academy. *Academy of Management (AOM)*, Vancouver, British Columbia:.
- Colbourne, R., Anderson, R. B., & Lin, H. (2015). Indigenous People and the Entrepreneurship Ecosystem. *Annual Conference of Academy of Innovation and Entrepreneurship*, Toronto, Ontario:.

Edited Books

Colbourne, R., & Anderson, R. (Ed.). (2020). *Indigenous Wellbeing and Enterprise: Self-Determination and Sustainable Economic Development*. Abington, United Kingdom: Routledge.

Chapters in Edited Books

Colbourne, R. (2021). Indigenous Entrepreneurship. In T.M Cooney (Ed.), *The Palgrave Handbook on Minority Entrepreneurship*. Abington, United Kingdom: Routledge. [Status: Published]

Mika, J., Colbourne, R., & Almeida, S. (2020). Responsible Management: An Indigenous Perspective. In Laasch, O., Suddaby, R., Freeman, E. & Jamali, D (Eds.), *The Research Handbook of Responsible Management* (pp. 260–276). Cheltenham, United Kingdom: Edward Elgar. [Status: Published]

Colbourne, R., & Anderson, R. (2020). Introduction. In Colbourne, R. & Anderson, R. (Eds.), *Indigenous Self-Determination and Sustainable Economic Development*. Abington, United Kingdom: Routledge. [Status: Published]

Henriques, I., Colbourne, R., Peredo, A., & Anderson, R. (2020). Relational and social aspects of Indigenous entrepreneurship: the Hupacasath case. In Colbourne, R. & Anderson, R. (Eds.), *Indigenous Self-Determination and Sustainable Economic Development*. Abington, United Kingdom: Routledge. [Status: Published]

Colbourne, R., & Anderson, R. (2019). Economic Wellbeing of the Indigenous People in the Asia Pacific Region: The Role of Entrepreneurship in Sustainable Development. In Fleming, C. & Manning, M. (Eds.), *Routledge Handbook of Indigenous Wellbeing*. UK: Routledge. [Status: Published]

Colbourne, R. (2017). Indigenous Entrepreneurship and Hybrid Ventures. In Andrew C. Corbett & Jerome A. Katz (Eds.), *Hybrid Ventures (Advances in Entrepreneurship, Firm Emergence and Growth, Volume 19)* (pp. 93-149). United Kingdom: Emerald Publishing Limited. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Scholarly Publications

2021: Colbourne, R., *Shared Journeys: The ICAB Leadership Exchange*. producer

2021: Colbourne, R., Anderson, R., Henriques, I., Peredo, A., & Schneider, B. *Indigenous Economic Development*. Oxford Bibliographies

2020: Colbourne, R., *Documentary: Reclaiming Rights and Voice: The Legacies of Indigenous Resurgence in Canada*. producer - in production

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Special Issue of a PRJ

2022 – 2023: EDI Journal (International).

Presentations

Papers Presented at Conferences

Refereed

Hoffmann, T., Colbourne, R., Lendsay, K., & Hall, C. (2022). *What Indigenous Community Corporate Partnerships have to teach Researchers: A Model for Equitable Research Engagements*. Development Studies Association Conference, London, United Kingdom.

Oloruntoba, S. & Colbourne, R. (2022). *Africa Indigenous Youth Entrepreneurship Roundtable*. African Studies Association Annual Meeting, Philadelphia, United States of America.

Olorutoba, S. & Colbourne, R. (2022). *Workshop on Indigenous Communities, Knowledge and Youth Perspectives on Career, Employment and Entrepreneurship in Africa*. African Knowledge, Natural Resource Governance and Innovation Week, Pretoria, South Africa.

Colbourne, R., Bratton, V., Black, L., Lahnehan, B., Peredo, A. M., Greer, D. & Rosalie, GA. (2021). *Indigenous Entrepreneurship: Honoring Relationships at the Heart of Business*. Western Academy of Management, Virtual, Virtual.

Colbourne, R. & Parhankanga, A. (2020). *Raising Money for Emancipation and Decolonization: The Role of Commercial, Cultural, Community and Activist Crowdfunding Campaigns*. New School for Social Research Management and Social Justice Conference, New York, New York.

Parhankangas, A. & Colbourne, R. (2020). *Raising Money for Emancipation and Decolonization: The Role of Commercial, Cultural, Community and Activist Crowdfunding Campaigns*. Sustainability, Ethics and Entrepreneurship Society, San Juan, Puerto Rico.

Deephouse, D., Doucette, MB., Colbourne, R., & Carter, T. (2020). *Indigenizing and Decolonizing Business Schools 2020: Administrative Leadership, Curricular Development, and Research Opportunities*. Administrative Sciences Association of Canada, Virtual, Virtual.

Henriques, I., Colbourne, R., Anderson, R., Peredo, A. M., & Schneider, B. (2019). *Encouraging Indigenous Social Entrepreneurs*. International Association for Business and Society, San Diego, California.

Colbourne, R. (2018). *Indigenous Peoples and the Economy: A Force for Decolonization or Recolonization?* Academy of Management (AOM), Chicago, Illinois.

Colbourne, R. (2018). *Decolonizing Development: Perspectives from Indigenous Communities*. Academy of Management (AOM), Chicago, Illinois.

Colbourne, R. (2018). *The Native, Aboriginal and Indigenous People's Caucus - Improving the Lives of Indigenous Peoples*. Academy of Management (AOM), Chicago, Illinois.

Colbourne, R. (2018). *What is Indigenous entrepreneurship?* Global Conference on Indigenizing Entrepreneurship, Ottawa, Canada-Ontario.

Description: Compelling stories and key insights that provided attendees with a background in current work on the goals, values and

practices informing Indigenous entrepreneurship

Colbourne, R. (2018). *TRC Legacy Categories: Education, Entrepreneurship and Socioeconomic Capacity Building*. Reconciliation Forum, Victoria, Canada-British Columbia.

Colbourne, R. (2018). *Indigenous Self-Determination and Sustainable Economic Development*. Indigenous Research Symposium, Toronto, Canada-Ontario.

Description: Symposium presentation outlining current research focused on Indigenous entrepreneurship, hybrid venture creation, entrepreneurship ecosystems as well as the edited book project: Indigenous Self-Determination and Sustainable Economic Development

Colbourne, R. (2017). *Indigenizing the Academy*. Year of Indigenous Action, Mount Allison University, Sackville, Canada-New Brunswick.

Colbourne, R. (2017). *Decolonizing Indigenous Entrepreneurship: Hybrid Ventures and Entrepreneurship Ecosystems*. ConocoPhillips IRIS Seminar Series, University of Calgary, Calgary, Canada-Alberta.

Colbourne, R. (2017). *How Risk-Taking Lead to Career Success*. Playing it Unsafe, Mount Allison University, Sackville, Canada-New Brunswick.

Description: Keynote

Colbourne, R. (2016). *Entrepreneurship of Poverty: Poverty of Entrepreneurship - Entrepreneurship under Severe Constraint*. Academy of Management (AOM), Chicago, Illinois.

Colbourne, R. (2015). *Indigenous Management Education and the Management Academy*. Academy of Management (AOM), Vancouver, Canada-British Columbia.

Colbourne, R. (2015). *Exploring Learning Experiences, Methods and Developmental Paths for 21st Century Leadership*. Future Leaders Framework Initiative, Banff, Canada-Alberta.

Colbourne, R. (2015). *Understanding Indigenous Entrepreneurship*. Annual Conference of the Academy of Innovation and Entrepreneurship, Toronto, Canada-Ontario.

Description: Conference panel presentation on understanding Indigenous entrepreneurship in context of a sustainable innovation ecosystem and the impact of diversity on entrepreneurial development and social innovation

Colbourne, R. (2013). *The Role of Responsibility in Management Education and Indigenous Business Education*. Towards New Horizons - Responsible Management Education Conference PRME, Hamilton, New Zealand.

Description: PMRE Secretariat - 3rd PRME Australia/New Zealand Forum, Waikato Management School, Waikato-Tainui College for Research

Other Presentations

Invited Lecture

2021: Schulich Business Excellence Academy, Toronto, Canada-Ontario. 110 Black and Indigenous high school students

2021: HSBC Social Innovation Academy Workshop, Virtual, Virtual. Ethics and Community Engagement, HSBC Social Innovation Academy Workshop, Vancouver, Canada, [online]

Keynote Address

2016: Assembly of First Nations Annual General Meeting, Victoria, Canada-British Columbia. Focus: Indigenous Entrepreneurship Ecosystems

2012: Wise Practices in Indigenous Community Development, Banff Centre for Leadership, Banff, Canada-Alberta. Focus: How can education mediate the success of Indigenous leaders, managers and administrators in community development and business opportunities?

Presentation

2023: Global Participants, Virtual, Virtual. Colbourne, R., O'Farrell, D. (2023). Using ChatGPT for Charitable Organizations, Global Participants, Ottawa, Canada [online]

2023: Sprott School of Business, Ottawa, Canada-Ontario. Workshop: PhD Writing Session

2023: Cando 29th Annual National Conference & AGM, Membertou, Canada-Nova Scotia. Colbourne, R., Henriques, I., Aubin, D., & Dymond, T (2023). Breakout Session #1 – Transforming Indigenous Procurement – Results from the 2023 Cando Survey on Indigenous Procurement and Capacity Needs and Introductions to Government Support, Cando 29th Annual National Conference & AGM - "Transforming Economic Development in Changing Times", Membertou, Canada

2022: Symposium on Indigenous Socioeconomic Development, Québec City, Canada-Quebec. Colbourne, R., Henriques, I., Moroz, P., Peredo, A.M., & Anderson, R. (2022). Supporting Indigenous Leadership and Enterprise, Colloque 2022 sur le développement socioéconomique autochtone | 2022 Symposium on Indigenous Socioeconomic Development, Laval University, Québec City, Canada.

2022: Business Schools Association of Canada, Calgary, Canada-Alberta. Brown, D. & Colbourne, R. (2022). Business Schools Association of Canada Annual General Meeting, Business Schools Association of Canada (BSAC | AEGC), Haskayne School of Business, University of Calgary, Calgary, Canada.

2022: Centre for Ocean Ventures & Entrepreneurship, Halifax, Canada-Nova Scotia. Colbourne, R., Pham, A.M., DiGiosia, D. & Morton, K. (2022). Equity, Diversity and Inclusion Panel, 3rd National Forum on Workforce Development, Centre for Ocean Ventures & Entrepreneurship (COVE), Halifax, Canada.

2021: EURAM 2021 Doctoral Colloquium Workshop, Online, Virtual. Community-based Participatory Action Research

2021: Business Schools Association of Canada. Brown, D., & Colbourne, R., Promoting Equity, Diversity, Inclusion and Belonging in Canadian Business Schools, Business Schools Association of Canada (BSAC), [online], Canada.

2021: Canadian Council for Small Business & Entrepreneurship. Colbourne, R, Leach, E., & Anderson, R., Building Inclusive Innovation Agendas: Engagement levels of Indigenous and non-Indigenous students in higher education research programs, Canadian Council for Small Business & Entrepreneurship (CCSBE 2021), [online], Halifax Canada.

2021: Milano School of Policy, Management, and Environment. Colbourne, R., Hart, M., Goosby Smith, J., & White, R., Management and Social Justice Conversation Series: Moving Beyond Pedagogy and Rhetoric: Re-envisioning Higher Ed Institutions As Contexts of Inclusion, Equity and Justice, Milano School of Policy, Management, and Environment, The New School, [online], New York, United States

2021: Asper Research Conference on Indigenous Business. Colbourne, R., Emerging Themes in Indigenous Business, Asper Research Conference on Indigenous Business, [online], University of Manitoba, Winnipeg, Canada.

2020: Shifting Landscapes: Indigenous Economic Development and Covid-19, Ottawa, Canada-Ontario. Sprott School of Business, Ottawa, Ontario, Canada [online].

2020: Ian O. Ihnatowycz Institute for Leadership, Ivey Business School, London, Canada-Ontario. Equity and Inclusive Communities: The First 50 Days [online].

2020: Centre for Inclusive and Sustainable Entrepreneurship and Innovation, Southampton, United Kingdom. Indigenous Entrepreneurship and Hybrid Venture Creation, Centre for Inclusive and Sustainable Entrepreneurship and Innovation (CISEI), Southampton Business School, University of Southampton, Southampton, United Kingdom [online].

2020: MaRS Impact Week, Toronto, Canada-Ontario. Inclusive Social Innovation in Canada, MaRS Impact Week, HSBC Social Innovation Academy, Toronto, Ontario, Canada [online].

2020: Business Schools Association of Canada, Fredericton, Canada-New Brunswick. Creating a Safe Space for Dialogue on Fostering Indigenous Participation

2019: Indigenous Works MITACS, Vancouver, Canada-British Columbia. Growing Research Collaborations with the Indigenous Business Community, Plenary Discussion, Sharing Perspectives on Conversations, Vancouver. Focus: facilitating Indigenous-led innovation and research

2019: Indigenous Works MITACS, Wakefield, Canada-Quebec. Growing Research Collaborations with the Indigenous Business Community, Plenary Discussion, Sharing Perspectives on the Conversations and Perspectives. Focus: facilitating Indigenous-led innovation and research

2019: Inclusion Works, Fredericton, Canada-Nova Scotia. Inclusion Works 2019, Indigenous Works Transforming the Indigenous Economy: Innovation, Talent and Partnerships, Innovation, Industry Relations and Indigenous Businesses. Focus: facilitating Indigenous-led innovation and research

2019: Community Enterprise Initiatives, Cambridge, United Kingdom. Hidden Connections: A knowledge exchange workshop exploring challenges and opportunities for heritage research and industry, Cambridge, UK. Community Enterprise Initiatives. The University of Cambridge, Cambridge Heritage Research Centre, Cambridge Judge Business School

2013: Aboriginal Mawi'omi - Investing in Aboriginal Canada National Forum on Aboriginal Education, Ottawa, Canada-Ontario. The Commons Institute

2013: Links to learning for Economic Development Officers and Land Managers Conference. First Nations Economics Success, Steering Committee - Co-lead on conference design and planning (ICAB, AANDC, CANDO, NALMA, AFOA)

2012: Special Forum on University Sector Council Partnerships: Leading Practices, Alliance for Sector Councils, Ottawa, Canada-Ontario. Presentation: From Lessons Learned to Next Steps in Partnership Development Presentation: Brainstorming Strategies and Approaches for Moving Forward

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 5 of 5]: Colbourne, R. Insight (\$2,000.00), Principal Investigator, York University. [Status: Funded]

2024 [Year 4 of 4]: Colbourne, R. Insight (\$42,721.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2024 [Year 3 of 3]: Colbourne, R. Special Grant (\$24,987.00), Principal Investigator, Spencer Foundation. [Status: Funded]

2023 [Year 4 of 5]: Colbourne, R. Insight (\$2,000.00), Principal Investigator, York University. [Status: Funded]

2023 [Year 3 of 4]: Colbourne, R. Insight (\$42,721.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 3 of 3]: Colbourne, R. & Brown, D., Partnership Development Grant (\$23,216.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 3 of 3]: Colbourne, R. Partnership Development Grant (\$58,633.00 of a total grant amount of \$58,663.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 3 of 3]: Colbourne, R. Partnership Development Grant (\$33,370.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2023 [Year 3 of 3]: Colbourne, R. Partnership Development Grant (\$23,216.00), Principal Investigator, Indigenous Works. [Status: Funded]

2023 [Year 3 of 3]: Colbourne, R. Special Grant (\$24,986.00 Not Funded of a total grant amount of \$24,986.00), Principal Investigator, Spencer Foundation. [Status: Not Funded]

2023 [Year 2 of 3]: Colbourne, R. Special Grant (\$24,987.00), Principal Investigator, Spencer Foundation. [Status: Funded]

2022 [Year 3 of 5]: Colbourne, R. Insight (\$2,000.00), Principal Investigator, York University. [Status: Funded]

2022 [Year 2 of 4]: Colbourne, R. Insight (\$42,721.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 2 of 3]: Colbourne, R. Partnership Development Grant (\$61,663.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 2 of 3]: Colbourne, R. & Brown, D., Partnership Development Grant (\$23,216.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 2 of 2]: Colbourne, R. New Frontiers in Research Fund-Transformation (\$98,375.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 2 of 3]: Colbourne, R. Partnership Development Grant (\$58,633.00 of a total grant amount of \$58,663.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 2 of 3]: Colbourne, R. Partnership Development Grant (\$33,370.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2022 [Year 2 of 3]: Colbourne, R. Partnership Development Grant (\$23,216.00), Principal Investigator, Indigenous Works. [Status: Funded]

2022 [Year 2 of 3]: Colbourne, R. Special Grant (\$24,986.00 Not Funded of a total grant amount of \$24,986.00), Principal Investigator, Spencer Foundation. [Status: Not Funded]

2022 [Year 2 of 2]: Colbourne, R. International Research Seed Grant (\$4,998.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2022 [Year 1 of 3]: Colbourne, R. Special Grant (\$24,987.00), Principal Investigator, Spencer Foundation. [Status: Funded]

2022: Colbourne, R. Youth Employment and Skills Strategy Program (\$8,111,819.00 Not Funded), Principal Investigator, Employment and Social Development Canada. [Status: Not Funded]

2022: Colbourne, R. Multidisciplinary Research Catalyst Fund (\$40,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021 [Year 2 of 5]: Colbourne, R. Insight (\$2,000.00), Principal Investigator, York University. [Status: Funded]

2021 [Year 1 of 4]: Colbourne, R. Insight (\$42,721.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 1 of 3]: Colbourne, R. Partnership Development Grant (\$61,663.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 1 of 3]: Colbourne, R. & Brown, D., Partnership Development Grant (\$23,216.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 1 of 2]: Colbourne, R. New Frontiers in Research Fund-Transformation (\$98,375.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021: Colbourne, R. CU COVID-19 Rapid Research Response Grants (\$7,090.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Colbourne, R. COVID-19 Rapid Research Fund (\$116,640.00 Not Funded), Principal Investigator, Ontario Ministry of Colleges and Universities. [Status: Not Funded]

2021: Colbourne, R. Development Grants - SSHRC Explore (\$9,384.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021 [Year 1 of 3]: Colbourne, R. Partnership Development Grant (\$58,633.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 1 of 3]: Colbourne, R. Partnership Development Grant (\$33,370.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021 [Year 1 of 3]: Colbourne, R. Partnership Development Grant (\$23,216.00), Principal Investigator, Indigenous Works. [Status: Funded]

2021: Colbourne, R. Insight Grant (\$193,285.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021: Colbourne, R. Partnership Engage Grant (\$24,627.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 1 of 3]: Colbourne, R. Special Grant (\$24,986.00 Not Funded), Principal Investigator, Spencer Foundation. [Status: Not Funded]

2021: Colbourne, R. Contract (\$8,333.00), Principal Investigator, BC Housing. [Status: Funded]

2021 [Year 1 of 2]: Colbourne, R. International Research Seed Grant (\$4,998.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021 [Year 1 of 2]: Colbourne, R. Partnership Engage Grant, Principal Investigator, Bingwi Neyaashi Anishinaabek. [Status: Funded]

2021: Colbourne, R. Partnership Development Grant (\$69,650.00 Not Funded), Principal Investigator, Indigenous Works. [Status: Not Funded]

2021: Colbourne, R. Partnership Development Grant (\$100,112.00 Not Funded), Principal Investigator, PRI-Carleton University. [Status: Not Funded]

2020: Colbourne, R. Start-up Funds (\$10,000.00), Principal Investigator, Carleton University, Vice-President (Rsch & Int'l). [Status: Funded]

2020 [Year 1 of 5]: Colbourne, R. Insight (\$2,000.00), Principal Investigator, York University. [Status: Funded]

2019: Colbourne, R. Fulbright Community Leaders (\$8,000.00), Principal Investigator, Fulbright Canada. Indigenous Ways of Knowing and Business Studies. [Status: Funded]

2019: Colbourne, R. Start-up Grant (\$10,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

Other Professional Activities

Consulting Experience

2020: BC Indigenous Housing Shortfall Report

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2021: Indigenous Studies Discussion Group, University of Cambridge. Accomplice, Ally, or Appropriator?: Exploring Boundaries of Indigenous Scholarship, Indigenous Studies Discussion Group, University of Cambridge, Cambridge, United Kingdom [online] with Clifford Atleo (Simon Fraser University), Constance Khupe (University of Witwatersrand), and Gabriela Ramos (University of Cambridge).

Academic Conference: Panelist

2023: The International Academy of Research in Indigenous Management and Organizational Studies, Ottawa University. Colbourne, R., Lendsay, K., Morrison, D., Macedo, P., Dancause, G., Hall, C., & Boissoneau, D. (2023). *Indigenous Leaders Panel: Enhancing academic research impact through engagement with Indigenous communities and organizations*

2020: Decolonizing the Business School: Panel Discussion and Workshop, London, United Kingdom. ETHOS: The Centre for Responsible Enterprise at City, University of London, [Online]

2019: DMZ - Ryerson University, Toronto, Canada-Ontario. Supporting Indigenous Entrepreneurship: A Roundtable Discussion, PayPal, The DMZ, Ryerson University, Toronto, Ontario, Canada

Board Member: Advisory Board

2020 – 2023: Carleton Dominion Chalmers Centre.

2016 – 2023: Royal Roads University, Victoria, Canada-British Columbia.

2021 – 2022: OSC Two-eyed Seeing Project, St. John's, Canada-New Brunswick.

2019 – 2022: National Indigenous Economic Development Board, Ottawa, Canada-Ontario.

2019 – 2022: Indigenous Advisory Board, Conference Board of Canada.

2020 – 2021: Social Innovation Academy, University of British Columbia.

Chair: Conference / Track / Program

2023: The International Academy of Research in Indigenous Management and Organizational Studies, Ottawa University. Papers Session III: Indigenous Self-determination and Resilience

Invited Lecture

2021: Schulich Business Excellence Academy, Toronto, Canada-Ontario. 110 Black and Indigenous high school students

2021: HSBC Social Innovation Academy Workshop, Virtual, Virtual. Ethics and Community Engagement, HSBC Social Innovation Academy Workshop, Vancouver, Canada, [online]

Keynote Address

2016: Assembly of First Nations Annual General Meeting, Victoria, Canada-British Columbia. Focus: Indigenous Entrepreneurship Ecosystems

2012: Wise Practices in Indigenous Community Development, Banff Centre for Leadership, Banff, Canada-Alberta. Focus: How can education mediate the success of Indigenous leaders, managers and administrators in community development and business opportunities?

Member: Committee/Task Force

2023: The International Academy of Research in Indigenous Management and Organizational Studies, Ottawa University, Membertou, Canada-Nova Scotia. Organizing Committee

Other Professional Service Activities

2023: Social Sciences and Humanities Research Council (SSHRC). Insight Grant reviewer

2023: Social Sciences and Humanities Research Council (SSHRC), Ottawa, Canada-Ontario. New Frontiers in Research Fund Exploration Grant (NFRFE) Review Committee, Ottawa, Canada.

2023: Social Sciences and Humanities Research Council (SSHRC), Ottawa, Canada-Ontario. CRC2 Research Chair Reviewer

2019 – 2023: Luminary Initiative, Indigenous Works, Saskatoon, Canada-Saskatchewan.

2022: African Knowledge, Natural Resource Governance and Innovation Week, Pretoria, South Africa. Olorutoba, S. and Colbourne, R. (2022). Workshop on Indigenous Communities, Knowledge and Youth Perspectives on Career, Employment and Entrepreneurship in Africa, African Knowledge, Natural Resource Governance and Innovation Week, Co-organizer, University of Pretoria, South Africa

2016 – 2022: MITACS, Ottawa, Canada-Ontario. College of Reviewers, Accelerate and Elevate Proposal Reviewer

2021: Walking in Two Worlds Symposium. Walking in Two Worlds Symposium [online], Co-organizer, Carleton University, Ottawa, Canada

2020: Reclaiming Rights and Voice: The Legacies of Indigenous Resurgence in Canada, Vancouver, Canada-British Columbia. Co-organizer, Simon Fraser University

2019: Nanomaterials for Green Technologies and Nanoelectronics for Future Generation Communications and Sensing, Burnaby, Canada-British Columbia. Guest Speaker Professor Sir Mark Welland, Nanomaterials for Green Technologies and Nanoelectronics for Future Generation Communications and Sensing, Co-organizer, Beedie School of Business, Simon Fraser University

2019: Fulbright Community Leaders, Membertou, Canada-Nova Scotia. Indigenous Ways of Knowing and Business Schools Symposium, Cape Breton University

2018 – 2019: Royal Society Te Apārangi, Wellington, New Zealand. Reviewer, Averill Foundation - Marsden Fund Council

2018 – 2019: Social Sciences and Humanities Research Council (SSHRC), Ottawa, Canada-Ontario. Research Funding Proposal Reviewer. Insight Grant Funding Application Reviewer (Indigenous)

2017 – 2019: Global Conference on Indigenizing Entrepreneurship, Ottawa, Canada-Ontario. Co-organizer, Algonquin College

2012: ICAB Leadership Exchange Celebration Event, Vancouver, Canada-British Columbia. Co-organizer, Simon Fraser University

Reviewer: Ad Hoc Reviewer for a Journal

2021: Journal of Management Studies.

2020: Canadian Journal of Higher Education.

2018 – 2019: Qualitative Research in Organizations and Managing.

2018 – 2019: Journal of Enterprising.

2010 – 2019: Human Resource Management.

Reviewer: Book / Textbook

2021: Indigenous Economic Tenacity.

2020: Introduction to International Development: Approaches, Actors, Issues, and Practice. Introduction to International Development: Approaches, Actors, Issues, and Practice, 4e, edited by Paul A. Haslam, Jessica Schafer, & Pierre Beaudet: Chapter 24: Indigenous Community Economic Resilience

2014: Aboriginal Business Leadership in Canada.

Reviewer: Conference Paper

2020: Academy of Management. Critical Management and Social Issues in Management divisions

2020: Academy of Management. Critical Management and Social Issues in Management divisions

2018: International Association for Business and Society.

2013: International Association of Arts and Cultural Management. AIMAC Conference 2013

Scholarly Work in Progress

Working Papers

Hoffmann, T. & Colbourne, R. (2023). "A Leadership Model for Indigenous Community Corporate Partnership Success."

Flynn, J. & Colbourne, R. (2023). "Community-Based Palliative Care: A Critical Opportunity to Improve First Nations Healthcare Experience."

Colbourne, R. & Peredo, A. M. (2023). "Indigenous Education."

Colbourne, R. & Peredo, A. M. (2023). "Double Agency: The Dual Identity of Objects and Object-Oriented Thinking for Digitized Innovation and Design."

Colbourne, R. & Peredo, A. M. (2023). "Chasing Truth and (Re)Conciliation: Navigating Contexts, Tensions, Limits and Possibilities."

Parhankangas, A. & Colbourne, R. (2020). "Crowdfunding Emancipation and Decolonization: The Role of Commercial, Cultural, Community and Activist Campaigns."

Colbourne, R. (2020). "Colonization, Treaty Making and the History of Economic Development for First Nations."

Colbourne, R. (2020). "Indigenous Executive Education: The Industry Council for Aboriginal Business Leadership Exchange."

Colbourne, R. (2020). "Indigenous Entrepreneurship Ecosystems: An Empirical Study."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2021/Fall	BUSI5802	Business Ethics	0.25	21	Main	100%
2021/Summer	BUSI5905	Special Topics	0.5	26	Main	100%
2021/Winter	BUSI4601	Business Ethics	0.5	48	Main	100%
2021/Winter	BUSI4601	Business Ethics	0.5	46	Main	100%
2020/Fall	BUSI5906	Special Topics	0.25	17	Main	100%
2020/Fall	BUSI5802	Business Ethics	0.25	24	Main	100%
2020/Winter	BUSI4601	Business Ethics	0.5	48	Main	100%
2020/Winter	BUSI4601	Business Ethics	0.5	48	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Beedie School of Business, Simon Fraser University

School Assignments

Other Committees:

2010-2011 – 2011-2012: Dean's Priorities and Planning Committee

Carleton University

Faculty Assignments

Chair:

2022-2023: Equity, Diversity and Inclusion (EDI) Action Group

Sprott School of Business

School Assignments

Other Committees:

2021-2022: Kate Vanderby - MITACS Business Strategy Internship (BSI), Arctic Youth Network

2021-2022: D'Arcy O'Farrell - MITACS Business Strategy Internship (BSI), Arctic Youth Network

2021-2022: Jyllenna Landry – MITACS Business Strategy Internship (BSI), Arctic Youth Network

Sprott School of Business, Carleton University

School Assignments

Chair:

2020-2021: Sprott EIC Action Group

Unassigned

University Assignments

Committee Chair:

2016-2017 – 2020-2021: Duke of Edinburgh's Emerging Leaders for Sustainable Community Development

H. OTHER

Selected Media Appearances: Online

2018 - How's This for a Resume? Blazing the Path for Indigenous Entrepreneurship : Academica Group

2018 - AC set to welcome Global Conference on Indigenizing Entrepreneurship : Algonquin College News

Selected Media Appearances: Radio

2017 - Playing it unsafe : CBC Radio Information Morning, Moncton NB

Selected Media Appearances: Online

2016 - UNBC professor wins prestigious award

2016 - Capilano University prof named Fulbright scholar : North Shore News, September 6., 2016

Selected Media Appearances: Print

2013 - Ch'nook Trek: Ethiopia - A business adventure : Soar Magazine. BDC Aboriginal Banking Issue 21

Selected Media Appearances: Online

2012 - Ch'nook partners with former Prime Minister Paul Martin : Saunter School of Business, News and Events, December 2012

Selected Media Appearances: Print

2012 - Ethiopian Entrepreneurs : Trek Magazine, Fall/Winter 2012

2013 - MBA Study Tour to Canada

2012 - Ch'nook scholars share business skills with entrepreneurs in Ethiopia : Viewpointa Magazine, Saunter School of Business, Fall issue

2011 - Regional Partnership Enhances Business Career Opportunities for First Nations Students : VIU Magazine, December 2011

2010 - First Nations and Business Leaders Trade Places to Undo Stereotypes and Discover Common Ground : BC Business Magazine BC First Nations and Business May 5, 2010

2010 - Exchange Program finds Common Ground for Business and Aboriginal Leaders : Business in Vancouver, April 13-19, 2010, Issue 1068

Selected Media Appearances: Online

2020 - Sprott School of Business appoints new assistant dean to lead Indigenous programs, Ottawa Citizen

2020 - Carleton Instructors Making the Most of Shift to Online Learning, Carleton Newsroom

2020 - Rick Colbourne Appointed Inaugural Assistant Dean, Equity and Inclusive Communities at Carleton's Sprott School of Business, Carleton University Newsroom

2020 - Business for a Better World: Sprott School Launches New Strategic Plan, Carleton Newsroom

2020 - Etuaptmuk*: Business Professor Rick Colbourne Investigates the Economic Impact of the Pandemic on Indigenous Communities, Raven Magazine

2021 - Windspeaker.com: Bursary for Indigenous students in business established at Carleton U

2021 - University of Cambridge Newsroom: Self-Determination

2021 - Carleton Newsroom: Black Entrepreneurship Knowledge Hub Research to Support Enterprises and Communities

2021 - Corporate Knights: Business schools launch 'overdue' efforts to Indigenize curricula

2021 - Carleton Newsroom: Carleton University Research Review 2021

2021 - Yahoo! Finance: New Lightspeed study sheds light on impact of COVID-19 on LGBTQ+ businesses in North America

2021 - Indigenous Business and Finance Today: Carleton Alumnus Establishes Generous Bursary for Indigenous Students in Business

Credentials

Professional Memberships

European Academy of Management (EURAM), 2020-2021

Administrative Sciences Association of Canada (ASAC), 2019 - Present

Aboriginal Professional Association of Canada (APAC), 2016 - Present

British Academy of Management (BAM), 2008-2011

British Columbia Human Resources Association (BCHRNA), 2008-2011

European Group on Organisation Studies (EGOS), 2008-2011

American Academy of Management, 2007 - Present

Professional Development

Other Professional Development

2024: ICD-Rotman Directors Education Program (DEP).

2016: Driving Economic Growth Through Entrepreneurship Ecosystems.

2015: Price-Babson Symposium for Entrepreneurship Educators.

Professional Seminars / Workshops

2023: The Experiential Classroom: Teaching Entrepreneurship.

Research Reports

2021: Brown, D., Summerlee, A., & Colbourne, R., COVID-19 Impacts on LGBTQ2S+ Business Pilot Study., submitted to Canadian Gay and Lesbian Chamber of Commerce (CGLCC), Ottawa, Canada.

2021: Colbourne, R., Pomeroy, S., & Landry, J., BC Indigenous Housing Shortfall Report., submitted to BC Housing, Vancouver, Canada.

2008: Colbourne, R., Aboriginal Tourism BC Provincial Education and Training Strategy Report., submitted to Aboriginal Tourism British Columbia.

Service to the Community**Member of a Committee**

2013 – 2016: Advisory Board, Canadian Institute of Diversity and Inclusion

2012 – 2014: Advisory Board, BC Achievement Foundation: BC Aboriginal Business Awards

Other Community Service Activities

2013: Indigenous Economic Development: Australia's Governor-General Quentin Bryce, Focus: Discussion of common issues, challenges and successes related to Indigenous economic development in Canada and Australia

2013: Douglas R. Eyford, Forging Partnerships, Building Relationships West Coast Energy Infrastructure, Represented colleges and universities in British Columbia in discussion of current situation and ongoing issues and challenges related to Aboriginal education, skills and capacity development in context of west coast energy initiatives.

Positions Held in Civic Organizations

2019 – 2022: Committee Member, Indigenous Affairs Policy Committee, Conference Board of Canada

2017 – 2022: Board of Directors, Halfway River Ventures, Halfway River First Nation

2013 – 2014: Special Advisor, Togo Project Vision 2020

Speech / Presentation at a Community Meeting

2012: Aboriginal Education: The Honourable Paul Martin (former Canadian Prime Minister) at First Nations Longhouse, Focus: Shared understandings of current issues, challenges and best practices related to Aboriginal business education in Canada

Curriculum Vitae - Sprott School of Business

Hayley Cooper, MAcc
Associate Professor, Teaching Stream - Tenured,
Sprott School of Business (Accounting)
Telephone:
Email: hayley.cooper@carleton.ca
AACSB Qualification: Instructional Practitioner (IP) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Master of Accounting. Carleton University.

Bachelor of Commerce. Carleton University.

Professional Certifications

Chartered Professional Accountant (CPA), 2017, Ontario, Canada.

B. EMPLOYMENT

Academic Appointments

Instructor, Sprott School of Business, Carleton University (May, 2020 - Present), Ottawa, Canada-Ontario. Recent course load:

ACCT 5129 – Professional Accounting Cases I

ACCT 5137 – Professional Accounting Cases II

ACCT 5135 – Advanced Integration II

BUSI 1004 – Introduction to Financial Accounting

BUSI 2002 – Intermediate Accounting II

- Developed extensive briefing notes on writing in the Assurance role for Day 2 of the CFE for MAcc program students
- Joined the 1st year accounting courses working group to participate in the development and redesign of BUSI 1004
- Speaker at SASA Resume and Interview workshop for co-op students
- Participated at SASA Virtual Networking Night as a faculty representative, engaging with students interested in professional recruitment and pursuing the Sprott MAcc

Contract Instructor, Sprott School of Business, Carleton University (January, 2018 - April, 2020), Ottawa, Canada-Ontario. Taught ACCT 5137 – Professional Accounting Cases II for the part-time MAcc program in the winter term for 3 years

Graduate Mentor, Master of Accounting, Accounting Department, Sprott School of Business, Carleton University (May, 2017 - 2017), Ottawa, Canada-Ontario.

- Marked and debriefed the case responses to a mock Common Final Exam (CFE) Day II type comprehensive case written by three Master of Accounting and CPA candidates on a volunteer basis
- Utilized a case marking key in combination with professional judgement to assess cases and performed debriefs with students in 45-minute one-on-one sessions

Undergraduate Teaching Assistant, Accounting Department, Sprott School of Business, Carleton University (2012 - 2014), Ottawa, Canada-Ontario.

- Instructed 4-5 weekly small group tutorials, teaching managerial and financial accounting to students (10+)
- Moderated CULearn discussion forums and proctored and marked multiple midterm and final examinations
- Held administrative teaching assistant role for a team of eight TAs as of September 2013; received, organized, and posted attendance marks and communicated necessary information for marking and special circumstances

Editor and Course Material Developer, Accounting Department, Sprott School of Business, Carleton University (June, 2012 - December, 2012), Ottawa, Canada-Ontario.

- Assistant to Professor Jacques Maurice, edited second edition of "An Introduction to Financial Accounting" textbook by Jacques Maurice and Rebecca Renfro
- Created new tutorial problem and solution sets and updated versions of pre-existing tutorials for BUSI 1004 and BUSI 1005
- Designed, created and assembled new term project for BUSI 1004, including deliverables, marking scheme, and administration details

Other Employment

Marker, Day II Comprehensive Case, CFE Marking Centre, Chartered Professional Accountants of Canada (October, 2017 - Present), Unknown, Canada.

- Marker for the the Day II comprehensive case on the Common Final Exam (CFE) in the assurance role for the offerings in years 2017 - 2020
- Utilized combination of detailed marking key and extensive professional judgement to resolve complex issues as part of executing the rigorous and fair evaluation process for accounting students
- Continuously exceeded expectations in applying judgement and marking consistency

Instructor, Accounting and Assurance, Welch LLP APEX Program (2017 - Present), Unknown, Canada.

- APEX (Accounting Practice Education for the Next Generation)
- Internal "university" within the firm which runs on structured learning curriculum designed to benefit experienced professionals, new university graduates, and co-op students
- Prepared materials and instructed entry-level staff accountants in practical application of basic accounting and taxation utilizing case-based learning

Author/Technical Reviewer, Chartered Professional Accountants of Canada (CPA Canada) (May, 2019 - 2021), Ottawa, Canada-Ontario.

- Prepared Task Based Simulations (TBS) for CPA Canada PEP program Core 1 and Assurance modules
- Reviewed TBS for CPA Canada PEP program Core 1 and Assurance modules
- Prepared multiple choice questions for the CPA Canada PEP exam bank

Manager, Audit and Assurance, Welch LLP (June, 2018 - 2020), Unknown, Canada-Ontario.

- Managed the accounting, audit and tax needs of a portfolio small and medium-sized private clients
- Managed a team of Staff Accountants as well as the engagement process from initial scheduling and planning through to client review and financial statement sign-off
- Acted as main point of contact for clients, providing consulting and services for accounting, assurance and tax needs

Senior Staff Accountant, Welch LLP (October, 2017 - June, 2018), Unknown, Canada.

- Prepared notice to reader, review, and audit engagement files and corporate and charity tax returns
- Prepared financial statements, special reports, and reviewing personal tax returns
- Emphasis on leadership, mentorship, planning and first point of contact communication with clients
- Acted as Junior Auditor in government contribution audits

Staff Accountant, Welch LLP (2013 - September, 2017), Unknown, Canada.

- Prepared notice to reader, review, and audit engagement files and personal, corporate, and charity tax returns
- Prepared financial statements, special reports, and reviewing personal tax returns
- Provided oversight of junior staff and planned and lead assurance and accounting engagements

C. PROFESSIONAL HONOURS

2015: Senate Medal for Outstanding Academic Achievement, Carleton University.

2014: Henry M. Tory Scholarship, Carleton University.

2013: Alberta Chartered Accountant's Scholarship, Carleton University.

2012: A. Davidson Dunton Scholarship, Carleton University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings			1	1
Totals			1	1

Refereed Scholarly Publications

Other (Non-refereed) Scholarly Publications

Chapters in non-refereed books

Cooper, H. (2021). Case Writing Technical & Skills Briefing Notes and Accompanying Video for MAcc Program Students. *MAcc Program, Sprott School of Business*. Sprott School of Business.

Description: Audit procedures, special reports

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations**Board of Directors: Substantial Involvement**

2020 – 2023: Canadian Film Institute. Treasurer

Member: Committee/Task Force

2020 – 2021: CPA Canada Competency Map Task Force (CMTF) Discussion Forum (DF).

Scholarly Work in Progress**F. ACADEMIC RESPONSIBILITIES (TEACHING)****Teaching Schedule**

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI1004	Financial Accounting for Business Students	0.5	59	Main	100%
2024/Winter	BUSI1004	Financial Accounting for Business Students	0.5	74	Main	100%
2024/Winter	BUSI2002	Intermediate Accounting II	0.5	40	Main	100%
2023/Summer	BUSI2002	Intermediate Accounting II	0.5	46	Main	100%
2023/Summer	ACCT5137	Professional Accounting Cases II	0.25	24	Main	100%
2023/Summer	ACCT5137	Professional Accounting Cases II	0.25	27	Main	100%
2023/Summer	ACCT5136	Advanced Integration II	0.17	5	Main	34%
2023/Summer	ACCT5136	Advanced Integration II	0.17	8	Main	33%
2023/Summer	ACCT5136	Advanced Integration II	0.17	9	Main	33%
2023/Winter	BUSI2002	Intermediate Accounting II	0.5	63	Main	100%
2023/Winter	BUSI1004	Financial Accounting for Business Students	0.5	57	Main	100%
2023/Winter	BUSI1004	Financial Accounting for Business Students	0.5	52	Main	100%
2022/Summer	BUSI2002	Intermediate Accounting II	0.5	34	Main	100%
2022/Summer	ACCT5137	Professional Accounting Cases II	0.25	20	Main	100%
2022/Summer	ACCT5137	Professional Accounting Cases II	0.25	20	Main	100%
2022/Summer	ACCT5137	Professional Accounting Cases II	0.25	26	Main	100%
2022/Summer	ACCT5137	Professional Accounting Cases II	0.25	26	Main	100%
2022/Summer	ACCT5136	Advanced Integration II	0.17	6	Main	33%
2022/Summer	ACCT5136	Advanced Integration II	0.17	7	Main	33%
2022/Summer	ACCT5136	Advanced Integration II	0.17	8	Main	33%
2022/Winter	BUSI2002	Intermediate Accounting II	0.5	62	Main	100%
2022/Winter	ACCT5137	Professional Accounting Cases II	0.25	10	Main	100%
2022/Winter	BUSI1004	Financial Accounting for Business Students	0.5	90	Main	100%
2021/Fall	BUSI2002	Intermediate Accounting II	0.5	83	Main	100%
2021/Summer	BUSI2002	Intermediate Accounting II	0.5	29	Main	100%
2021/Summer	ACCT5137	Professional Accounting Cases II	0.25	30	Main	100%
2021/Summer	ACCT5137	Professional Accounting Cases II	0.25	25	Main	100%
2021/Summer	ACCT5136	Advanced Integration II	0.17	4	Main	34%
2021/Summer	ACCT5136	Advanced Integration II	0.16	9	Main	32%
2021/Summer	ACCT5136	Advanced Integration II	0.17	9	Main	34%

2021/Winter	BUSI1004	Financial Accounting for Business Students	0.5	80	Main	100%
2021/Winter	ACCT5137	Professional Accounting Cases II	0.25	13	Main	100%
2021/Winter	BUSI2002	Intermediate Accounting II	0.5	51	Main	100%
2021/Winter	ACCT5129	Professional Accounting Cases I	0.25	14	Main	100%
2020/Summer	ACCT5137	Professional Accounting Cases II	0.25	28	Main	100%
2020/Summer	ACCT5137	Professional Accounting Cases II	0.25	27	Main	100%
2020/Summer	ACCT5135	Advanced Integration II	0.5	29	Main	100%
2020/Summer	ACCT5135	Advanced Integration II	0.5	26	Main	100%
2020/Winter	ACCT5137	Professional Accounting Cases II	0.25	20	Main	100%
2020/Winter	ACCT5137	Professional Accounting Cases II	0.25	20	Main	100%
2019/Winter	ACCT5137	Professional Accounting Cases II	0.25	8	Main	100%
2019/Winter	ACCT5137	Professional Accounting Cases II	0.25	8	Main	100%
2018/Winter	ACCT5137	Professional Accounting Cases II	0.25	10	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Sprott School of Business, Carleton University

School Assignments

Course/Program Coordination:

2021-2022 – 2022-2023: Accounting Area Course Assessments (BCom, BIB, MAcc, PBDA, etc.)

2020-2021 – 2022-2023: Course Coordinator, ACCT 5136 – Advanced Integration II

H. OTHER

Student Recruitment/Outreach Activities

2022 - Teamwork Activity Session for MAcc Part-Time Orientation

Student Experience Activities

2021 - SASA Faculty Representative

Credentials

Curriculum Vitae - Sprott School of Business

Oriane Couchoux, PhD
Assistant Professor - Preliminary - Tenure Track
Sprott School of Business (Accounting)
Telephone:
Email: oriane.couchoux@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
Orcid: <https://orcid.org/0000-0002-5149-9>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Queen's University.
Master of Science. HEC Montréal.
Bachelor of Business Administration. HEC Montréal.

Professional Certifications

Chartered Professional Accountant (CPA) and Chartered Accountant (CA), --N/A--
CPA auditor, --N/A--
Graduate Diploma in Public Accounting, 2020

B. EMPLOYMENT

Academic Appointments

Assistant Professor,, Sprott School of Business, Carleton University (2022 - Present), Ottawa, Canada-Ontario.
Team Leader, Professional Education Program, CPA Canada (2019 - Present), Toronto, Canada-Ontario.
Assistant Team Leader, Common Final Examination, CPA Canada (2019 - Present), Toronto, Canada-Ontario.
Assistant Professor, HEC Montréal (2020 - 2022), Montreal, Canada-Quebec.
Author, Professional Education Program, CPA Canada (2021), Toronto, Canada-Ontario.
Marker, Common Final Examination, CPA Canada (2018), Toronto, Canada-Ontario.
Senior financial analyst, Alimentation Couche-Tard (2014 - 2016), Laval, Canada-Quebec.
Senior associate, Campus Talent Acquisition, PwC Montreal (2014), Montreal, Canada-Quebec.
Associate and Senior associate, Audit & Assurance group, PwC Montreal (2011 - 2014), Montreal, Canada-Quebec.

C. PROFESSIONAL HONOURS

2021: Doctoral Fellowship, SSHRC.
2021: Best Paper Award, PI-GIWB-AAC Conference.
2019 – 2020: Doctoral Fellowship, SSHRC.
2019: Bertram Scholarship, Canadian Foundation for Governance Research.
2018: Norman Macintosh Memorial PhD Fellowship, Queen's University.
2018: Doctoral Fellowship, SSHRC.
2018: Graduate Dean's Doctoral Field Travel Grant, Queen's University.
2017: Senator Frank Carrel Fellowship, Queen's University.
2017: Queen's Graduate Awards, Queen's University.
2017: Doctoral Scholarship, Foundation of Quebec CPA.
2016: Graduate Entrance Tuition Award, Queen's University.
2016: DI McLeod Fellowship, Queen's University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Articles in Peer-Reviewed Journals	1	1		2
Articles-in-Progress (All)		7		7
Paper Presentations (Refereed)		6		6
Paper Presentations (Non-Refereed)		1		1
Research Report, Non-Refereed		1		1
Grants - Funded (both refereed and non-refereed)		6		6
Totals	1	22		23

Refereed Scholarly Publications

Articles in Refereed Journals

Couchoux, O. (2023). Navigating knowledge and ignorance in the boardroom: A study of audit committee members' oversight styles. *Contemporary Accounting Research*, 41 (1), 459-97. [A+,FT50]

Accepted for publication, use DOI.

Couchoux, O., & Malsch, B. (2022). How Firms' Quality Experts Shape Canadian Public Accountability Board Inspections and Their Outcomes: An Analysis of Intraprofessional Conflicts, Third-Party Influences, and Relational Strategies. *Contemporary Accounting Research*, 39 (2), 757-88. [A+,FT50]

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Couchoux, O. & Daoust, L. (2023). *Becoming an audit professional through the turmoil: The experience of staff auditors during periods of organizational, technological, and regulatory disruptions*. Canadian Academic Accounting Association Annual Conference, Quebec City, Canada-Ontario.

Couchoux, O., Daoust, L., & Malsch, B. (2021). *Auditing at the margins of the audit society: Lessons from Indigenous engagements in Northern Canada*. American Accounting Association, Virtual, Virtual.

Couchoux, O. (2021). *Audit committee members' style of oversight: Juggling expertise and complexity*. American Accounting Association, Virtual, Virtual.

Couchoux, O. & Guénin, H. (2021). *Becoming and being an audit partner in the age of independent regulation*. Interdisciplinary Perspectives on Accounting Conference, Virtual, Virtual.

Couchoux, O. (2021). *Audit committee members' style of oversight: Juggling expertise and complexity*. Contemporary Accounting Research, Virtual, Virtual.

Couchoux, O. (2020). *Audit committee members' style of oversight: Juggling expertise and complexity*. Critical Perspectives on Accounting, Virtual, Virtual.

Couchoux, O. & Malsch, B. (2018). *Auditors' strategic and conflicting responses to CPAB inspections*. Alternative Accounts Conference, Montreal, Canada-Quebec.

Couchoux, O. & Malsch, B. (2018). *Auditors' strategic and conflicting responses to CPAB inspections*. Interdisciplinary Perspectives on Accounting, Edinburgh, United Kingdom.

Couchoux, O. & Malsch, B. (2018). *Auditors' strategic and conflicting responses to CPAB inspections*. Public Interest Accounting Group, Toronto, Canada-Ontario.

Non-Refereed

Couchoux, O. & Daoust, L. (2023). *Turbulent times for big 4 firms: the disruption of the audit heterotopia*. Qualitative Accounting Research in American Journals, Virtual, Virtual.

Description: EIASM Discussion Forum - online

Other Presentations

Presentation

2022: Sprott Research Seminar, Ottawa, Canada-Ontario. Becoming an audit professional through the turmoil: The experience of staff auditors during periods of organizational, technological, and regulatory disruptions

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 4 of 4]: Couchoux, O. Insight Development Grant (\$7,492.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Awarded prior to hiring. [Status: Funded]

2024 [Year 4 of 4]: Couchoux, O. Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Awarded prior to hiring. [Status: Funded]

2023 [Year 3 of 4]: Couchoux, O. Insight Development Grant (\$7,492.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Awarded prior to hiring. [Status: Funded]

2023 [Year 3 of 4]: Couchoux, O. Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Awarded prior to hiring. [Status: Funded]

2022 [Year 2 of 4]: Couchoux, O. Insight Development Grant (\$7,492.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Awarded prior to hiring. [Status: Funded]

2022 [Year 2 of 4]: Couchoux, O. Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Awarded prior to hiring. [Status: Funded]

2021 [Year 1 of 4]: Couchoux, O. Insight Development Grant (\$7,492.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Awarded prior to hiring. [Status: Funded]

2021 [Year 1 of 4]: Couchoux, O. Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Awarded prior to hiring. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Member: Committee/Task Force

2020 – 2022: Technoscience Région Métropolitaine. Board member and Treasurer,

2020 – 2022: Chambre des notaires du Québec. Member of the financial assistance attribution committee

2020: CPA Canada Competency Map Task Force.

2020: CPA Canada Competency Map Task Force.

Other Professional Service Activities

2019: Smith School of Business, Kingston, Canada-Ontario. Conference co-organizer 2019 Alternative Accounts Conference

Reviewer: Ad Hoc Reviewer for a Journal

2024: Contemporary Accounting Research.

2024: Auditing: A Journal of Practice & Theory.

2022: Journal of Business Ethics.

2022: Contemporary Accounting Research.

2022: Accounting Perspectives.

2022: Accounting Horizons.

2022: Auditing: A Journal of Practice & Theory.

Scholarly Work in Progress

Working Papers

Couchoux, O. & Patry-Beaudoin, G. (2023). "Accounting for motherhood: the financial impact of competing societal ideals on mothers."

Couchoux, O., Malsch, B., & Nortier, E. (2023). "Knowledge transfer from seasoned auditors upon departure: identity belongings and self-organized processes."

Couchoux, O., Malsch, B., & Nortier, E. (2022). "Departing auditors and the risk of knowledge loss."

Couchoux, O. & Hazgui, M. (2022). "Impression management and the pursuit of regulatory legitimacy: The case of the Canadian Public Accountability Board."

Couchoux, O., Guénin, H., & Malsch, B. (2022). "Using independent audit inspections to (re)configure the public accounting partner prototype: The Canadian experience."

Couchoux, O. & Daoust, L. (2022). "Becoming an audit professional through the turmoil: The experience of staff auditors during periods of organizational, technological, and regulatory disruptions.."

Couchoux, O. (2022). "Audit committee members' style of oversight: Juggling expertise and complexity."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2023/Summer	BUSI3007	Auditing II	0.5	31	Main	100%
2022/Fall	BUSI3007	Auditing II	0.5	25	Main	100%
2022/Fall	BUSI3007	Auditing II	0.5	28	Main	100%
2022/Summer	BUSI4008	Advanced Management Accounting & Control	0.5	49	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Selected Media Appearances: Online

2024 - Why do some organizations' boards fail? The answer might lie in how directors perceive their expertise and responsibilities : Published in the Conversation February 2024

2024 - The "real" cost of unsubsidized, blinder-free daycare : Published February 2024

Credentials

Professional Memberships

Association des Femmes en Finance du Québec, N/A

Canadian Academic Accounting Association, N/A

Professional Development

Other Professional Development

2020: Young Administrators Network training. Jeune Chambre de Commerce de Montréal

Skills

Languages

French (native), English (fluent)

Research Reports

2021: Malsch, B., & Couchoux, O., Repairing the three-legged stool of audit quality., submitted to Financial Reporting Council (FRC) Collection of perspectives.

Service to the Community

Member of a Committee

2024: Academic Advisory Committee of the Accounting Standards Board (AcSB)

2022: Centre de la Petite Enfance Marie Quat'Poches, Board member and Treasurer

2022: Ma Place Au Travail

Other Community Service Activities

2019: Big Brothers Big Sisters of Greater Montreal, Mentor

Curriculum Vitae - Sprott School of Business

Aron Darmody, PhD
Associate Professor - Tenured,
Sprott School of Business (Marketing)
Telephone:

Email: aron.darmody@carleton.ca

AACSB Qualification: Scholarly Academic (SA) , Participation: Participating

Orcid: <https://orcid.org/0000-0002-6646-6028>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. York University.

Title: *Dissertation: "Place and Meaning: Exploring Fullness in the Themed Retail Environment," committee Dr. Eileen Fischer, Dr. Robert V. Kozinets, Dr. Detlev Zwick University of Illinois (Urbana/Champaign) Exchange student, Winter, 2004*

Master of Science. Dublin City University.

Title: *Winner of Diageo Sir Charles Harvey Award for "Best Business Masters in an Irish University" 2004 (First Class Honours – highest achievable grade in Irish University)*

Bachelor of Commerce. University College Cork.

Professional Certifications

Sales Development Certificate, 2003, Ireland.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Marketing, Sprott School of Business, Carleton University (September, 2022 - Present), Ottawa, Canada-Ontario.

Associate Professor, Sawyer Business School, Suffolk University (2011 - 2021), Boston, Massachusetts.

- 2011-2013 Visiting Assistant Professor of Marketing
- 2013-2020 Assistant Professor of Marketing
- 2020-2021 Associate Professor of Marketing

Course Director, Schulich School of Business, York University (2008 - 2010), Toronto, Canada-Ontario.

- Course Director, MKTG 4320 (Sports, Tourism and Leisure Marketing), Fall 2010. Developed this elective to teach to two separate classes of third and fourth-year undergraduate students. I designed the syllabus, prepared and conducted all lectures, and set and graded all team projects, mid-term and final exams.
- Course Instructor, MKTG 2030 (Introduction to Marketing Management): Developed and taught three consecutive undergraduate Introduction to Marketing courses in Winter 2008, 2009, 2010. I designed the syllabi, prepared and conducted all lectures, and set and graded all team projects, mid-term and final exams.

Other Employment

Senior Account Executive, Lites Marketing Group Limited (2004 - 2005), Dublin, Ireland (Northern). Lites Group: At the time Ireland's largest below-the-line Marketing Agency. Served as key account manager for clients including Pfizer, MBNA, O2 (Europe's second largest mobile phone operator) and ran ad-hoc campaigns for Diageo's Carlsberg, Budweiser and Guinness brands. My primary duties entailed hiring and directly managing teams of up to 30 full and part-time merchandisers nationwide, implementing and assisting in the preparation of clients' marketing campaigns and consistently being forced to meet strict client and company deadlines.

Sales and Business Development Executive, Western Union/FEXCO (2001 - 2003), Cork and Dublin, Ireland (Northern).

- Sold Western Union services to more than 50 retail and financial outlets throughout Ireland.
- Served as primary account representative for more than 300 existing outlets nationwide.
- Undertook training sessions, negotiated transaction and commission targets and worked with agents to achieve transaction goals. •
- Over an 18-month period I oversaw the implementation of on-site PC terminals and conducted staff training in the busiest 20% of national agencies, dramatically reducing costs and increasing efficiency. This project was completed ahead of schedule and significantly under budget. It was a significant overhaul of the entire money transfer transaction process, and was thus one of the core company objectives 2001-03.
- Helped increase total Western Union transaction volumes by 70% in my first year, approx. 50% in my second.

C. PROFESSIONAL HONOURS

2023: Sprott Excellence in teaching Award, Carleton University.

2018: Best Paper Award, New England Journal of Entrepreneurship (NEJE). "Psychological Ownership and Sensemaking in Non-Equity Crowdfunding".

2018: Best Paper Award, Eastern Academy of Management (EAM) Conference. "Psychological Ownership and Sensemaking in Non-Equity Crowdfunding".

2018: Best Paper Award, Eastern Academy of Management (EAM) Innovation Track. "Psychological Ownership and Sensemaking in Non-Equity Crowdfunding".

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	5		6
Articles-in-Progress (All)		8		8
Paper Presentations (Refereed)		3		3
Grants - Funded (both refereed and non-refereed)		1		1
Totals	1	17		18

Refereed Scholarly Publications

Articles in Refereed Journals

Tartila Banu, N., Darmody, A., & Neilson, L. (2024). RESCUER: Combining Passive and Active Learning Techniques to Teach Food Sustainability. *Journal of Marketing Education*, 42 (2). [B]

Huval, N., Darmody, A., & Smith, R. (2023). Psychological Ownership and Disownership in Reward-Based Crowdfunding. *Journal of Business Research*, 158, 113671. [A]

Darmody, A., & Zwick, D. (2023). Theorizing the costs of self-service technologies and co-creation by design. *Journal of Macromarketing*. [A]
DOI only

Dholakia, N., Darmody, A., Zwick, D., Dholakia, R., & Firat, F. (2021). Consumer Choicemaking in Hyper-Digital Marketspaces. *Journal of Macromarketing*, 45 (1). [A]

Darmody, A., & Zwick, D. (2020). Manipulate to Empower: Hyper-relevance and the contradictions of marketing in the age of surveillance capitalism. *Big Data & Society*, 7 (1), 1-12.

Labrecque, L., Markos, E., & Darmody, A. (2019). Addressing Online Behavioral Advertising and Privacy Implications: A Comparison of Passive Versus Active Learning Approaches. *Journal of Management Education*, 43 (1), 43-58. [B]

Advance online publication Article first published online: February 21, 2019

Yuksel, M., Darmody, A., & Venkatraman, M. (2019). When consumers own their work: Psychological ownership and consumer citizenship on crowdsourcing platforms. *Journal of Consumer Behavior*, 18 (1), 3-11. [A]

Elliot, E., Darmody, A., & Bicen, P. (2018). Value Co-Creation for Service Delivery Innovations in Emerging Markets. *Journal of Business Cases and Applications*, 22, 1-17.

Darmody, A., Yuksel, M., & Venkatraman, M. (2017). The Work of Mapping and the Mapping of Work: Prosumer Roles in Crowdsourced Maps. *Journal of Marketing Management*, 33 (13-14), 1093-1119. [A]

Yuksel, M., McDonald, M. A., Milne, G. R., & Darmody, A. (2017). The Paradoxical Relationship between Fantasy Football and NFL Consumption: Conflict Development and Consumer Coping Mechanisms. *Sport Management Review*, 20 (2), 198-210. [A]

Bonsu, S. K., Darmody, A., & Parmentier, M. (2010). Arrested Emotions in Reality Television. *Consumption Markets and Culture*, 13 (1), 91-107. [B]

Articles in Refereed Conference Proceedings

Full Paper

Venkatraman, M., Darmody, A., & Yuksel, M. (2018). To Tell and Not to Tell, That Is the Question. In Maggie Geuens, Mario Pandelaere, and Michel Tuan Pham, Iris Vermeir (Eds.) *European Advances in Consumer Research*, 11, 207-208.

Yuksel, M., Darmody, A., & Venkatraman, M. (2016). The Outcomes of Consumer Work in Crowdsourcing Platforms: Psychological Ownership and Consumer Citizenship Behavior. *Winter Marketing Academic Conference Proceedings*.

Huval, N., Smith, R., & Darmody, A. (2015). A Psychological Ownership Perspective of Crowdfunding. *Frontiers of Entrepreneurship Research*, 35.

Edited Books

Darmody, A., Woodall, T., Hitler, A., & Howarth, R. (2025). *Marketer Behaviour: An Introduction and Overview*.

Chapters in Edited Books

Darmody, A. (2013). Value Co-creation and New Marketing. In Eds. Stoyan Tanev and Marko Seppa (Eds.), *Value Co-creation: Best of TIM Review*.

Talent First Network. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Scholarly Publications

2024: Tartila Banu, N., Darmody, A., & Neilson, L.C., *How marketing classes can rescue 'ugly produce' from becoming food waste*.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Associate Editor

2023: Consumption, Markets & Culture (International).

Presentations

Papers Presented at Conferences

Refereed

Darmody, A. (2023). *A Co-creation Dystopia: Theorizing the Cost of Automation, Self-Service Technologies, and Co-creation by Design*. Consumer Culture Theory Conference, Lund, Sweden.

Darmody, A., Yuksel, M., & Venkatraman, M. (2022). *Consumer Knowledge Hiding Practices on Digital Platforms*. North American Association for Consumer Research Conference, Denver, Colorado.

Pontes, B. & Darmody, A. (2022). *Integrating branding theory under the novel concepts of Brand Genetics, Brand Genotype and Brand Phenotype*. European Marketing Academy, Budapest, Hungary.

Huvaj, M. Nesij, Darmody, A., & Smith, R. S. (2018). *Psychological Ownership and Sensemaking in Non-Equity Crowdfunding*. Eastern Academy of Management, Providence, Rhode Island.

Huvaj, N., Darmody, A., & Smith, R. (2018). *Psychological Ownership and Sensemaking in Non-Equity Crowdfunding*. Academy of Management (AOM), Chicago, Illinois.

Zwick, D. & Darmody, A. (2018). *Biopolitical marketing utopias: From surveillance to post-marketing*. Centre for Research into Information, Surveillance & Privacy, Stirling, Scotland.

Darmody, A. & Zwick, D. (2017). *Affect, Fantasy and 'Social' Services: Towards a critical theory of the service encounter*. Consumer Culture Theory Conference, Anaheim, California.

Markos, E., Labrecque, L. I., & Darmody, A. (2017). *Addressing Online Behavioral Advertising and Privacy Implications: A Comparison of Passive versus Active Learning*. Marketing EDGE Research Summit, New Orleans, Louisiana.

Yuksel, M., Darmody, A., & Venkatraman, M. (2016). *The Outcomes of Consumer Work in Crowdsourcing Platforms: Psychological Ownership and Consumer Citizenship Behavior*. American Marketing Association Winter Conference, Las Vegas, Nevada.

Huvaj, N., Smith, R., & Darmody, A. (2015). *A Psychological Perspective on Crowdfunding*. Babson College Entrepreneurship Research Conference, Boston, Massachusetts.

Darmody, A. (2014). *he Unspectacular Irish Pub: Themed Retail Environments as a Mise-en-Scene*. North American Association for Consumer Research Conference, Baltimore, Maryland.

Darmody, A. & Fischer, E. (2013). *Heritage Lost and Found: Sociality and Fullness in the Irish Theme Pub*. European Association for Consumer Research Conference, Barcelona, Spain.

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 2 of 5]: Darmody, A. Insight Grant (\$46,332.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 5]: Darmody, A. Insight Grant (\$46,332.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2013: North American Association for Consumer Research Conference, Baltimore, Maryland. Invited discussant at Roundtables entitled "Advancing the Production/Consumption dialectic in Consumer Culture Theory," at the North American Association for Consumer Research Conference 2009, Pittsburgh PA; "Consumption and Heritage"

Board Member: PRJ Editorial Review Board

2023: Journal of Macromarketing.

Member: Committee/Task Force

2014 – 2017: Suffolk University Centre for Teaching and Scholarly Excellence Advisory Board.

2014 – 2016: Sawyer Business School.

- member of TEALIG (Teaching and Learning Innovation Grant) Committee
- Faculty Governance Committee (FGC)
- - Teaching Committee
 - Academic Standing Committee
 - Marketing Department's Journal List Committee

Scholarly Work in Progress**Papers Under Review**

Darmody, A. & Zwick, D. (2022). "Losers of the Prosumer Economy: Theorizing the Cost of Automation, Self-Service and Co-Creation," Initial submission to *Journal of Marcomarketing*.

Darmody, A., Yuksel, M., Venkatraman, M., & Dolbec, P. (2022). "To tell and not to tell, that is the question: Consumer knowledge hiding on digital platforms," 2nd revise and resubmit to *International Journal of Research in Marketing*.

Working Papers

Banu, N., Neilson, L., Vanderby, K., & Darmody, A. (2022). "Food Consumption and Sustainability."

Elnahla, N., Neilson, L., & Darmody, A. (2022). "Frontline retail workers in a pandemic driven VUCA environment: A qualitative investigation in North America."

Darmody, A. & Zwick, D. (2022). "Interactivity, Power and Control: Marketing Automation and the reconfiguration of marketing logic."

Darmody, A. & Fischer, E. (2022). "The Personal is Professional: Lead Marketers, Identity Resources and Enhancing the Customer Experience."

Lee, K., O'Connor, G., Lajante, M., & Darmody, A. (2022). "Psychological Ownership in the Platform Economy."

Li, E. & Darmody, A. (2022). "Stakeholder-orientated and sustainable corporate philanthropy: a review and importance for COMPETES framework."

F. ACADEMIC RESPONSIBILITIES (TEACHING)**Teaching Schedule**

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4209	Consumer Culture Theory	0.5	32	Main	100%
2024/Winter	BUSI3205	Marketing Communications	0.5	58	Main	100%
2024/Winter	BUSI6201	Seminar in Marketing II	0.25	2	Main	50%
2023/Fall	BUSI3205	Marketing Communications	0.5	52	Main	100%
2023/Fall	BUSI3204	Marketing: New Tools	0.5	60	Main	100%
2023/Winter	BUSI4209	Consumer Culture Theory	0.5	41	Main	100%
2023/Winter	BUSI3205	Marketing Communications	0.5	48	Main	100%
2023/Winter	BUSI5280	Seminar in Marketing I: Management and Strategy	0.25	1	Main	50%
2023/Winter	BUSI6200	Seminar in Marketing I	0.25	3	Main	50%
2022/Fall	BUSI3204	Marketing: New Tools	0.5	59	Main	100%
2022/Fall	BUSI3205	Marketing Communications	0.5	47	Main	100%
2022/Winter	BUSI6201	Seminar in Marketing II	0.2	4	Main	40%
2022/Winter	BUSI5281	Seminar in Marketing II: Consumer Behaviour	0.05	1	Main	10%
2022/Winter	BUSI4209	Consumer Culture Theory	0.5	39	Main	100%
2022/Winter	BUSI3205	Marketing Communications	0.5	41	Main	100%
2021/Fall	BUSI3205	Marketing Communications	0.5	55	Main	100%

Service to the institution (Academic)**G. ADMINISTRATIVE RESPONSIBILITIES****Credentials**

Curriculum Vitae - Sprott School of Business

Qi Deng, PhD
Assistant Professor - Preliminary - Tenure Track
Sprott School of Business (Business Analytics)
Telephone:
Email: qideng3@cmail.carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Sprott School of Business, Carleton University.

Master of Business Administration. Central University of Finance & Economics.

Bachelor of Arts. College of Humanities and Development Studies, China Agricultural University.

Bachelor of Management. College of Economics and Management, China Agricultural University.

B. EMPLOYMENT

Academic Appointments

Assistant Professor, Sprott School of Business, Carleton University (July, 2023 - Present), Ottawa, Canada-Ontario.

Adjunct Professor, Faculty of Management, Dalhousie University (July, 2023 - Present), Halifax, Canada-Nova Scotia.

Assistant Professor, Rowe School of Business, Faculty of Management, Dalhousie University (July, 2019 - June, 2023), Halifax, Canada-Nova Scotia.

Sessional Lecturer, Sprott School of Business, Carleton University (September, 2018 - December, 2018), Ottawa, Canada-Ontario.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		9		9
Articles-in-Progress (All)	3			3
Publications in Conference Proceedings (Refereed)	2	1		3
Publications of Non-refereed or Invited Papers		1		1
Grants - Funded (both refereed and non-refereed)		1		1
Totals	5	12		17

Refereed Scholarly Publications

Articles in Refereed Journals

Deng, Q., Hine, M., Ji, S., & Wang, Y. (2023). What Makes Brand Social Media Posts Engaging? An Integrative Framework and Future Research Agenda. *Journal of Internet Commerce*, 22 (1), 1-39. [B]
Published online with DOI in 2021

Puri, M., Lee, K. Y., Deval, H., Deng, Q., Gonzalez, P., Young Ho Song (2023). Mobile Curated News Readers' Intention to Read Full-length Articles: Focusing on Heuristic and Systematic Factors. *Pacific Asia Journal of the Association for Information Systems*, 15 (2). [B]

Wang, Y., Deng, Q., & Ji, S. (2023). Understanding café culture: Toward a dynamic and holistic research framework. *Journal of Global Marketing*. [B]

Wang, Y., Deng, Q., Rod, M., & Ji, S. (2021). A thematic exploration of social media analytics in marketing and an agenda for future inquiry. *Journal of Strategic Marketing*. [A]

McShane, L., Pancer, E., Poole, M., & Deng, Q. (2021). Emoji, playfulness and brand engagement on Twitter. *Journal of Interactive Marketing*. [A]

Wang, Y., Rod, M., Deng, Q., & Ji, S. (2021). Exploiting business networks in the age of social media: The use and integration of social media analytics in B2B marketing. *Journal of Business and Industrial Marketing*. [A]

Deng, Q., Wang, Y., Rod, M., & Ji, S. (2021). Speak to head and heart: The effects of linguistic features on B2B brand engagement on social

media. *Industrial Marketing Management*. [A+]

Deng, Q., Hine, M., Ji, S., & Wang, Y. (2021). Understanding consumer engagement with brand posts on social media: The effects of post linguistic styles. *Electronic Commerce Research and Applications*. [B]

Deng, Q., Hine, M.J., Ji, S., & Sur, S. (2019). Inside the black box of dictionary building for text analytics: A design science approach. *Journal of International Technology and Information Management*. [C]

Deng, Q., & Ji, S. (2018). A review of design science research in Information Systems: Concept, process, outcome, and evaluation. *Pacific Asia Journal of the Association for Information Systems*. [B]

Deng, Q., Ji, S., & Wang, Y. (2017). Green IT practice disclosure: An examination of corporate sustainability reporting in the IT sector. *Journal of Information, Communication and Ethics in Society*. [B]

Wang, Y., Rod, M., Ji, S., & Deng, Q. (2017). Social media capability in B2B marketing: toward a definition and a research model. *Journal of Business and Industrial Marketing*. [A]

Deng, Q., & Ji, S. (2015). Organizational Green IT adoption: Concept and evidence. *Sustainability*. [C,Other]

Articles in Refereed Conference Proceedings

Full Paper

Deng, Q., Hine, M., Ji, S., & Wang, Y. (2020). Consumer engagement with brand posts on social media: Current state and research agenda. *Hawaii International Conference on System Sciences (HICSS)*.

Maui, Hawaii

Deng, Q., Hine, M., Ji, S., & Wang, Y. (2020). Investigating the impacts of brand social media posts' linguistic styles on consumer engagement. *Hawaii International Conference on System Sciences (HICSS)*.

Maui, Hawaii

Wang, Y., Rod, M., Ji, S., & Deng, Q. (2019). Applying Bourdieu's practice theory to social commerce: toward a dynamic process-oriented research framework. *International Conference on Information Resources Management (Conf-IRM)*.

Auckland, New Zealand

Wang, Y., Deng, Q., Rod, M., & Ji, S. (2018). Social media analytics in Marketing: A systematic and thematic literature review. *Administrative Sciences Association of Canada (ASAC)*.

Wang, Y., Rod, M., Ji, S., & Deng, Q. (2018). Neuroscience in Marketing: A literature review. *Administrative Science Association of Canada*.

Deng, Q., Ji, S., & Wang, Y. (2017). Green IT Practices across Industries: A Text-Mining based Analysis. *Americas Conference on Information Systems*.

Deng, Q., Ji, S., & Wang, Y. (2017). Design science research in Information Systems: A systematic literature review. *International Conference on Information Resources Management (Conf-IRM)*.

Wang, Y., Deng, Q., & Ji, S. (2017). Applying third place theory in mobile social media research: the physical-virtual integration. *International Conference on Information Resources Management (Conf-IRM)*.

Deng, Q., Hine, M.J., Ji, S., & Sur, S. (2017). Building an environmental sustainability dictionary for the IT industry. *Hawaii International Conference on System Sciences*.

Hawaii, US

Deng, Q., Ji, S., & Wang, Y. (2015). Green IT practice disclosure: An examination of corporate sustainability report in IT sector. *International Conference on Information Systems*.

Texas, US

Ji, S., & Deng, Q. (2015). Organizational Green IT adoption: Concept and evidence. *Americas Conference on Information Systems (AMCIS)*.

Puerto Rico, US

Deng, Q., & Ji, S. (2015). Why organizations adopt Green IT: A comprehensive review. *International Conference on Information Resources Management (Conf-IRM)*.

Wang, Y., Deng, Q., & Ji, S. (2015). A review of social media use in enterprises. *International Conference on Information Resources Management (Conf-IRM)*.

Deng, Q., & Ji, S. (2014). The role of gender in individual and group decision making: A research model. *Engineering and Business Management (EBM)*.

Other (Non-refereed) Scholarly Publications

Articles in non-Refereed journals

Applied or Integrative/application Scholarship

Conrad, C., Deng, Q., Caron, I., Shkurska, O., Skerrett, P., Binod Sundararajan (2022). How student perceptions about online learning difficulty influenced their satisfaction during Canada's Covid-19 response. *British Journal of Educational Technology*, 53 (3).

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Associate Editor

2022: Pacific Asia Conference on Information Systems (International). Associate editor, Pacific Asia Conference on Information Systems (PACIS 2022, Taipei-Sydney)

Presentations

Other Presentations

Invited Lecture

2022: May Research Day, Halifax, Canada-Nova Scotia. "Do Emojis Clutter Messages or Add Value? The Effects on Brand Perceptions", May Research Day, Faculty of Management, Dalhousie University, Halifax, NS, Canada, May 2022.

2021: MSc in Business Seminar, Rowe School of Business, Halifax, Canada-Nova Scotia. "Peer Review Process for Academic Publication: Using a Recent Publication as the Case", MSc in Business Seminar, Rowe School of Business, Dalhousie University, Halifax, NS, Canada, March 2021.

2020: PhD in Management Seminar, Sprott School of Business, Ottawa, Canada-Ontario. "Watch Your Tone: The Interactive Effect of Consumer Comment Valence and Brand Response - Linguistic Style on Brand Trust and Satisfaction", PhD in Management Seminar, Sprott School of Business, Carleton University, Ottawa, ON, Canada, September 2020.

2019: Rowe Research Seminar, Rowe School of Business, Halifax, Canada-Nova Scotia. "Investigating the Impacts of Brand Social Media Posts' Linguistic Styles on Consumer Engagement", Rowe Research Seminar, Rowe School of Business, Dalhousie University, Halifax, NS, Canada, November 2019.

2019: MSc in Business Seminar, Rowe School of Business, Halifax, Canada-Nova Scotia. "Understanding Consumer Engagement with Brand Posts on Social Media", MSc in Business Seminar, Rowe School of Business, Dalhousie University, Halifax, NS, Canada, December 2019.

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 2 of 2]: Deng, Q. Insight Development Grant (\$29,280.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Transferred from Dalhousie. [Status: Funded]

2023 [Year 1 of 2]: Deng, Q. Insight Development Grant (\$29,280.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Transferred from Dalhousie. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Chair: Conference / Track / Program

2025: Americas Conference on Information Systems, Montreal, Canada-Quebec. Emergent Research Forum Chair, Conference Committee, Americas Conference on Information Systems (AMCIS 2025, Montreal, QC, Canada)

Invited Lecture

2022: May Research Day, Halifax, Canada-Nova Scotia. "Do Emojis Clutter Messages or Add Value? The Effects on Brand Perceptions", May Research Day, Faculty of Management, Dalhousie University, Halifax, NS, Canada, May 2022.

2021: MSc in Business Seminar, Rowe School of Business, Halifax, Canada-Nova Scotia. "Peer Review Process for Academic Publication: Using a Recent Publication as the Case", MSc in Business Seminar, Rowe School of Business, Dalhousie University, Halifax, NS, Canada, March 2021.

2020: PhD in Management Seminar, Sprott School of Business, Ottawa, Canada-Ontario. "Watch Your Tone: The Interactive Effect of Consumer Comment Valence and Brand Response - Linguistic Style on Brand Trust and Satisfaction", PhD in Management Seminar, Sprott School of Business, Carleton University, Ottawa, ON, Canada, September 2020.

2019: Rowe Research Seminar, Rowe School of Business, Halifax, Canada-Nova Scotia. "Investigating the Impacts of Brand Social Media Posts' Linguistic Styles on Consumer Engagement", Rowe Research Seminar, Rowe School of Business, Dalhousie University, Halifax, NS, Canada, November 2019.

2019: MSc in Business Seminar, Rowe School of Business, Halifax, Canada-Nova Scotia. "Understanding Consumer Engagement with Brand Posts on Social Media", MSc in Business Seminar, Rowe School of Business, Dalhousie University, Halifax, NS, Canada, December 2019.

Other Professional Service Activities

2023: Biennial Conference on Historical Analysis and Research in Marketing, Ottawa, Canada-Ontario.

2019: Americas SAP User Group (ASUG), Halifax, Canada-Nova Scotia. Volunteer, Americas SAP User Group (ASUG) Atlantic Canadian Chapter Meeting (November 2019, Halifax, NS, Canada)

Reviewer - External Tenure

2021: Americas Conference on Information Systems, Montreal, Canada-Quebec. Review coordinator, Conference Committee, Americas Conference on Information Systems (AMCIS 2021, Montreal, QC, Canada)

Reviewer: Ad Hoc Reviewer for a Journal

2023: Information & Management.

2022 – 2023: Journal of Business Research.

2021 – 2023: Electronic Commerce Research and Applications.

2020: Information & Management.

2018: Information & Management.

Scholarly Work in Progress

Papers Under Review

Deng, Q., McShane, L., Wang, Y., & Banu, N. (2024). "Can emojis and B2B mix? Examining emojis in B2B social media engagement," Initial submission.

Deng, Q. & McShane, L. (2023). "Can emojis convey competence? Understanding the effects of emoji variations on brand competence perceptions via fluency," Initial submission to *Journal of Marketing Communications*.

Deng, Q. & McShane, L. (2023). "Emoji are not all created equal: The effects of emoji variations on brand perceptions and intentions," Initial submission to *Computers in Human Behavior*.

Working Papers

Wang, X. & Deng, Q. (2023). "Can chatbots perform better with emojis? The role of emojis in consumers' continuance usage intention of customer service chatbots."

Description: Work in progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4407	Business Analytics Methods	0.5	5	Main	100%
2023/Fall	ITIS5408	Social Analytics	0.5	18	Main	100%
2023/Fall	BUSI5510	Data Science for Business	0.5	15	Main	100%
2023/Fall	BUSI4408	Social Analytics	0.5	48	Main	100%
2018/Fall	BUSI4400	IS Strategy, Management & Acquisitions	0.5	35	Main	100%

Service to the institution (Academic)

External Committees

Thesis Assignments

Masters Thesis Committees:

2023-2024: Anam Nuzha

2023-2024: Kellie Dalton

2023-2024: Reihane Sobhaerooy

2023-2024: Abiodun Oyelami

2022-2023: Rahil Setayesh Valipour

2021-2022: Malti Puri

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Other Activities

2023 - Reviewer : Reviewer of Mitacs Accelerate funding

Credentials

Professional Development

Other Professional Development

2019 – 2023: SAP University Alliance. Member

2019 – 2023: Americas SAP User Group (ASUG). Member

2020: SAP University Alliance. SAP Analytics Trained (certificate), SAP University Alliance Summer Bootcamps

2019: SAP University Alliance. SAP ERPSim Certificate (Level 1), SAP University Alliances

2013: Sprott School of Business, Carleton University. Teaching Certificate

Curriculum Vitae - Sprott School of Business

Angela Dionisi, PhD
Associate Professor - Tenured, 2020
Sprott School of Business (Management and Strategy)
Telephone: 613-520-2600 x3134
Email: angela.dionisi@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
Orcid: <https://orcid.org/0000-0002-7489-5615>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Queen's University.

Title: *Dissertation Title: "Vicarious Exposure to Male Sexual Harassment: Consequences, Attributions & Behavioural Responses" Committee Members: Julian Barling (Supervisor), Jana Raver, Jacoba Lilius*

Master of Science. Queen's University.

Title: *Thesis Title: "Managing Uniqueness across the Negotiation Divide: Balancing Between- Group Connection and Within-Group Closeness" Committee Members: Susan Brodt (Supervisor), William Cooper*

Bachelor of Arts. Queen's University.

Title: *B.A. (Hons.), with Distinction*

B. EMPLOYMENT

Academic Appointments

Incoming Director, Centre for Research on Inclusion at Work (CRIW), Sprott School of Business (2022 - Present), Ottawa, Canada-Ontario.

Associate Professor of Management, Sprott School of Business, Carleton University (July, 2020 - Present), Ottawa, Canada-Ontario. Cross-Appointed to the Department of Psychology

Assistant Professor of Management, Sprott School of Business, Carleton University (2014 - 2020), Ottawa, Canada-Ontario.

Instructor, Queen's School of Business, Queen's University (2010 - 2011), Kingston, Canada-Ontario.

Other Employment

Graduate Teaching Assistant, Queen's School of Business, Queen's University (2009 - 2014), Kingston, Canada-Ontario.

Graduate Research Assistant, Queen's School of Business, Queen's University (2007 - 2014), Kingston, Canada-Ontario.

C. PROFESSIONAL HONOURS

2015: Women and Work Research Incubator Grant, The Centre for Research and Education on Women and Work (CREWW), Carleton University.

2011: Doctoral Fellowship, Social Sciences and Humanities Research Council.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		4		4
Articles-in-Progress (All)		19		19
Paper Presentations (Refereed)		12		12
Grants - Funded (both refereed and non-refereed)		7		7
Totals		42		42

Refereed Scholarly Publications

Articles in Refereed Journals

Dionisi, A., Smith, C. J., & Dupré, K. E. (2023). Weathering the storm alone or together: Examining the impact of COVID-19 on sole and partnered working mothers. *Journal of Community Psychology*, 51 (6), 2408-2429. [B]
Volume assigned in 2023, DOI only in 2022

Dionisi, A., & Dupré, K. (2023). Disrespectful Colleagues, Dysfunctional Parenting: The effect of workplace incivility on parental attitudes, well-being

and behaviors. *Stress and Health*, 39 (4), 912-926. [A]

Smith, C. J., Dupré, K. E., & Dionisi, A. (2022). Sexual misconduct reporting: The silencing effects of hegemonic masculinity. *Equality, Diversity and Inclusion*. [B]

Vol. ahead-of-print No. ahead-of-print. DOI only

Dionisi, A., & Barling, A. M. (2019). What happens at home does not stay at home: The role of family and romantic partner conflict in destructive leadership. *Stress and Health*. [A]

Robertson, J., Dionisi, A., & Barling, J. (2018). Linking Attachment Theory to Abusive Supervision. *Journal of Managerial Psychology*, 33 (2), 214-228. [B]

Dionisi, A., & Barling, J. (2018). It Hurts Me Too: Examining the Impact of Male Gender Harassment on Observers' Attitudes, Well-Being and Behavior. *Journal of Occupational Health Psychology*, 23, 303-319. [A]

Dionisi, A., & Barling, J. (2015). Spillover and crossover of sex-based harassment from work to home: Supervisor gender harassment affects romantic relationship functioning via targets' anger. *Journal of Organizational Behavior*, 36, 196-215. [A+]

Byrne, A., Dionisi, A., Barling, J., Akers, A., Robertson, J., Lys, R., Wylie, J. & Dupré, K. (2014). The depleted leader: The influence of leaders' diminished psychological resources on leadership behaviours. *Leadership Quarterly*, 25, 344-357. [A+]

Authors A. Byrne and A. Dionisi contributed equally and share first authorship.

Dionisi, A., Barling, J., & Dupré, K. (2012). Revisiting the comparative outcomes of workplace sexual harassment and aggression. *Journal of Occupational Health Psychology*, 17, 398-408. [A]

Other (Non-refereed) Scholarly Publications

Chapters in non-refereed books

Dionisi, A., & Barling, J. (2011). Sexual harassment: A big issue for small and medium sized enterprises?. In E.K. Kelloway & C.L. Cooper (Eds.), *Occupational health and safety for small and medium sized enterprises* (pp. 129-158). London: Edward Elgar Publishing.

Description: <http://dx.doi.org/10.4337/9780857938701>

Brodtt, S.E., & Dionisi, A. (2011). When peers become leaders: The effects of internal promotion on workgroup dynamics. In R. Searle & D. Skinner (Eds.), *Trust and human resource management* (pp. 247-267). Cheltenham, UK: Edward Elgar Publishing.

Fisk, G.M., & Dionisi, A. (2010). Building and sustaining resilience in organizational settings: The critical role of emotion regulation.. In W.J. Zerbe, C.E.J. Hartel & N. M. Ashkanasy (Eds.), *Research on emotion in organizations: Vol 6. Emotions and organizational dynamism* (pp. 167-188). Bingley, UK: Emerald Group Publishing Limited.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Dionisi, A. & Smith, C. (2023). *The perils of longing for pre-pandemic days: How COVID-19-related grief leads to coworker-targeted incivility*. Work, Stress and Health Annual Conference, Virtual, Virtual.

Description: Virtual

Dionisi, A. & Smith, C. (2023). *Lay understandings of sexual harassment motivations: An exploration of perceived causes, with consideration of target gender, perpetrator gender, and harassment type*. Work, Stress and Health Annual Conference, Virtual, Virtual.

Description: Virtual

Hodgins, A., Dupre, K., & Dionisi, A. (2023). *The Personal and Job-Related Outcomes of Workplace Mistreatment Among Young Adults with Disabilities*. Canadian Psychological Association Convention, Toronto, Canada-Ontario.

Hodgins, A., Dupre, K., & Dionisi, A.M. (2023). *Exploring Workplace Mistreatment Among those with Disabilities*. Centre for Research on Inclusion at Work, Ottawa, Canada-Ontario.

Smith, C. & Dionisi, A. (2023). *Responding under duress: An examination of employees' behavioral reactions to workplace mistreatment as a function of work precarity*. Centre for Research on Inclusion at Work, Ottawa, Canada-Ontario.

Wright, D. & Dionisi, A. (2023). *Employer Empowerment and Equity*. Centre for Research on Inclusion at Work, Ottawa, Canada-Ontario.

Dionisi, A., Smith, C., & Dupré, K. (2022). *Learning about sex-based harassment: Parents as an informational source among youth*. Work and Family Researcher Network Annual Conference, New York, New York.

Dupré, K., Dionisi, A., & Smith, C. (2022). *The Widespread Effects of Parents' Workplace Cyberbullying: An Examination of the Impact on Children's Behaviour*. Work and Family Researcher Network Annual Conference, New York, New York.

Smith, C., Dupré, K., & Dionisi, A. (2022). *COVID-19 fear among working parents relates to children's depressive symptoms through behavioural and relational pathways*. Work and Family Researcher Network Annual Conference, New York, New York.

Smith, C. & Dionisi, A. (2022). *The online self-disclosure of workplace mistreatment: A novel construct*. Academy of Management Annual Conference, Seattle, Washington.

Smith, C.J., Dionisi, A., & Dupre, K. (2021). *Weathering the Storm Alone or Together: Examining the Impact of COVID-19 on Sole and Partnered*

Working Mothers. Association for Psychological Science Annual Convention, Virtual, Virtual.

Dursun, A., Dupré, K., & Dionisi, A. (2020). *Looking Beneath the Surface: The Personal and Family Consequences of Occupational Injuries*. Work and Family Research Conference, Virtual, Virtual.

Dionisi, A. & Dupré, K. (2018). *Sexual harassment spillover: The impact of gender harassment on the parenting experiences of working mothers*. International Congress of Applied Psychology, Montreal, Canada-Quebec.

Dionisi, A. & Dupré, K. (2018). *Uncivil workplace, uncivil home: Workplace incivility and harmful parenting behaviour*. American Psychological Association, Los Angeles, California.

Description: "Winner of divisional "Best Poster" award and second place runner up for overall "Most Outstanding Conference Poster" award.

Dionisi, A. & Dupré, K. (2018). *Predicting the Intent to Report Organizational Mistreatment*. International Congress of Applied Psychology, Montreal, Canada-Quebec.

Robertson, J., Dionisi, A., & Barling, J. (2018). *Linking attachment to abusive supervision*. Society for Industrial & Organizational Psychology Annual Meeting, Chicago, Illinois.

Dionisi, A. & Barling, J. (2017). *What happens at home doesn't stay at home: Family and romantic partner experiences indirectly predict leadership quality*. Academy of Management (AOM), Atlanta, Georgia.

Dionisi, A. & Barling, J. (2015). *Vicarious exposure to male sexual harassment: Perceived motives and evaluations of ethicality*. American Psychological Association's Work, Stress and Health Annual Meeting, Atlanta, Georgia.

Dionisi, A. & Barling, J. (2013). *Spillover and crossover of sex-based harassment from work to home: Supervisor gender harassment affects marital functioning via targets' anger*. Academy of Management Meeting, Lake Buena Vista, Florida.

Bergenwall, A., Barling, J., Byrne, A., Dionisi, A., Dupré, K., R. Lys, J. Robertson, and J. Wylie (2012). *Being well, leading well? Leaders' psychological distress predicts leadership behaviours*. Society for Industrial & Organizational Psychology Annual Meeting, San Diego, California.

Dionisi, A., Dupré, K., & Barling, J. (2012). *To voice or not to voice: An examination of the willingness to report workplace aggression*. International Congress of Psychology 2012 Annual Meeting, Cape Town, South Africa.

Christie, A., Dionisi, A., & Barling, J. (2012). *Gaining power, reactive egoism, and self-interested behaviour*. Canadian Psychological Association Annual Conference, Halifax, Canada-Nova Scotia.

Dionisi, A., Christie, A., & Barling, J. (2011). *Feeling more powerful than you should: Objective and perceptual changes in power*. Association for Psychological Science Annual Convention, Washington, District of Columbia.

Dionisi, A., Barling, J., & Dupré, K. (2011). *Another look at the comparative outcomes of workplace sexual harassment and aggression*. Academy of Management Meeting, San Antonio, Texas.

Dionisi, A. (2011). *Making sense of love: A multi-level approach to workplace romance & team effects*. American Psychological Association's Work, Stress and Health Annual Meeting, Orlando, Florida.

Other Presentations

Invited Lecture

2023: CN Centre for Occupational Health and Safety, Halifax, Canada-Nova Scotia. 12th Annual Summer Institute: Building Healthy and Safe Work Communities. "Mistreatment and Employees with Disabilities at Work." * Invited Speaker; Featured Research

2021: Carleton University Department of Psychology Proseminar Series.

Keynote Address

2016: RBC Foundation Women in Management Speaker Series, Ottawa, Canada-Ontario. "It's Time to Take Another Look: Re-examining Sexual Harassment Victimization"

Presentation

2021: Centre for Research on Inclusion at Work. Centre for Research on Inclusion at Work. "Weathering the Storm Alone: Examining the Impact of COVID-19 on the Psychological and Job-related Well-being of Sole Working Mothers."

2018: Canadian Senate Subcommittee on Human Resources, Ottawa, Canada-Ontario. Review of the Canadian Senate Policy on Prevention and Resolution of Harassment in the Workplace. *Invited Expert Witness Testimony

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 2 of 4]: Dionisi, A. Insight Grant (\$36,062.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 2]: Dionisi, A. Insight Development Grant (\$36,593.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 1 of 4]: Dionisi, A. Insight Grant (\$36,062.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 2]: Dionisi, A. Insight Development Grant (\$36,593.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 2 of 2]: Dionisi, A. Insight Development Grant (\$27,813.00 of a total grant amount of \$57,326.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Workplace sexual harassment and the family: Family-specific consequences and family as a foundational intervention. [Status: Funded]

2021: Dionisi, A. CRIW Ignite! Special Funding for Literature Reviews (\$9,000.00), Principal Investigator, PRI-Carleton University. Principle Investigator; In collaboration with Kathyne Dupré and Chelsie Smith (co-investigators). [Status: Funded]

2020 [Year 1 of 2]: Dionisi, A. Insight Development Grant (\$29,513.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Workplace sexual harassment and the family: Family-specific consequences and family as a foundational intervention. [Status: Funded]

2020: Dionisi, A. Research Achievement Award (\$15,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2020: Dionisi, A. COVID Supplement (\$9,101.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020: Schweitzer, L., Angela, D., Firoozi, M., & Nardon, L., Multidisciplinary Research Catalyst Fund, Collaborator, Carleton University, Vice-President (Research and International). [Status: Funded]

2017 [Year 2 of 2]: Dionisi, A. Start-up Funds (\$2,500.00 of a total grant amount of \$5,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2016 [Year 2 of 2]: Dionisi, A. Start-up Funds (\$2,500.00 of a total grant amount of \$5,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2015 [Year 1 of 2]: Dionisi, A. Start-up Funds (\$2,500.00 of a total grant amount of \$5,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2015 [Year 1 of 2]: Dionisi, A. Start-up Funds (\$2,500.00 of a total grant amount of \$5,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Panelist

2015: Canada School of Public Service. The Federal Youth Network (FYN) in partnership with the Canada School of Public Service. "A panel discussion on Sexual Harassment in the Public Service." * Invited Speaker; Expert Commentary

Invited Lecture

2023: CN Centre for Occupational Health and Safety, Halifax, Canada-Nova Scotia. 12th Annual Summer Institute: Building Healthy and Safe Work Communities. "Mistreatment and Employees with Disabilities at Work." * Invited Speaker; Featured Research

2021: Carleton University Department of Psychology Proseminar Series.

Keynote Address

2016: RBC Foundation Women in Management Speaker Series, Ottawa, Canada-Ontario. "It's Time to Take Another Look: Re-examining Sexual Harassment Victimization"

Reviewer: Ad Hoc Reviewer for a Journal

2012 – 2022: Academy of Management Annual Meeting.

2012 – 2022: Journal of Occupational Health Psychology.

2012 – 2022: Sex Roles.

2012 – 2022: Journal of Applied Social Psychology.

Scholarly Work in Progress

Papers Under Review

Smith, C. & Dionisi, A. (2023). "Voice hesitancy: A novel construct for the workplace mistreatment literature," Initial submission to *Journal of Organizational Behavior*.

Dionisi, A. & Smith, C. (2023). "Learning about sex-based harassment: Parents as a key informational source," Initial submission.

Description: Under First Round Review at Sex Roles (Sprott PRJ Ranking: A)

Dionisi, A. & Smith, C. (2023). "To be helpful, funny, mean, or for reasons in between?: Lay understandings of sexual harassment motivations," Initial submission.

Description: Sex Roles (Sprott PRJ Ranking: A)

Dionisi, A., Smith, C., & Dupré, K. (2020). "Weathering the storm alone: Examining the impact of COVID-19 on the psychological and job-related well-being of sole versus coupled working mothers," Initial submission to *Equality, Diversity and Inclusion*.

Dionisi, A. & Dupre, K. (2020). "Disrespectful colleagues, destructive parenting: The effect of workplace incivility on mothers' childrearing behaviors," Initial submission.

Description: Journal of Applied Psychology.

Dionisi, A., Dupré, K., & Smith, C. (2020). "Fostering Employee Voice in Cases of Workplace Aggression: The Role of Organizations.," Initial submission to *Personnel Review*.

Dionisi, A. (2019). "To Help or to harm?: Witnesses' behavioral responses to male-on-male sexual harassment," 2nd revise and resubmit to *Journal of Organizational Behavior*.

Dionisi, A. & Barling, J. (2019). "Bearing Witness to the Sexual Harassment of Men: Observer Perceptions and Judgments," Initial submission to *Human Resource Management Journal*.

Working Papers

Hodgins, A., Dupre, K., & Dionisi, A. (2023). "The personal and job-related outcomes of workplace mistreatment among young adults with disabilities," targeted for Equality, Diversity and Inclusion.

Description: In preparation for submission

Dionisi, A., Dupre, K., & Smith, C. (2023). "Let's talk about sex(-based harassment): How parents speak to their children about this mistreatment."

Description: In preparation for submission to Sex Roles; Sprott PRJ Ranking: A

Smith, C. & Dionisi, A. (2023). "Responding under duress: An examination of employees' responses to mistreatment as a function of work precarity," targeted for Journal of Occupational Health Psychology.

Description: In preparation for submission

Dupre, K., Dionisi, A., & Smith, C. (2023). "The widespread effects of parents' workplace cyberbullying: An examination of the impact on children's behaviour."

Description: In preparation for submission

Ladki, C., Martone, P., Dupre, K., & Dionisi, A. (2023). "Passive leadership and employees with disabilities' workplace loneliness and dignity: The moderating role of self-compassion," targeted for Leadership Quarterly.

Description: In preparation for submission

Dionisi, A. M., Smith, C., & Dionisi, A. (2022). "The perils of longing for pre-pandemic days: How COVID-19-related grief leads to coworker-targeted incivility.," targeted for Stress and Health.

Dionisi, A. & Al Guindy, M. (2019). "Hashtag activism and its resistance: An examination of #MeToo on Twitter."

Lauch, K. & Dionisi, A. (2019). "Gendered by design: The socialization of women in engineering school," targeted for Gender and Education.

Dursun, A., Dupré, K., & Dionisi, A. (2019). "Looking Beneath the Surface: The Personal and Family Consequences of Occupational Injuries," targeted for Work and Family Research Conference.

Dionisi, A. & Rojas-Mendez, J. (2019). "Gender, personality and unethical negotiating behaviour."

McEvoy, A., Smith, C., Dupré, K., & Dionisi, A. (2019). "Whose fault is it anyway? Blame attributions in vicarious experiences of occupational injuries," targeted for Journal of Safety Research.;

Dionisi, A. & Dupré, K. (2018). "Sexual harassment spillover: The impact of gender harassment on the parenting experiences of working mothers," targeted for Journal of Organizational Behavior.

Description: In preparation for submission

Dionisi, A., Barling, J., & Dupré, K. (2018). "Gender(s) and leadership."

Description: In preparation for data collection

Dupre, K., Barling, J., & Dionisi, A. (2018). "Leadership construct clean-up: A comparison of transformational, charismatic, ethical, and authentic leadership.."

Description: Data collection stage

Dionisi, A. & Barling, J. (2018). "The impact of workplace mistreatment on ethical, transformational, and laissez-faire leadership."

Description: Data collection stage

Dionisi, A. & Barling, J. (2018). "A portrait of adolescent employees' workplace harassment and aggression experiences."

Description: Data collection stage

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI2101	Organizational Behaviour	0.25	92	Main	50%

2024/Winter	BUSI4111	Training and Development	0.25	11	Main	50%
2023/Fall	BUSI4112	Organizational Leadership	0.5	47	Main	100%
2023/Fall	BUSI4111	Training and Development	0.25	11	Main	50%
2023/Fall	BUSI2101	Organizational Behaviour	0.25	111	Main	50%
2023/Winter	BUSI4112	Organizational Leadership	0.5	32	Main	100%
2023/Winter	BUSI4111	Training and Development	0.5	24	Main	100%
2023/Winter	BUSI2101	Organizational Behaviour	0.25	114	Main	50%
2022/Fall	BUSI4111	Training and Development	0.5	24	Main	100%
2022/Fall	BUSI2101	Organizational Behaviour	0.25	121	Main	50%
2020/Winter	BUSI4112	Organizational Leadership	0.5	50	Main	100%
2019/Fall	BUSI4112	Organizational Leadership	0.5	47	Main	100%
2019/Fall	BUSI3106	Managing Conflict & Negotiation	0.5	59	Main	100%
2019/Winter	BUSI2121	Intro Organizational Behaviour	0.5	125	Main	100%
2019/Winter	BUSI4112	Organizational Leadership	0.5	41	Main	100%
2018/Fall	BUSI4112	Organizational Leadership	0.5	48	Main	100%
2018/Fall	BUSI3106	Managing Conflict & Negotiation	0.5	53	Main	100%
2018/Winter	BUSI4112	Oirganizational Leadership	0.5	28	Main	100%
2017/Fall	BUSI4112	Oirganizational Leadership	0.5	50	Main	100%
2017/Fall	BUSI3106	Managing Conflict & Negotiation	0.5	60	Main	100%
2016/Winter	BUSI4112	Oirganizational Leadership	0.5	34	Main	100%
2016/Winter	BUSI3106	Managing Conflict & Negotiation	0.5	28	Main	100%
2015/Fall	BUSI3106	Managing Conflict & Negotiation	0.44	24	Main	89%
2015/Fall	BUSI3106	Managing Conflict & Negotiation	0.06	3	Main	11%
2015/Fall	BUSI4112	Oirganizational Leadership	0.5	32	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2018-2019: Ana Dursun, M.A. Thesis Defense Committee Member

2017-2018: Anne-Marie Cote, M.A. Thesis Defense Committee Member

University Assignments

Masters Thesis Committees:

2022-2023: Audrey Hodgins

2018-2019: Katarina Lauch: Supervision

University Assignments

PhD. Comprehensive Committees:

2015-2016: Amanda Popowicz-Soni, Ph.D Committee Member

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: Centre for Inclusion in Work (Co-Chair)

2023-2024: MAS - OB Hiring

2019-2020 – 2020-2021: Sprott Unit Standards Review Committee (Co-Chair)

Sprott School of Business

School Assignments

Other Committees:

2018-2019 – 2020-2021: Senate Academic Governance Committee

H. OTHER

Selected Media Appearances: Radio

2017 - The Arlene Bynon Show, Sirius Satellite Radio : The Harvey Weinstein Effect: Sexual harassment among Canadian women. Invited Interview; Expert Commentary

Selected Media Appearances: Print

2017 - Edwards, K. (MacLeans): Half of Canadian women face unwanted sexual pressure, poll finds : Invited Interview; Expert Commentary

2014 - Morantz, A. (QSB Insight), The Depleted Leader : Invited Interview; Featured Research

2014 - Sharratt, A. (QSB Insight), Harassment's Insidious Shockwaves: Abuse at work or home spills over into other environments and can affect future career and romantic success. . : Featured Research

Selected Media Appearances: Online

2018 - Invited Interview; Expert Commentary : Carleton University (2018). The Real Toll of Sexual Harassment. Carleton University "Our Stories".

2018 - (Un)Well at Work: Exploring factors that can help and hinder your well-being, happiness, and success on the job. : *Invited Expert Blogger for Psychology Today

2018 - The subtle way your crappy job may be screwing up your kids. Moneyish. Invited Interview; Feature Article

2018 - Hostile work environments are hurting moms & kids, according to a new study. Invited Interview; Feature Article

2018 - New study suggests your terrible boss may be making you a worse parent. Feature Article

2018 - A New Study Says You Can Blame Your Kid's Bad Behavior on Your Nasty Coworkers. Working Mother. Feature Article

2018 - Rude to your coworker? Think of the children. Invited Interview; Feature Article and Press Release

Other Activities

2018 - Review of the Canadian Senate Policy on Prevention and Resolution of Harassment in the Workplace. : Invited Expert Witness Testimony

Selected Media Appearances: Online

2018 - The Real Toll of Sexual Harassment. Invited Interview; Expert Commentary : Carleton University "Our Stories".

2019 - Troubled at Home, Leaders Lash Out or Withdraw : Smith Business Insight, Invited Interview; Featured Research

2019 - When Men Sexually Harass Male Co-Workers, Witnesses Feel the Effects : Smith Business Insight, Invited Interview; Feature Article

2019 - The Familial Origins of Toxic Leadership: Leaders' draining personal lives can impede their professional competence

Credentials

Professional Memberships

Academy of Management (AOM), N/A

Association for Psychological Science (APS), N/A

International Association of Applied Psychology (IAAP), N/A

Society for Industrial and Organizational Psychology (SIOP), N/A

Society for Personality and Social Psychology (SPSP), N/A

Professional Development

Instructional-Related Conference

2012: Queen's Center for Teaching & Learning. Becoming More Successful in Teaching

2010: Academy of Management (AOM). OB Professional Development Teaching Incubator

Other Professional Development

2023: Ethical Conduct for Research Involving Humans, Course on Research Ethics (TCPS 2: CORE 2022).

2019: Multiple Choice Retreat.

2019: Capture - An Introduction to Creating Course Videos.

2018: SSHRC Insight Development Grant Workshop.

2018: Smart Women Speaking Up: Media Training Session.

Professional Seminars / Workshops

2019: Ethical Conduct for Research Involving Humans, Course on Research Ethics (TCPS 2: CORE).

2013: Academy of Management (AOM). Organizational Behaviour Doctoral Consortium, Nominated Participant.

2011: Association for Psychological Science. Multilevel Modeling workshop (Dr. Elizabeth Page-Gould)

2011: Association for Psychological Science. An Overview of Latent (Growth) Curve Models Using Structural Equation Models (Dr. Kenneth Bollen)

2010: Academy of Management Meeting. Halfway There, Now What? pre-dissertation doctoral workshop

2010: Course in Human Research Participant Protection (CHRPP), Queen's University. Introduction to Structural Equation Modeling, 3-day Summer Short Course, Center for the Advancement of Research Methods and Analysis, (Dr. Larry Williams)

Skills

Expertise

English language proficiency (read/write/speak)

Service to the Community

Speech / Presentation at a Community Meeting

2015: The Federal Youth Network (FYN) in partnership with the Canada School of Public Service., Invited Speaker: panel discussion on Sexual Harassment in the Public Service.

Curriculum Vitae - Sprott School of Business

Ahmed Doha, PhD
Associate Professor - Tenured, 2017
Sprott School of Business (Technology and Operations/Supply Chain Management)
Telephone: 613-520-2600 x1909
Email: ahmed.doha@carleton.ca
AACSB Qualification: Additional (A) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-8717-4019>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. York University.

Title: *Dissertation: The Dynamics between Imitation and Innovation within the Firm.* Dissertation Committee: Dr. Mark Pagell (Chair), Dr. Morgan Swink, Dr. Ajay Agrawal, and Dr. David Johnston.

Master of Science. Queen's University.

Title: *Thesis: "Performance Evaluation and Enhancement of Multiple Access Control in IEEE 802.16 Networks"* Supervisor: Dr. Hossam Hassanein

Diploma. Information Technology Institute.

Bachelor of Science. Mansoura University.

Title: *Thesis: "Neural Networks Applications in Artificial Intelligence"*

Professional Certifications

Project Management Professional (PMP), 2000, Stevens Institute of Technology / Lucent Technology Learning Performance Center, USA..

B. EMPLOYMENT

Academic Appointments

Associate Professor of Supply Chain Management, Sprott School of Business, Carleton University (2018 - Present), Ottawa, Canada-Ontario.

Assistant Professor of Supply Chain Management, Sprott School of Business, Carleton University (2010 - 2018), Ottawa, Canada-Ontario.

Lecturer in Supply Chain Management, Sprott School of Business, Carleton University (2010 - 2012), Ottawa, Canada-Ontario.

Instructor / Research Assistant, Schulich School of Business, York University (2006 - 2010), Toronto, Canada-Ontario.

Other Employment

Research Assistant / Teaching Assistant, Electrical and Computer Engineering Department, University of Waterloo (2005 - 2006), Waterloo, Canada-Ontario.

Research Assistant / Teaching Assistant, Electrical and Computer Engineering Department, Queens University (2003 - 2005), Kingston, Canada-Ontario.

Regional Project Manager, Lucent Technologies Inc. (1999 - 2002), NA, Unknown.

Wireless Networks Design Engineer, Nortel Networks Inc. (1997 - 1998), NA, Unknown.

C. PROFESSIONAL HONOURS

2020: Best Presentation Award,, ACM International Conference on Software and Information Engineering (ICSIE). "Domain-Specific Knowledge Graphs: The Case for Literature Discovery in Social Sciences and Humanities," Best Presentation Award,.

2014: Best Paper Proceedings, Social Issues in Management Division, Academy of Management.

2012: Best Paper Proceedings, Technology and Innovation Management Division, Academy of Management.

2010: Best Reviewer Award, Academy of Management. Technology and Innovation Management Division, Academy of Management.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1			1
Publications in Conference Proceedings (Refereed)		1		1
Grants - Funded (both refereed and non-refereed)	1	4		5

Totals	2	5		7

Refereed Scholarly Publications

Articles in Refereed Journals

- Doha, A., Elnahla, N., & McShane, L. (2019). Social commerce as social networking. *Journal of Retailing and Consumer Services*, 47, 307-321. [A]
- Doha, A., Pagell, M., Swink, M., & Johnston, D. (2018). The Imitator's Dilemma: Why Imitators Should Break out of Imitation. *Journal of Product Innovation Management*, 35 (4), 543-564. [A+]
- Doha, A., Ghasemaghaei, M., & Hassanein, K. (2017). Social Bundling: A Novel Method to Enhance Consumers' Intention to Purchase Online Bundles. *Journal of Retailing and Consumer Services*, 35, 106-117. [A]
- Doha, A., Pagell, M., Swink, M., & Johnston, D. (2016). Measuring Firms' Imitation Activity. *R&D Management*, 4 (4), 522-533. [A]
- Doha, A., Das, A., & Pagell, M. (2013). The Influence of Product Life Cycle on the Efficacy of Purchasing Practices. *International Journal of Operations and Production Management*, 33 (4), 470-498. [A]

Articles in Refereed Conference Proceedings

Full Paper

- Doha, A. (2020). Domain-Specific Knowledge Graphs: The Case for Literature Discovery in Social Sciences and Humanities. *ACM International Conference on Software and Information Engineering*.
Best Presentation Award,
- Elnahla, N., Doha, A., & McShane, L. (2017). Group Formation in Reverse Auction Service e-Commerce. *International Conference on Business & Entrepreneurship, Supply Chain Management & Information Systems*.
22nd-23rd May 2017, Alexandria, Egypt.
- Doha, A., Ghasemaghaei, M., & Hassanein, K. (2016). Group Bundling versus Traditional Bundling in e-Commerce: A Field Experiment. *Hawaii International Conference on System Sciences (HICSS)*.
Proceedings of the 49th Annual Hawaii International Conference on System Sciences HICSS, 2016.
- Doha, A., Hassaein, K., & Mahmood, K. (2015). An Electronic Clearance Marketplace Leveraging Collaborations in Supplier and Buyer Communities: A Design Science Research Study. *Hawaii International Conference on System Sciences (HICSS)*.
Proceedings of the 48th Annual Hawaii International Conference on System Sciences HICSS, 2015
- Doha, A., Biehl, M., & Mahmood, K. (2014). Framework for Evaluating Approaches to Poverty Alleviation. *Academy of Management (AOM)*.
Best paper proceedings, Social Issues in Management Division in Philadelphia, PA.
- Doha, A. (2012). The Dynamics between Imitation and Innovation within the Firm. *Academy of Management (AOM)*.
Best Paper Proceedings, Technology and Innovation Management Division. Boston, MA.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Other Presentations

Presentation

- 2020: Sprott School of Business, Carleton University, Ottawa, Canada-Ontario. "Artificial Intelligence in Business and Management"
- 2016: eTail Canada, Toronto, Canada-Ontario. "Reinventing Bundling for the Future of eTail," Invited Guest Speech, 2016 eTail Canada, Hyatt Regency Hotel, Toronto, Canada
- 2012: Ontario's Institute of Purchasing Management Association of Canada PMAC.. "Service Supply Chain: Opportunities and Challenges for Innovation and Export"

Contract or Other Research

Research Grants and Awards

Grants

- 2026 [Year 4 of 4]: Doha, A. Insight Grant (\$57,372.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]
- 2025 [Year 4 of 4]: Doha, A. Insight Grant (\$57,366.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]
- 2025 [Year 3 of 4]: Doha, A. Insight Grant (\$57,372.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]
- 2024 [Year 3 of 4]: Doha, A. Insight Grant (\$57,366.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]
- 2024 [Year 2 of 4]: Doha, A. Insight Grant (\$57,372.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council

(SSHRC). [Status: Not Funded]

2024 [Year 2 of 2]: Doha, A. Development Grants - SSHRC Bridge (\$4,996.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2023 [Year 2 of 4]: Doha, A. Insight Grant (\$57,366.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 1 of 4]: Doha, A. Insight Grant (\$57,372.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 1 of 2]: Doha, A. Development Grants - SSHRC Bridge (\$4,996.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2022 [Year 3 of 3]: Doha, A. Insight Development Grant (\$19,244.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 4]: Doha, A. Insight Grant (\$57,366.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 5 of 5]: Doha, A. & Hassanein, K., SSHRC Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). "Next Generation e-Commerce: Business Model Innovation for an Internet of Things-Enabled Economy", With Khaled Hassanein (McMaster University). [Status: Funded]

2021 [Year 2 of 3]: Doha, A. Insight Development Grant (\$19,244.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020 [Year 4 of 5]: Doha, A. & Hassanein, K., SSHRC Insight Grant (\$72,405.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). "Next Generation e-Commerce: Business Model Innovation for an Internet of Things-Enabled Economy", With Khaled Hassanein (McMaster University). [Status: Not Funded]

2020 [Year 1 of 3]: Doha, A. Insight Development Grant (\$19,244.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019 [Year 3 of 5]: Doha, A. & Hassanein, K., SSHRC Insight Grant (\$72,405.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). "Next Generation e-Commerce: Business Model Innovation for an Internet of Things-Enabled Economy", With Khaled Hassanein (McMaster University). [Status: Not Funded]

2018 [Year 2 of 5]: Doha, A. & Hassanein, K., SSHRC Insight Grant (\$72,405.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). "Next Generation e-Commerce: Business Model Innovation for an Internet of Things-Enabled Economy", With Khaled Hassanein (McMaster University). [Status: Not Funded]

2017 [Year 1 of 5]: Doha, A. & Hassanein, K., SSHRC Insight Grant (\$72,405.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). "Next Generation e-Commerce: Business Model Innovation for an Internet of Things-Enabled Economy", With Khaled Hassanein (McMaster University). [Status: Not Funded]

2015 [Year 2 of 2]: Doha, A. & Hassanein, K., Insight Development Grant (\$32,760.00 of a total grant amount of \$65,521.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). "Supply Chain Disintegration: Understanding the Dissolution of Supply Chain Social Capital,". [Status: Funded]

2015: Doha, A. University of Toronto/CANARIE Contract, Grantee, PRI-CANARIE. [Status: Funded]

2015: Doha, A. University of Toronto/CANARIE Contract (\$42,400.00), Principal Investigator, University of Toronto. [Status: Funded]

2014 [Year 1 of 2]: Doha, A. & Hassanein, K., Insight Development Grant (\$32,760.00 of a total grant amount of \$65,521.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). "Supply Chain Disintegration: Understanding the Dissolution of Supply Chain Social Capital,". [Status: Funded]

2013: Doha, A. Start-up Funds (\$5,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

Other Professional Activities

Scholarly Work in Progress

Papers Under Review

Doha, A., Elnahla, N., & McShane, L. (2018). "Social Commerce as Social Networking," Revised and resubmitted to *Journal of Retailing and Consumer Services*.

Doha, A. & Biehl, M. (2017). "Strategizing for Sustainable Poverty Alleviation," Initial submission to *Management Decision*.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2023/Fall	BUSI4331	E-Supply Chain, Technology & Management	0.5	25	Main	100%
2023/Fall	BUSI2301	Introduction to Operations Management	0.5	74	Main	100%
2023/Fall	BUSI2301	Introduction to Operations Management	0.5	77	Main	100%

2023/Fall	BUSI4607	Management of Technology and Innovation	0.5	46	Main	100%
2022/Fall	BUSI4331	E-Supply Chain, Technology & Management	0.5	29	Main	100%
2022/Fall	BUSI2301	Introduction to Operations Management	0.5	86	Main	100%
2022/Fall	BUSI2301	Introduction to Operations Management	0.5	88	Main	100%
2022/Fall	BUSI2301	Introduction to Operations Management	0.5	86	Main	100%
2022/Winter	BUSI2301	Introduction to Operations Management	0.5	80	Main	100%
2022/Winter	BUSI2301	Introduction to Operations Management	0.5	80	Main	100%
2022/Winter	BUSI2301	Introduction to Operations Management	0.5	80	Main	100%
2022/Winter	BUSI2301	Introduction to Operations Management	0.5	80	Main	100%
2021/Winter	BUSI2301	Introduction to Operations Management	0.5	74	Main	100%
2021/Winter	BUSI2301	Introduction to Operations Management	0.5	80	Main	100%
2021/Winter	BUSI2301	Introduction to Operations Management	0.5	80	Main	100%
2021/Winter	BUSI2301	Introduction to Operations Management	0.5	80	Main	100%
2020/Winter	BUSI2301	Introduction to Operations Management	0.5	80	Main	100%
2019/Fall	BUSI4607	Management of Technology and Innovation	0.5	34	Main	100%
2019/Fall	BUSI4331	E-Supply Chain, Technology & Management	0.5	35	Main	100%
2019/Fall	BUSI2301	Introduction to Operations Management	0.5	46	Main	100%
2016/Fall	BUSI4607	Management of Technology and Innovation	0.5	43	Main	100%
2016/Fall	BUSI4431	E-Supply Chain Technology & Management	0.5	33	Main	100%
2016/Fall	BUSI2301	Introduction to Operations Management	0.5	75	Main	100%
2016/Fall	BUSI2301	Introduction to Operations Management	0.5	82	Main	100%
2015/Fall	BUSI2301	Introduction to Operations Management	0.5	84	Main	100%
2015/Fall	BUSI4607	Management of Technology and Innovation	0.5	37	Main	100%
2015/Fall	BUSI4431	E-Supply Chain Technology & Management	0.5	21	Main	100%
2015/Fall	BUSI4309	Practicum in Supply Chain Management	0.5	1	Main	100%
2015/Fall	BUSI2301	Introduction to Operations Management	0.5	84	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Selected Media Appearances: Radio

2012 - All in a Day program on CBC Radio

Credentials

Skills

Languages

English: Fluent (read, write, speak) Arabic: mother tongue (read, write, speak)

Software

2020: DeepGraph. An artificial-intelligence-based literature review platform that reduces the time and effort to perform literature reviews for business and management researchers.

2014: bndler.com. An B2C online e-Commerce platform that enables collaboration among supplier communities and also among buyer communities to aggregate

supply and demand in online transactions, which is useful for revenue management applications.

2013: kwinka.com. An C2B2C online e-Commerce platform that enables consumers to group among themselves for consuming customized services and enables service providers to form groups of consumers to offer their services.

Patents/Inventions

2014 - Method and System For Bundling Heterogeneous Demand At Discount.

Curriculum Vitae - Sprott School of Business

Linda Duxbury, PhD
Full Professor - Tenured, 1990
Sprott School of Business (Management and Strategy)
Telephone: 613-520-2600 x2385
Email: linda.duxbury@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
Orcid: <https://orcid.org/0000-0001-9852-2584>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Waterloo.

Title: *Ph.D. Thesis entitled "The Relative Effects of Community Characteristics and Health Care Environment on Indian Health and Use of Health Care Facilities in the Sioux Lookout Zone"*

Master of Science. University of Waterloo.

Title: *M.A.Sc. Thesis entitled "Growth of Aspergillus Fumigatus on Insoluble Cellulotic Substances"*

Bachelor of Science. University of Waterloo.

B. EMPLOYMENT

Academic Appointments

Professor, School of Business, Carleton University (July, 1997 - Present), Ottawa, Canada-Ontario.

Associate Professor, School of Business, Carleton University (July, 1991 - July, 1997), Ottawa, Canada-Ontario.

Assistant Professor, School of Business, Carleton University (July, 1986 - July, 1991), Ottawa, Canada-Ontario.

Other Employment

Research Assistant, School of Business, University of Western Ontario (November, 1985 - June, 1986), London, Canada-Ontario.

Research Assistant, Dept. of Management Sciences, University of Waterloo (May, 1983 - August, 1984), Waterloo, Canada-Ontario.

C. PROFESSIONAL HONOURS

2022 – 2025: Chancellor's Professor, Carleton University.

2022: Carleton University Research Achievement Award, Carleton University. Recognizing Outstanding Research.

2022: Correspondence from President Gertler in appreciation of contributions, University of Toronto. Formal letter.

2021: Chancellor's Professor, Carleton University.

2021: Faculty Graduate Mentoring award, Carleton University.

2020: Chancellor's Professor, Carleton University.

2014: Research Achievement Award, Carleton University.

2012: Faculty Graduate Mentoring Award, Carleton University.

2011: MBA Best Teacher Award, Sprott School of Business.

2010: President's Award, International Personal Managers Association (IPMA). For leadership in the area of human resource management.

2010: Inaugural Visiting Distinguished Scholar, Australian Centre for Research in Employment and Work (ACREW), Faculty of Business, Monash University, Australia.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	19		20
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings		1		1
Grants - Funded (both refereed and non-refereed)	3	58		61

Totals	4	78		82

Refereed Scholarly Publications

Articles in Refereed Journals

Halinski, M., Gover, L., & Duxbury, L. (2025). When families overload careers: the critical role of family-interferes-with-work and boundary management. *Personnel Review*, 54 (1), 334-349. [A]

Article publication date: 26 November 2024

Issue publication date: 13 January 2025

Dole, G., Duxbury, L., & Bennell, C. (2024). When Value is Created but There is No Record: An Eyewitness Account of Public Value Creation in a Student Resource Officer Program. *Public Performance & Management Review*, 47 (5), 1263-1301. [B]

Published online: 15 Jul 2024

Smylie, C., Duxbury, L., & Bennell, C. (2024). Community policing during the pandemic. *Police Practice and Research*, 25, 2. [B,Other]

Duxbury, L., & Duxbury, R. (2024). But at What Cost? Healthcare Utilization of Canadian Carer-Employees. *International Journal of Environmental Research and Public Health*, 21 (12), 1686. [B,Other]

Duxbury, L., Ding, R., Stevenson, M., & Sadavoy, J. (2024). Impact of Care-Recipient Health Conditions on Employed Caregiver Well-Being: Measure Development and Validation. *Journal of Aging and Health*. [A,Other]

First published online March 15, 2024

Mejicano Quintana, Miguel A., & Duxbury, L. (2024). Not Aware or Don't Dare! The Use and Efficacy of Employer Sponsored Mental Wellbeing Programs. *Group and Organization Management*. [A]

First published online August 20, 2024

Dole, G., & Duxbury, L. (2024). Understanding and studying value as a duality. *Journal of Management History*. [B]

Smith, C., Zhang, T., Frangi, L., & Duxbury, L. (2023). Would you like to become a union leader? Analyzing leadership intentions through a generational lens. *Industrial Relations Journal*, 54, 425-444. [A]

Lancot, A., & Duxbury, L. (2023). It may be urgent but is it important? A look at home employees evaluate their emails. *Canadian Journal of Administrative Sciences*, 40 (1), 18-32. [B]

Early View Online Version of Record before inclusion in an issue
volume assigned in 2023

Duxbury, L., Smith, C., & Halinski, M. (2023). The Union Participation Construct: A Mixed-Methods Assessment. *Economic and Industrial Democracy*. [A]

DOI only

Sadavoy, J., Sajednejad, S., Duxbury, L., & Chiu, M. (2022). A Canadian national survey of informal employed caregivers of older adults with and without dementia: Work and employee outcomes. *International Journal of Social Psychiatry*, 68 (1), 183-195. [A,Other]

Article first published online: December 29, 2020 (forthcoming)

Duxbury, L., Halinski, M., & Stevenson, M. (2022). Something's gotta give: The relationship between time in eldercare, time in childcare, and employee well-being. *Journal of Aging and Health*, 34 (6-8), 1101-1116. [A,Other]

Lancot, A., & Duxbury, L. (2022). Measurement of Perceived Importance and Urgency of Email: An Employees' Perspective. *Journal of Computer-Mediated Communication*, 27 (2), 1-24. [B]

Halinski, M., & Duxbury, L. (2022). When spouses contribute at home: The impact of spouse dependent care on role overload and stress in dual-earner couples. *Community Work and Family*, 27 (1), 35-53. [C]

Volume assigned in 2024

Received 12 Oct 2021, Accepted 06 Jul 2022, Published online: 20 Jul 2022

Sadavoy, J., Sajedinejad, S., Duxbury, L., & Chiu, M. (2022). The impact on employees of providing informal caregiving for someone with dementia. *Aging & Mental Health*, 18 (5), 1-7. [A,Other]

Updated to published with DOI (2022) Received 10 Jul 2020, Accepted 31 Dec 2020, Published online: 18 Jan 2021

Lactot, A., & Duxbury, L. (2021). When everything is urgent! Mail use and employee wellbeing. *Computers in Human Behavior Reports*, 4, 100152.

Nelson, S., & Duxbury, L. (2021). Breaking the mold: Retention strategies for generations X and Y in a prototypical accounting firm. *Human Resource Development Quarterly*, 32 (2), 155-178. [B]

Forthcoming: Open access, First published: 25 November 2020; Online Version of Record before inclusion in an issue

Duxbury, L., Bardoe, A., & Halinski, M. (2021). 'Bringing the Badge home': exploring the relationship between role overload, work-family conflict, and stress in police officers. *Policing and Society*, 31 (8), 997-1016. [A,Other]

Received 15 Apr 2020, Accepted 08 Sep 2020, Published online: 21 Sep 2020

Duxbury, L., & Ormsbee, F. (2020). Does studying the past help us understand the future? An examination of the expectations of Gen X knowledge workers. *International Journal of Human Resources Management*, 36 (2), 177-192. [A]

Updated to published on January 20, 2020.

Publisher updated pub date to 2020

Published online: 02 Nov 2017

Halinski, M., Duxbury, L., & Stevenson, M. (2020). Employed Caregivers' Response to Family-Role Overload: the Role of Control-at-Home and Caregiver Type. *Journal of Business and Psychology*, 35, 99-115. [A]

Published 28 April 2019

Issue Date February 2020

Halinski, M., & Duxbury, L. (2020). Perceiving Agency in Sustainability Transitions: A Case Study of a Police-Hospital Collaboration. *Sustainability*, 12 (20). [C,Other]

Received: 10 September 2020 / Revised: 1 October 2020 / Accepted: 10 October 2020 / Published: 13 October 2020

Open access

Smith, C., & Duxbury, L. (2020). It's not just what you say, but how you say it! A case study exploring union-member communications. *Industrial Relations Journal*. [A]

Early View Online Version of Record before inclusion in an issue, First published: 20 December 2019 Published in 2020 (March 2020)

Duxbury, L. (2019). It's Not Just About Paying Your Dues: Impact of Generational Cohort on Active and Passive Union Participation. *Human Resource Management Journal*, 29 (3), 371-394. [A]

Smith, C., Gover, L., Duxbury, L., & Halinski, M. (2019). Generational Differences in the Importance, Availability, and Influence of Work-values: A Public Service Perspective. *Canadian Journal of Administrative Sciences*, 36 (2), 177-192. [B]

Updated to published on Jan 20, 2020.

First published: 23 March 2018

Stevenson, M., & Duxbury, L. (2019). Overloaded and stressed: A case study of women working in the health care sector. *Journal of Occupational Health Psychology*, 24 (3), 333-345. [A]

Updated to published on Jan 20, 2020. Advance online publication.

Smith, C., & Duxbury, L. (2019). Attitudes Towards Unions Through a Generational Cohort Lens. *Journal of Social Psychology*, 159 (2), 190-209. [B]

Halinski, M., & Duxbury, L. (2019). Workplace flexibility and its relationship with work-interferes-with-family. *Personnel Review*. [A]

Received 31 January 2019 Revised 6 June 2019 Accepted 8 June 2019 (forthcoming) Publication date: 13 November 2019

Duxbury, L., Bennell, L., Halinski, M., & Murphy, S. (2018). Change or Be Changed: Diagnosing the Readiness to Change in the Canadian Police Sector. *Police Journal: Theory, Practice and Principles*, 91 (4), 316-338.

First Published November 22, 2017. Printed in 2018.

Duxbury, L., & Gover, L. (2018). Inside the onion: Understanding what enhances and inhibits organizational resilience. *Journal of Applied Behavioral Science*, 54 (4), 447-501. [B]

Cinte, I., & Duxbury, L. (2018). Measuring the Behavioural Properties of Commitment and Resistance to Organizational Change. *Journal of Applied Behavioral Science*, 54 (2), 113-139. [B]

First Published February 20, 2018

Halinski, M., Duxbury, L., & Higgins, C. (2018). Working While Caring for Mom, Dad, and Junior Too: Exploring the Impact of Employees' Caregiving Situation on Demands, Control, and Perceived Stress. *Journal of Family Issues*, 39 (12), 3248-3275.

Gover, L., & Duxbury, L. (2018). Making sense of organizational change: Is hindsight really 20/20. *Journal of Organizational Behavior*, 39 (1), 39-51. [A+]

Duxbury, L., & Halinski, M. (2018). It's not all about Guns and Gangs: Role overload as a source of stress in police. *Policing and Society*, 28 (8), 930-946. [A,Other]

Received 11 Aug 2016, Accepted 07 Jun 2017, Published online: 22 Jun 2017. Printed in 2018. Impact factor of 1.6 (so B rating)

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Duxbury, L., Stevenson, M., & Higgins, C. (2018). Too Much To Do, Too Little Time: Role Overload and Stress in a Multi-Role Environment. *International Journal of Stress Management*, 25 (3), 250-266. [A]

Advance online publication.

Gover, L., Halinski, M., & Duxbury, L. (2016). Is it just me? Exploring perceptions of organizational culture change. *British Journal of Management*, 27 (3), 567-582. [A]

Duxbury, L., Higgins, C., & Halinski, M. (2015). Identifying the Antecedents of Work-role overload in Police Organizations. *Criminal Justice and Behavior*, 42 (4), 361-381. [B,Other]

Richards, G., & Duxbury, L. (2015). Work-Group Knowledge Acquisition in Knowledge Intensive Public-Sector Organizations: An Exploratory Study. *Journal of Public Administration Research and Theory*, 25 (4), 1247-1277. [A]

Higgins, C., Duxbury, L., & Julien, M. (2014). The Relationship Between Work Arrangements and Work-Life Conflict. *Work: A Journal of Prevention, Assessment and Rehabilitation*, 48 (1), 69-81. [C]

Duxbury, L., & Halinski, M. (2014). When More is Less: An Examination of the Relationship Between Hours in Telework and Role Overload. *Work: A Journal of Prevention, Assessment and Rehabilitation*, 48 (1), 91-103. [C]

- Duxbury, L., & Halinski, M. (2014). Dealing with the Grumpy Boomers: Re-engaging the Disengaged and Retaining Talent. *Journal of Organizational Change Management*, 27 (4), 660-676. [B]
- Duxbury, L., Higgins, C., Smart, R., & Stevenson, M. (2014). Mobile Technology and Boundary Permeability. *British Journal of Management*, 25 (3), 570-588. [A]
- Dutkiewicz, J., & Duxbury, L. (2013). Butting Heads and Headlines. *Journal of Organizational Change Management*, 26 (1), 98-116. [B]
- Gover, L., & Duxbury, L. (2013). "What you see depends on where you stand" exploring the relationship between leadership behavior and job type in health care. *Advances in Health Care Management*, 14, 35-66.
- Gover, L., & Duxbury, L. (2012). Organizational Faultlines: Social Identity Dynamics and Organizational Change. *Journal of Change Management*, 12 (11), 53-75. [C]
- Dyke, L., & Duxbury, L. (2011). The Implications of Subjective Career Success. *Journal for Labour Market Research*, 43, 219-229. [C]
- Duxbury, L., Higgins, C., & Smart, R. (2011). Elder Care and the Impact of Caregiver Strain on the Health of Employed Caregivers. *Work: A Journal of Prevention, Assessment and Rehabilitation*, 40 (1), 29-40. [C]
- Higgins, C., Duxbury, L., & Lyons, S. (2010). Coping with Overload and Stress: A Comparison of Professional Men and Women. *Journal of Marriage and Family*, 72 (2), 847-859.
- Johnson, K., & Duxbury, L. (2010). The View from the Field, A Case Study of the Expatriate Boundary Spanning Role. *Journal of World Business*, 45, 29-40. [A+]
- Lyons, S., Higgins, C., & Duxbury, L. (2010). Work Values: Development of a New Three-Dimensional Structure Based on Confirmatory Smallest Space Analysis. *Journal of Organizational Behavior*, 31, 969-1002. [A+]
- Schweitzer, L., & Duxbury, L. (2010). Conceptualizing and Measuring the Virtuality of Teams. *Information Systems Journal*, 20 (2), 267-295. [A+]
- Thesis supervisor on this topic, helped with writing and editing. Contribution: Lead author, literature review, statistical analysis and interpretation, editing of final draft for publication.

Articles in Refereed Conference Proceedings

Full Paper

- Halinski, M., & Duxbury, L. (2017). Accommodating or Overloading: An analysis of men and women (and their spouse) in dual-earner couples. *Academy of Management (AOM)*.
- Halinski, M., & Duxbury, L. (2015). Getting What You Want From Your Transorganizational Partners: Sharedness and Decision-Making. *Academy of Management (AOM)*.
- Halinski, M., & Duxbury, L. (2013). Dealing with the Grumpy Boomers: Re-engaging the Disengaged and Retaining Talent. *Ashridge International Research Conference*.
Berkhamsted, England
- Gover, L., & Duxbury, L. (2013). Looking through someone else's eyes: Exploring perceptions of organizational change. *Colloquium on Organisational Change and Development*.
Ghent, Belgium
- Halinski, M., & Duxbury, L. (2012). Towards a Measure of Work-Role Overload in Policing. *Society for Police and Criminal Psychology*.
- Halinski, M., & Duxbury, L. (2012). Sources of Police Stress. *Administrative Sciences Association of Canada (ASAC)*.
- Gover, L., & Duxbury, L. (2012). Forces of change in healthcare: A new-old way to conceptualize change. *Administrative Sciences Association of Canada (ASAC)*.
St. John's, NL
- Smart, R., & Duxbury, L. (2010). A Longitudinal Case Study of a Public Sector Change Team. *Administrative Sciences Association of Canada (ASAC)*.
Regina, Saskatchewan.

Abstract Only

- Schweitzer, L., & Duxbury, L. (2003). What do we know about Canadian teleworkers? *Administrative Sciences Association of Canada (ASAC)*, 24 (9), 176.
- Contribution: Co-author, literature review. Human Resources Division. [Abstract]

Edited Books

- Duxbury, L., & Bennell, C. (2019). *Police in schools: An evidence-based look at the use of school resource officers*. New York: NY: Routledge/Taylor and Francis.
- Duxbury, L., & Higgins, C. (2017). *Something's Got to Give: Balancing Work, Childcare and Eldercare* Rotman-UTP Publishing.

Chapters in Edited Books

- Duxbury, L., & Dole, G. (2015). Squeezed in the Middle: Balancing Paid Employment, Childcare and Eldercare. In Burke, R., Cooper, R., and Page,

K. (Eds.), *Flourishing in Life, Work and Careers* (pp. 141-168). Chettenham, U.K: Elgar Publishing. [Status: Published]

Gover, L., & Duxbury, L. (2015). Looking through someone else's eyes: Exploring perceptions of organizational change. In F. Dievernich and K. Tokarski (Eds.), *The Role of the Human Being in Organizational Change*. [Status: In Press]

Description: Bern, Switzerland: Springer.

Duxbury, L., & Smart, R. (2011). The Myth of Separate Worlds: An Exploring of How Mobile Technology has Redefined Work-family Balance. In Stephan Kaiser, Max Ringlstetter, Miguel Pina e Cunha, Doris Ruth Eikhof (Ed.), *Creating balance? International Perspectives on the Work-Life Integration of Professionals* (pp. 269-284). Springer Publications. [Status: Published]

Duxbury, L., & Gover, L. (2011). Exploring the Link Between Organizational Culture and Work-Family Conflict. In Celeste Wilderom, Mark Peterson and Neal Ashkanasy (Eds.), *Handbook for Organizational Culture and Climate, 2nd Edition* (pp. 271-290). Sage. [Status: Published]

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Smith, C. & Duxbury, L. (2015). *Generational cohort and union communication*. Canadian Industrial Relations Association Annual meeting, Montreal, Canada-Quebec.

Halinski, M. & Duxbury, L. (2015, August). *Getting What you Want From Your Transorganizational Partners: Sharedness and Decision-Making*. Academy of Management (AOM), Vancouver, Canada-British Columbia.

Halinski, M. & Duxbury, L. (2013, June). *Dealing with Grumpy Boomers: Re-engaging the Disengaged and Retaining Talent*. Ashridge International Research Conference, Berkhamsted, England, United Kingdom.

Halinski, M. & Duxbury, L. (2012, November). *Towards a Measure of Work-Role Overload in Policing*. Society for Police and Criminal Psychology, Birmingham, Alabama.

Halinski, M. & Duxbury, L. (2012, June). *Sources of Police Stress*. Administrative Sciences Association of Canada (ASAC), St. John's, Canada-Newfoundland.

Other Presentations

Invited Lecture

2013: Work-life Balance Distinguished Speaker Series, University of Chicago and Northwestern University, Evanston, Illinois. Invited Distinguished Speaker (Nov. 2013), University of Chicago and Northwestern University

Keynote Address

2017: Annual Operations Maintenance and Construction Workshop, Operations, Maintenance and Construction (OMC), Ottawa, Canada-Ontario. Ontario Association of School Business Officials

2016: Annual Schedule 2 Employers Group Conference, Toronto, Canada-Ontario. "Creative Approaches to Workplace Challenges", (Gold Sponsor: Morneau Shepell), (October 5-6, 2016).

2015: International Society of Certified Benefit Employee Specialists (ISCBES) Annual Symposium, Vancouver, Canada-British Columbia. Hyatt Regency, (August 23-26, 2015).

2015: Chartered Professionals in Human Resources Conference, Halifax, Canada-Nova Scotia. "Dealing with the Boiled Frogs: It's All About Workloads", World Trade and Convention Centre, (May 26-27, 2015).

2014: Canadian Association of Municipal Administrators Conference, Niagara Falls, Canada-Ontario. "Managing a Changing Workforce: Changing How We Manage"

2013: Annual Colleges and University Work-Life-Family Association Conference, Toronto, Canada-Ontario. June 5

2013: Organizational and Human Development Waterloo Staff Conference, Waterloo, Canada-Ontario. Invited Keynote (April 9-10, 2013). "Work-life Balance: Rhetoric versus Reality", University of Waterloo

2012: Annual Conference on Compassion Fatigue, Kingston, Canada-Ontario. "Work-life Balance: Rhetoric versus Reality", CARE4YOU (June 12-13, 2012).

Presentation

2023: University of Toronto, Toronto, Canada-Ontario. Presented to the executive team at U of T on employee wellbeing and return to work

2020: Ontario Hospital Association.

2020: Global Advantage Consulting. "Surviving/Thriving During Times of Disruption"

2020: Conference Board of Canada. Webinar: Conference Board, Resilient Leadership and Management: Leading and Managing During Times of Disruption and Crisis, September 30, 2020

2019: OHA Desjardin Speaker. OHA Desjardin Speaker (2019), The Times They are a Changing (8 talks across Ontario to hospital executives on

how to prepare for change)

2017: Building Healthier Workplaces Conference, Ottawa, Canada-Ontario. Invited Speaker (April 20, 2017). "Impact of Email in the Workplace Research Study", Carleton University.

2017: Health Care Financial Management Conference, Toronto, Canada-Ontario. Expert Speaker (Sept. 14-15, 2017). "Managing a Changing Workforce: Changing How We Manage", Ontario Hospital Association.

2017: Western Canadian Transportation Corridors and Gateways (WESTAC), Calgary, Canada-Alberta. Expert Speaker (November 6-7, 2017). "Forces of Change", 2017 Fall Member Forum.

2016: Canadian Centre for Occupational Health and Safety Forum, Vancouver, Canada-British Columbia. Expert Speaker (Feb. 29-March 1, 2016). "The Changing World of Work".

2016: Canadian Association of Chiefs of Police Research Foundation, Montreal, Canada-Quebec. Invited Presenter (March 7-9, 2016). "From Crisis to Opportunity: Using research to build safer communities".

2015: Mining Health and Safety Conference, North Bay, Canada-Ontario. Invited Guest Speaker, Workplace Safety North (300+ attendees)

2015: Summit on the Economics of Policing and Community Safety, Innovation and Partnerships, Ottawa, Canada-Ontario. Expert Speaker (March 2-4, 2015). "Police Transformation and Sustainability", Public Safety Canada.

2014: Canadian Association of Police Governance (CAPG) Conference, Halifax, Canada-Nova Scotia. Opening Plenary Speaker (August 21, 2014). "Community Safety, Police and Police Governance".

2014: Building Healthier Workplaces Conference, Ottawa, Canada-Ontario. Invited Speaker (Oct. 24, 2014). "Making Resilience a Reality: Creating an Adaptable Organizational Culture", Carleton University.

2013: Canadian Institutes of Health Research (CIHR) Work and Health Preliminary Scientific Workshop, Toronto, Canada-Ontario. Invited Expert Speaker, "Canada's Workplace Health Agenda: Where are we versus Where do we need to be?"

2013: Learning Symposium, Association of Workers Compensation Boards of Canada, Saint-John, Canada-New Brunswick. Invited Speaker (February 2013). "An Overview of Upcoming Changing in Demographics & The Economy and How Will These Changes Affect Our Business?".

2013: Asper School of Business, University of Manitoba, Winnipeg, Canada-Manitoba. Invited Speaker (Sept. 2013). "Managing Those Who Study Management".

2013: Faculty of Medicine, University of Ottawa, Ottawa, Canada-Ontario. Invited Speaker (Oct. 2013). "Caring for those who Care: Workplace Health and Change"

2013: Mining Health and Safety Conference, Sudbury, Canada-Ontario. Invited Guest Speaker, Workplace Safety North, (300+ attendees)

2013: Work-life Balance Distinguished Speaker Series, Indiana State University, Terre Haute, Indiana. Invited Distinguished Speaker (Oct. 2013)

2013: Canadian Apprenticeship Forum, Unknown, Canada. Invited Speaker (Nov. 2013), The Tsunami of Demographic Change.

2013: International Foundation of Employee Benefit Plans, San Francisco, California. Invited Speaker (November 2013).

2012: Public Service Commission, Whitehorse, Canada-Yukon.

2012: Women In Law Enforcement, Toronto, Canada-Ontario. Distinguished Speaker (Sept. 2012), "Work-life Balance".

2012: Work/Life Balance Symposium, Calgary, Canada-Alberta. Invited Speaker (April 18, 2012). "The Plight of Generation X. Calgary Public Teachers Work-Life Balance", Calgary Public Teachers

2011: Canadian Association of Police Boards Conference, Regina, Canada-Saskatchewan. Opening Plenary Speaker (August 18-20, 2011). "Work-Life Conflict and Employee Wellbeing within Canada's Police Forces"

2010: Demographic Realities and the North: Recruitment and retention in Northern Canada, Whitehorse, Canada-Yukon. Invited Speaker (2010) to data management and human resources directors

2010: Convention Connection Speakers Bureau, Malibu, California. Exclusive Speaker (June 1, 2010). "Workplace Health and Wellness", featured on YouTube with 2142 views on Oct. 17, 2017

2010: Ontario Association of Community Care Access Centres (OACCAC) Conference, Toronto, Canada-Ontario. Invited Speaker (June 13-15, 2010). "Worklife Balance".

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 2 of 2]: Duxbury, L. Research Achievement Award (\$7,500.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2024 [Year 2 of 2]: Duxbury, L. Research Agreement (\$74,250.00), Principal Investigator, PRI-Calgary Catholic Immigration Society. Calgary Catholic Immigration Society. [Status: Funded]

2024 [Year 2 of 2]: Duxbury, L. Accelerate (\$11,250.00), Principal Investigator, PRI-Mitacs. [Status: Funded]

2024 [Year 2 of 2]: Duxbury, L. Accelerate (\$25,000.00), Principal Investigator, PRI-Canadian Police Association. [Status: Funded]

2024 [Year 2 of 2]: Duxbury, L. Insight Grant (Sub-grant) (\$7,000.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council

(SSHRC). [Status: Funded]

2023 [Year 5 of 5]: Duxbury, L. Partnership, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 3 of 3]: Duxbury, L. Partnership Development Grant (\$66,649.00 of a total grant amount of \$199,947.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 2]: Duxbury, L. Research Achievement Award (\$7,500.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2023 [Year 1 of 2]: Duxbury, L. Research Agreement (\$74,250.00), Principal Investigator, PRI-Calgary Catholic Immigration Society. Calgary Catholic Immigration Society. [Status: Funded]

2023 [Year 1 of 2]: Duxbury, L. Accelerate (\$25,000.00), Principal Investigator, PRI-Canadian Police Association. [Status: Funded]

2023 [Year 1 of 2]: Duxbury, L. Accelerate (\$11,250.00), Principal Investigator, PRI-Mitacs. [Status: Funded]

2023 [Year 1 of 2]: Duxbury, L. Insight Grant (Sub-grant) (\$7,000.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 4 of 4]: Duxbury, L. Partnership, Grantee, GOV-Canadian Institute of Health Research (CIHR). [Status: Funded]

2022 [Year 4 of 5]: Duxbury, L. Partnership, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 2 of 3]: Duxbury, L. Partnership Development Grant (\$66,649.00 of a total grant amount of \$199,947.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 3 of 3]: Duxbury, L. & Ruff, K., Partnership Development Grant (\$500,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2022 [Year 3 of 3]: Duxbury, L. Partnership Development Grant (\$2,022.00), Principal Investigator, Boys and Girls Club of Ottawa. [Status: Funded]

2022 [Year 3 of 3]: Duxbury, L. Partnership Development Grant (\$1,867.00), Principal Investigator, City of Ottawa - Community and Social Services. [Status: Funded]

2022 [Year 3 of 3]: Duxbury, L. Partnership Development Grant, Principal Investigator, Federation of Citizens Associations of Ottawa. [Status: Funded]

2022 [Year 3 of 3]: Duxbury, L. Partnership Development Grant (\$240.00), Principal Investigator, Inuit Non-Profit Housing. [Status: Funded]

2022 [Year 3 of 3]: Duxbury, L. Partnership Development Grant (\$336.00), Principal Investigator, Minwaashin Lodge. [Status: Funded]

2022 [Year 3 of 3]: Duxbury, L. Partnership Development Grant (\$2,670.00), Principal Investigator, Ottawa Public Health. [Status: Funded]

2022 [Year 1 of 3]: Duxbury, L. Partnership Development Grant (\$66,649.00 of a total grant amount of \$199,947.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022: Duxbury, L. Ralph McGinn Postdoctoral Fellowship, Principal Investigator, Worksafe BC. [Status: Not Funded]

2022: Duxbury, L. Operating Grant: Emerging COVID-19 Research Gaps & Priorities (\$94,039.00 Not Funded), Principal Investigator, GOV-Canadian Institute of Health Research (CIHR). [Status: Not Funded]

2021 [Year 4 of 4]: Duxbury, L. Scottish Police Federation - Contract (\$43,125.00 of a total grant amount of \$172,500.00), Principal Investigator, Scottish Police Federation. [Status: Funded]

2021 [Year 3 of 4]: Duxbury, L. Partnership, Grantee, GOV-Canadian Institute of Health Research (CIHR). [Status: Funded]

2021 [Year 3 of 5]: Duxbury, L. Partnership, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 1 of 3]: Duxbury, L. Partnership Development Grant (\$66,649.00 of a total grant amount of \$199,947.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 2 of 3]: Duxbury, L. & Ruff, K., Partnership Development Grant (\$500,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2021 [Year 2 of 3]: Duxbury, L. Partnership Development Grant (\$2,022.00), Principal Investigator, Boys and Girls Club of Ottawa. [Status: Funded]

2021 [Year 2 of 3]: Duxbury, L. Partnership Development Grant (\$1,867.00), Principal Investigator, City of Ottawa - Community and Social Services. [Status: Funded]

2021 [Year 2 of 3]: Duxbury, L. Partnership Development Grant, Principal Investigator, Federation of Citizens Associations of Ottawa. [Status: Funded]

2021 [Year 2 of 3]: Duxbury, L. Partnership Development Grant (\$240.00), Principal Investigator, Inuit Non-Profit Housing. [Status: Funded]

2021 [Year 2 of 3]: Duxbury, L. Partnership Development Grant (\$336.00), Principal Investigator, Minwaashin Lodge. [Status: Funded]

2021 [Year 2 of 3]: Duxbury, L. Partnership Development Grant (\$2,670.00), Principal Investigator, Ottawa Public Health. [Status: Funded]

2021: Duxbury, L. Accelerate (\$33,750.00), Principal Investigator, Mitacs. [Status: Funded]

2021: Duxbury, L. Accelerate (\$11,250.00), Principal Investigator, Canadian Mental Health Association (CMHA). [Status: Funded]

2021: Duxbury, L. Grant, Principal Investigator, Canadian Mental Health Association (CMHA). [Status: Not Funded]

2021: Duxbury, L. Knowledge Synthesis Grant (\$50,000.00 Not Funded), Principal Investigator, CIHR (Canadian Institutes of Health Research). [Status: Not Funded]

2021: Duxbury, L. Partnership Engage Grant (\$24,960.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021: Duxbury, L. Contract (\$29,167.00), Principal Investigator, Royal Canadian Mounted Police. [Status: Funded]

2021: Duxbury, L. Award (\$50,000.00), Principal Investigator, National Police Federation. [Status: Funded]

2021 [Year 4 of 4]: Otchere, I. & Duxbury, L., Insight Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021: Duxbury, L. Knowledge Synthesis Grant (\$50,000.00 Not Funded), Principal Investigator, GOV-Canadian Institute of Health Research (CIHR). [Status: Not Funded]

2021: Duxbury, L. Accelerate (\$11,250.00), Principal Investigator, Canadian Police Association. [Status: Funded]

2021: Duxbury, L. Partnership Engage Grant (\$24,000.00), Principal Investigator, Canadian Mental Health Association (CMHA). [Status: Funded]

2021: Duxbury, L. Accelerate (\$33,750.00), Principal Investigator, Mitacs. [Status: Funded]

2021: Duxbury, L. Award (\$50,000.00), Principal Investigator, Canadian Police Association. [Status: Funded]

2020 [Year 3 of 4]: Duxbury, L. Scottish Police Federation - Contract (\$43,125.00 of a total grant amount of \$172,500.00), Principal Investigator, Scottish Police Federation. [Status: Funded]

2020 [Year 2 of 4]: Duxbury, L. Partnership, Grantee, GOV-Canadian Institute of Health Research (CIHR). [Status: Funded]

2020 [Year 2 of 2]: Duxbury, L. Partnership (\$29,984.00), Principal Investigator, McMaster University. [Status: Funded]

2020 [Year 2 of 5]: Duxbury, L. Partnership, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020 [Year 1 of 3]: Duxbury, L. & Ruff, K., Partnership Development Grant (\$500,000.00 of a total grant amount of \$1,500,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2020 [Year 1 of 3]: Duxbury, L. Partnership Development Grant (\$2,022.00 of a total grant amount of \$6,066.00), Principal Investigator, Boys and Girls Club of Ottawa. [Status: Funded]

2020 [Year 1 of 3]: Duxbury, L. Partnership Development Grant (\$1,867.00), Principal Investigator, City of Ottawa - Community and Social Services. [Status: Funded]

2020 [Year 1 of 3]: Duxbury, L. Partnership Development Grant, Principal Investigator, Federation of Citizens Associations of Ottawa. [Status: Funded]

2020 [Year 1 of 3]: Duxbury, L. Partnership Development Grant (\$240.00 of a total grant amount of \$720.00), Principal Investigator, Inuit Non-Profit Housing. [Status: Funded]

2020 [Year 1 of 3]: Duxbury, L. Partnership Development Grant (\$336.00 of a total grant amount of \$1,008.00), Principal Investigator, Minwaashin Lodge. [Status: Funded]

2020 [Year 1 of 3]: Duxbury, L. Partnership Development Grant (\$2,670.00 of a total grant amount of \$8,010.00), Principal Investigator, Ottawa Public Health. [Status: Funded]

2020: Duxbury, L. Accelerate (\$60,000.00), Principal Investigator, Boys and Girls Club of Ottawa. [Status: Funded]

2020: Duxbury, L. Accelerate (\$73,000.00), Principal Investigator, Mitacs. [Status: Funded]

2020: Duxbury, L. Accelerate (\$33,750.00), Principal Investigator, Mitacs. [Status: Funded]

2020: Duxbury, L. Accelerate (\$11,250.00), Principal Investigator, Canadian Police Association. [Status: Funded]

2020 [Year 3 of 4]: Otchere, I. Insight Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019 [Year 2 of 4]: Duxbury, L. Scottish Police Federation - Contract (\$43,125.00 of a total grant amount of \$172,500.00), Principal Investigator, Scottish Police Federation. [Status: Funded]

2019 [Year 1 of 4]: Duxbury, L. Partnership, Grantee, GOV-Canadian Institute of Health Research (CIHR). [Status: Funded]

2019 [Year 1 of 2]: Duxbury, L. Partnership (\$29,984.00), Principal Investigator, McMaster University. [Status: Funded]

2019 [Year 1 of 5]: Duxbury, L. Partnership, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019: Duxbury, L. Multidisciplinary Research Catalyst Fund, Collaborator, PRI-Carleton University. [Status: Funded]

2019 [Year 2 of 4]: Otchere, I. Insight Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 4 of 4]: Duxbury, L. Mount Sinai Hospital-Contract (\$44,317.00 of a total grant amount of \$177,267.00), Principal Investigator, Mount Sinai Hospital. [Status: Funded]

2018 [Year 2 of 2]: Duxbury, L. Ottawa Police Service Contract (\$30,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2018 [Year 1 of 3]: Duxbury, L. Scottish Police Federation - Contract (\$43,125.00 of a total grant amount of \$172,500.00), Principal Investigator, Scottish Police Federation. [Status: Funded]

2018 [Year 1 of 4]: Otchere, I. & Duxbury, L., Insight Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2017 [Year 3 of 4]: Duxbury, L. Mount Sinai Hospital-Contract (\$44,317.00 of a total grant amount of \$177,267.00), Principal Investigator, Mount

Sinai Hospital. [Status: Funded]

2017 [Year 1 of 2]: Duxbury, L. Ottawa Police Service Contract (\$30,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2017: Duxbury, L. Ottawa Police Service Contract (\$30,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$11,250.00 of a total grant amount of \$45,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$49,987.00 of a total grant amount of \$4,998,745,000.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$18,333.00), Principal Investigator, Calgary Police Service. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$12,500.00 of a total grant amount of \$50,000.00), Principal Investigator, Saint John Board of Police Commissioners. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$17,500.00 of a total grant amount of \$70,000.00), Principal Investigator, Staff Relations Representatives Program. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$10,500.00 of a total grant amount of \$42,000.00), Principal Investigator, Port Moody Police Department. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$17,560.00 of a total grant amount of \$70,240.00), Principal Investigator, Peel Police Services Board. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$2,250.00 of a total grant amount of \$9,000.00), Principal Investigator, Federation of Canadian Municipalities. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$3,500.00 of a total grant amount of \$14,000.00), Principal Investigator, Canadian Policing Association. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$5,750.00 of a total grant amount of \$23,000.00), Principal Investigator, Canadian Police College. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$2,625.00 of a total grant amount of \$10,500.00), Principal Investigator, Canadian Association of Police Boards. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$1,250.00 of a total grant amount of \$5,000.00), Principal Investigator, Toronto Police Services Board. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$32,620.00 of a total grant amount of \$130,480.00), Principal Investigator, Toronto Police Service. [Status: Funded]

2016 [Year 4 of 4]: Duxbury, L. Partnership Development Grant (\$2,500.00 of a total grant amount of \$10,000.00), Principal Investigator, Canadian Association of Chiefs of Police. [Status: Funded]

2016 [Year 2 of 2]: Duxbury, L. Accelerate (\$11,250.00 of a total grant amount of \$22,500.00), Principal Investigator, Peel Regional Police Services. [Status: Funded]

2016 [Year 2 of 2]: Duxbury, L. Accelerate (\$15,548.00 of a total grant amount of \$31,095.00), Principal Investigator, Mltacs. [Status: Funded]

2016 [Year 2 of 2]: Duxbury, L. Government of Alberta-Contract (\$30,000.00 of a total grant amount of \$60,000.00), Principal Investigator, Government of Alberta. [Status: Funded]

2016 [Year 2 of 4]: Duxbury, L. Mount Sinai Hospital-Contract (\$44,317.00 of a total grant amount of \$177,267.00), Principal Investigator, Mount Sinai Hospital. [Status: Funded]

2016: Duxbury, L. Ministry of Public Safety and Emergency Preparedness Agreement (\$38,200.00), Principal Investigator, Ministry of Public Safety and Emergency Preparedness. [Status: Funded]

2016: Duxbury, L. Peel Regional Police Services Agreement (\$2,500.00), Principal Investigator, Peel Regional Police Services. [Status: Funded]

2016: Duxbury, L. Research Achievement Award (\$15,000.00), Co-Principal Investigator, Carleton University, CORIS. [Status: Funded]

2016: Duxbury, L. Carleton University, Vice-President (Research and International)- Agreement (\$2,500.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2016 [Year 1 of 5]: Duxbury, L. & Ibnkahl, M., Strategic Partnership Grants for Network, Co-Investigator, GOV-Natural Sciences and Engineering Research Council of Canada (NSERC). [Status: Not Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$11,250.00 of a total grant amount of \$45,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$49,987.00 of a total grant amount of \$4,998,745,000.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$18,333.00), Principal Investigator, Calgary Police Service. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$12,500.00 of a total grant amount of \$50,000.00), Principal Investigator, Saint John Board of Police Commissioners. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$17,500.00 of a total grant amount of \$70,000.00), Principal Investigator, Staff Relations Representatives Program. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$10,500.00 of a total grant amount of \$42,000.00), Principal Investigator, Port Moody Police Department. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$17,560.00 of a total grant amount of \$70,240.00), Principal Investigator, Peel Police Services Board. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$2,250.00 of a total grant amount of \$9,000.00), Principal Investigator, Federation of Canadian Municipalities. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$3,500.00 of a total grant amount of \$14,000.00), Principal Investigator, Canadian Policing Association. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$11,250.00 of a total grant amount of \$45,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$5,750.00 of a total grant amount of \$23,000.00), Principal Investigator, Canadian Police College. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$2,625.00 of a total grant amount of \$10,500.00), Principal Investigator, Canadian Association of Police Boards. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$1,250.00 of a total grant amount of \$5,000.00), Principal Investigator, Toronto Police Services Board. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$32,620.00 of a total grant amount of \$130,480.00), Principal Investigator, Toronto Police Service. [Status: Funded]

2015 [Year 3 of 4]: Duxbury, L. Partnership Development Grant (\$2,500.00 of a total grant amount of \$10,000.00), Principal Investigator, Canadian Association of Chiefs of Police. [Status: Funded]

2015 [Year 1 of 2]: Duxbury, L. Accelerate (\$11,250.00 of a total grant amount of \$22,500.00), Principal Investigator, Peel Regional Police Services. [Status: Funded]

2015 [Year 1 of 2]: Duxbury, L. Accelerate (\$15,548.00 of a total grant amount of \$31,095.00), Principal Investigator, Mitacs. [Status: Funded]

2015: Duxbury, L. Accelerate (\$10,000.00), Principal Investigator, The Co-operators. [Status: Funded]

2015: Duxbury, L. Accelerate (\$7,500.00), Principal Investigator, Mitacs. [Status: Funded]

2015 [Year 1 of 2]: Duxbury, L. Government of Alberta-Contract (\$30,000.00 of a total grant amount of \$60,000.00), Principal Investigator, Government of Alberta. [Status: Funded]

2015 [Year 1 of 4]: Duxbury, L. Mount Sinai Hospital-Contract (\$44,317.00 of a total grant amount of \$177,267.00), Principal Investigator, Mount Sinai Hospital. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$11,250.00 of a total grant amount of \$45,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$49,987.00 of a total grant amount of \$4,998,745,000.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$18,333.00), Principal Investigator, Calgary Police Service. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$12,500.00 of a total grant amount of \$50,000.00), Principal Investigator, Saint John Board of Police Commissioners. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$17,500.00 of a total grant amount of \$70,000.00), Principal Investigator, Staff Relations Representatives Program. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$10,500.00 of a total grant amount of \$42,000.00), Principal Investigator, Port Moody Police Department. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$17,560.00 of a total grant amount of \$70,240.00), Principal Investigator, Peel Police Services Board. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$2,250.00 of a total grant amount of \$9,000.00), Principal Investigator, Federation of Canadian Municipalities. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$3,500.00 of a total grant amount of \$14,000.00), Principal Investigator, Canadian Policing Association. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$5,750.00 of a total grant amount of \$23,000.00), Principal Investigator, Canadian Police College. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$2,625.00 of a total grant amount of \$10,500.00), Principal Investigator, Canadian Association of Police Boards. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$1,250.00 of a total grant amount of \$5,000.00), Principal Investigator, Toronto

Police Services Board. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$32,620.00 of a total grant amount of \$130,480.00), Principal Investigator, Toronto Police Service. [Status: Funded]

2014 [Year 2 of 4]: Duxbury, L. Partnership Development Grant (\$2,500.00 of a total grant amount of \$10,000.00), Principal Investigator, Canadian Association of Chiefs of Police. [Status: Funded]

2014: Duxbury, L. Accelerate (\$22,500.00), Principal Investigator, Peel Regional Police Services. [Status: Funded]

2014: Duxbury, L. Accelerate (\$22,500.00), Principal Investigator, Mitacs. [Status: Funded]

2013: Duxbury, L. Health System Research Fund, Grantee, Ontario Ministry of Health and Long-term Care. [Status: Not Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$11,250.00 of a total grant amount of \$45,000.00), Principal Investigator, Ottawa Police Service. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$49,987.00 of a total grant amount of \$199,946.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$18,333.00 of a total grant amount of \$55,000.00), Principal Investigator, Calgary Police Service. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$12,500.00 of a total grant amount of \$50,000.00), Principal Investigator, Saint John Board of Police Commissioners. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$17,500.00 of a total grant amount of \$70,000.00), Principal Investigator, Staff Relations Representatives Program. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$10,500.00 of a total grant amount of \$42,000.00), Principal Investigator, Port Moody Police Department. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$17,560.00 of a total grant amount of \$70,240.00), Principal Investigator, Peel Police Services Board. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$2,250.00 of a total grant amount of \$9,000.00), Principal Investigator, Federation of Canadian Municipalities. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$3,500.00 of a total grant amount of \$14,000.00), Principal Investigator, Canadian Policing Association. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$5,750.00 of a total grant amount of \$23,000.00), Principal Investigator, Canadian Police College. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$2,625.00 of a total grant amount of \$10,500.00), Principal Investigator, Canadian Association of Police Boards. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$1,250.00 of a total grant amount of \$5,000.00), Principal Investigator, Toronto Police Services Board. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$32,620.00 of a total grant amount of \$130,480.00), Principal Investigator, Toronto Police Service. [Status: Funded]

2013 [Year 1 of 4]: Duxbury, L. Partnership Development Grant (\$2,500.00 of a total grant amount of \$10,000.00), Principal Investigator, Canadian Association of Chiefs of Police. [Status: Funded]

2013: Duxbury, L. Order of Ontario, Grantee, Ontario Ministry of Citizenship and Immigration. [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Panelist

2016: Symposium Insight and Opportunities. Human Resources in Education, Vancouver, Canada-British Columbia. Workshop Panellist (2016), "Making Change Work – Leading from the Middle", British Columbia Public School Employers' Association.

2011: Panel on Workplace Health, Thought Leaders Conference, Stanford, California. Invited Speaker (Sept. 2011) (with Jeffery Pfeffer), sponsored by Humana, Stanford University, California.

Invited Lecture

2013: Work-life Balance Distinguished Speaker Series, University of Chicago and Northwestern University, Evanston, Illinois. Invited Distinguished Speaker (Nov. 2013), University of Chicago and Northwestern University

Keynote Address

2017: Annual Operations Maintenance and Construction Workshop, Operations, Maintenance and Construction (OMC), Ottawa, Canada-Ontario. Ontario Association of School Business Officials

2016: Annual Schedule 2 Employers Group Conference, Toronto, Canada-Ontario. "Creative Approaches to Workplace Challenges", (Gold Sponsor:

Morneau Shepell), (October 5-6, 2016).

2015: International Society of Certified Benefit Employee Specialists (ISCBES) Annual Symposium, Vancouver, Canada-British Columbia. Hyatt Regency, (August 23-26, 2015).

2015: Chartered Professionals in Human Resources Conference, Halifax, Canada-Nova Scotia. "Dealing with the Boiled Frogs: It's All About Workloads", World Trade and Convention Centre, (May 26-27, 2015).

2014: Canadian Association of Municipal Administrators Conference, Niagara Falls, Canada-Ontario. "Managing a Changing Workforce: Changing How We Manage"

2013: Annual Colleges and University Work-Life-Family Association Conference, Toronto, Canada-Ontario. June 5

2013: Organizational and Human Development Waterloo Staff Conference, Waterloo, Canada-Ontario. Invited Keynote (April 9-10, 2013). "Work-life Balance: Rhetoric versus Reality", University of Waterloo

2012: Annual Conference on Compassion Fatigue, Kingston, Canada-Ontario. "Work-life Balance: Rhetoric versus Reality", CARE4YOU (June 12-13, 2012).

Other Professional Service Activities

2020: Social Sciences and Humanities Research Council. Reviewer's judging panel: SSHRC's Skills and Work in the Digital Economy Knowledge Synthesis Grant

2020: Canadian Mental Health Association. Conducted weekly interviews held in Summer 2020 for 10 consecutive weeks, two studies in partnership with the Canadian Mental Health Association

Scholarly Work in Progress

Working Papers

Anderson, T., Stevenson, M., & Duxbury, L. (2017). "Organizational Climate and Perceived Readiness for Change."

Description: Data collected and analyzed, paper in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	MGMT5100	Managing People & Organizations	0.5	24	Shanghai	100%
2023/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	21	Main	100%
2023/Fall	MGMT5100	Managing People & Organizations	0.5	15	Main	100%
2022/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	23	Main	100%
2022/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	23	Main	100%
2022/Fall	MGMT5100	Managing People & Organizations	0.5	40	Shanghai	100%
2022/Fall	MGMT5100	Managing People & Organizations	0.5	17	Main	100%
2022/Fall	MGMT5100	Managing People & Organizations	0.5	22	Main	100%
2022/Fall	MGMT5100	Managing People & Organizations	0.5	17	Main	100%
2022/Fall	BUSI6104	Managing the Change Process	0.5	7	Main	100%
2021/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	8	Main	100%
2021/Fall	MGMT5100	Managing People & Organizations	0.5	30	Main	100%
2021/Fall	MGMT5100	Managing People & Organizations	0.5	21	Main	100%
2021/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	22	Main	100%
2021/Fall	MGMT5100	Managing People & Organizations	0.5	29	Main	100%
2021/Summer	MGMT5100	Managing People & Organizations	0.25	34	Main	100%
2021/Summer	MGMT5100	Managing People & Organizations	0.25	28	Main	100%
2021/Winter	MGMT5100	Managing People & Organizations	0.25	31	Shanghai	100%
2021/Winter	MGMT5100	Managing People & Organizations	0.25	28	Shanghai	100%
2020/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	24	Main	100%

2020/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	9	Main	100%
2020/Fall	MGMT5100	Managing People & Organizations	0.5	25	Main	100%
2020/Fall	BUSI6104	Managing the Change Process	0.5	5	Main	100%
2019/Fall	MGMT5100	Managing People & Organizations	0.5	27	Main	100%
2019/Fall	MGMT5100	Managing People & Organizations	0.5	25	Main	100%
2019/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	21	Main	100%
2019/Fall	MGMT5100	Managing People & Organizations	0.5	33	Main	100%
2019/Fall	MGMT5100	Managing People & Organizations	0.5	27	Main	100%
2019/Winter	MGMT5100	Managing People & Organizations	0.25	43	Shanghai	100%
2018/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	14	Main	100%
2018/Fall	MGMT5100	Managing People & Organizations	0.5	25	Main	100%
2018/Fall	MGMT5100	Managing People & Organizations	0.5	35	Main	100%
2018/Fall	BUSI6104	Managing the Change Process	0.5	4	Main	100%
2018/Summer	MGMT5100	Managing People & Organizations	0.5	17	Bogota	100%
2018/Summer	MGMT5100	Managing People & Organizations	0.25	30	Shanghai	100%
2018/Summer	MGMT5100	Managing People & Organizations	0.25	19	Shanghai	100%
2017/Fall	MGMT5100	Managing People & Organizations	0.5	34	Main	100%
2017/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	23	Main	100%
2017/Fall	MGMT5100	Managing People & Organizations	0.5	34	Main	100%
2017/Summer	MGMT5100	Managing People & Organizations	0.5	28	Bogota	100%
2017/Winter	MGMT5100	Managing People & Organizations	0.5	43	Shanghai	100%
2016/Fall	BUSI6104	Managing the Change Process	0.5	4	Main	100%
2016/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	12	Main	100%
2016/Fall	MGMT5100	Managing People & Organizations	0.5	32	Main	100%
2016/Fall	MGMT5100	Managing People & Organizations	0.5	35	Main	100%
2016/Summer	MGMT5100	Managing People & Organizations	0.5	9	Bogota	100%
2016/Summer	MGMT5100	Managing People & Organizations	0.5	31	Shanghai	100%
2016/Summer	BUSI6901	Qualitative Research Design	0.5	4	Main	100%
2016/Winter	MGMT5100	Managing People & Organizations	0.5	33	Shanghai	100%
2015/Fall	MGMT5100	Managing People & Organizations	0.5	26	Main	100%
2015/Fall	MGMT5120	Fundamentals of Leading & Managing Organizational Change	0.5	23	Main	100%
2015/Fall	MGMT5100	Managing People & Organizations	0.5	21	Bogota	100%
2015/Fall	MGMT5100	Managing People & Organizations	0.5	27	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2021-2022: Cohen, J., MA External Examiner

PhD. Comprehensive Committees:

2018-2019: Internal External Examiner on PhD, Karen Rankins

External Committees**Thesis Assignments****PhD. Comprehensive Committees:**

2023-2024: PhD External Examiner - Beedie School of Business

G. ADMINISTRATIVE RESPONSIBILITIES**Service to the Institution (Administrative)****Carleton University****Faculty Assignments****Chair:**

2017-2018: Tenure and Promotion Committee - Departmental (Cluster I)

2017-2018: Hiring Committee - Management and Strategy Faculty

2015-2016: Departmental Tenure and Promotion Committee (Cluster I)

H. OTHER**Selected Media Appearances: Online**

2013 - "Human Resources & Work-Life Balance", K&M Productions : Featured on Youtube with 1626 views on Jan. 11, 2018.

Selected Media Appearances: Television

2017 - The Voice of America : Presentation on her recent book "Something's Got to Give" about the challenges of balancing work and caregiving on the episode How Caregivers and Employees Can Achieve a Better Work-Life Balance Together hosted by Dr. Merle Griff

2010 - CBC in Mounties Under Fire, Helen Slinger : Jan. 21, 2010: Featured in an interview on CBC in Mounties Under Fire, a documentary written and directed by Helen Slinger (Bountiful Films) about the RCMP in a time of crisis following a series of high-profile events relating to workload, use of force, recruitment and other organizational issues.

2010 - CBC TV, Crackberry'd: The Truth About Information Overload, directed by Andrew Blicq : Featured in the CBC TV episode Crackberry'd: The Truth About Information Overload, directed by Andrew Blicq, which "takes a hard look at how computers and the latest cell phone technology affect our families and our co-workers in addition to our own lives".

Other Activities

2011 - Expert Speaker before the Alberta Solicitor General : Expert Speaker on "Attracting, Motivating and Retaining Talent", Edmonton (March)

Selected Media Appearances: Online

2019 - Harvard Business Review Podcast Entitled "How to Make Part Time Work for You

2020 - Working well at home takes, well, work, experts say, CBC News

2020 - • Neighbourhood Watch: Amid a Devastating Health Crisis and Rising Racial Tension, Carleton Researchers Are Evaluating Ottawa's New Community Policing Project, Raven Magazine

2020 - CBC Ottawa with Adrian Harewood

2020 - National Post Radio with Anthony Furey

2020 - SSHRC Series : inaugural talk

2021 - One in three Police Scotland officers have gone on duty while 'mentally unwell'-The Scotsman (Scotland)

2021 - Growing mental health crisis in Scottish policing revealed in new study-The National (Scotland)

2021 - Frontline police officers suffering 'chronic stress', experts warn - Glasgow Times (Scotland)

2021 - Police Scotland faces mental health crisis as half of officers experience work burnout- Daily Record (Scotland)

2021 - Officers with Police Scotland are overworked, stressed and burning out - The Times (Scotland)

2021 - 'Covid is bringing the frontline to its knees': Survey suggests Police Scotland officers are stressed and close to burnout - The Herald (Scotland)

Selected Media Appearances: Television

2021 - Ontario proposes right-to-disconnect legislation for workers

Selected Media Appearances: Online

2021 - What if it were against the law for your boss to bug you after hours?

Selected Media Appearances: Radio

2021 - Phone interview: 630 CHED and 770 CHQR

Selected Media Appearances: Online

2022 - Examining Motivation of Companies to Adopt Caregiver Friendly Policies

2022 - CBC mention

2022 - Proceed with caution: Why adaptive leadership is key to the new world of work

2022 - The myth of having it all: Carleton women leaders talk careers, expectations and privilege

2022 - Egan: On police recruitment -- "Why would anyone want to be a cop right now?"

2022 - Remote, hybrid work creating schism as popular option unavailable to many workers

2022 - We Haven't Proved Anything About Remote Work in the Last Two Years

2022 - Remote, hybrid work creating schism as popular option unavailable to many workers

2022 - CBC All in a Day

2022 - Work-life balance has been decimated during the pandemic – can we get it back?

2023 - Government should study productivity impact of public servants working from home, says PBO

Selected Media Appearances: Print

2023 - Globe and Mail: Back-to-office plans fall flat over a lack of communication

Selected Media Appearances: Online

2021 - Modernizing work : IRPP Podcast

Credentials

Research Reports

2012: Duxbury, L., Higgins, C., & Lyons, S., The Etiology and Reduction of Role Overload in Canada's Health Care Sector., submitted to Workplace, Safety and Insurance Board.

2012: Duxbury, L., & Higgins, C., Caring for and about those who serve: Work-life conflict and employee well-being within Canada's Police Departments., submitted to Human Resources Development Canada.

Curriculum Vitae - Sprott School of Business

Nusa Fain, PhD
Assistant Professor - Preliminary - Tenure Track
Sprott School of Business (Entrepreneurship)
Telephone:
Email: NusaFain@cunet.carleton.ca
AACSB Qualification: Practice Academic (PA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Ljubljana.
Postgraduate Certificate in Higher Education. University of Strathclyde.
Bachelor of Science. Faculty of Social Sciences, University of Ljubljana.

B. EMPLOYMENT

Academic Appointments

Assistant Professor, Sprott School of Business, Carleton University (August, 2023 - Present), Ottawa, Canada-Ontario.
Adjunct Professor, Smith School of Business, Queen's University (August, 2018 - Present), Kingston, Canada-Ontario.
School Manager/Director, Smith School of Business (April, 2021 - July, 2023), Kingston, Canada-Ontario.
Assistant Professor, Strathclyde Business School, University of Strathclyde (September, 2012 - August, 2018), Glasgow, Scotland.

Other Employment

Commercialization Analyst/Howden Industrial Fellow, School of Engineering and Mathematical Sciences, City University London (2011 - 2012), London, United Kingdom.
Researcher, Faculty of Mechanical Engineering, University of Ljubljana (2010 - 2011), Ljubljana, Slovenia.
Young Researcher, Faculty of Mechanical Engineering, University of Ljubljana (2006 - 2010), Ljubljana, Slovenia.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Publications in Conference Proceedings (Refereed)		3		3
Grants - Funded (both refereed and non-refereed)		1		1
Totals		4		4

Refereed Scholarly Publications

Articles in Refereed Journals

Fain, N., & Silva, T. (2024). Knowledge Management Practice and Organizational Performance in the Context of International Schools. *International Journal of Knowledge Management Studies*. [C]
Fain, N., Wagner, B., & kay, N.M. (2018). Driving innovation through service provision – long life cycle products in manufacturing contexts. *Technological Forecasting and Social Change*. [A]
Fain, N., & Wagner, B. (2018). Regulatory influences on innovation in the public sector: the role of regulatory regimes. *Public Management Review*. [A]
Fain, N., & Wagner, B. (2014). R&D-marketing integration in innovation – does culture matter. *European Business Review*. [B]
Fain, N., Schoormans, J., & Duhovnik, J. (2011). The effect of R&D-marketing integration on NPD success - The case of SMEs in the growing economy of Slovenia. *International Journal of Technology Management*. [B]

Articles in Refereed Conference Proceedings

Full Paper

Tachtampa, C., Araujo Redbird, J., & Fain, N. (2021). Indigeneity in entrepreneurship: Exploring the role of Indigenous knowledge in building

sustainable entrepreneurial practices for First Nations. *Asper School of Business*.

Inaugural Research Conference, , March 18 & 19, 2021

Fain, N., Rod, M., & Bohemia, E. (2019). Entrepreneurial Mindset: a longitudinal study of three different teaching approaches to developing it. *Academy of Design innovation Management Conference*.

London, UK

Fain, N., & Vukasinovic, N. (2019). Entrepreneurial Mindset Development in business and engineering education – an experiment. *International Design Conference*.

Proceedings of Design 2020. Zagreb, Croatia.

Canik, Y., Fain, N., Bohemia, E., Telabasic, I., & Tewes, V. (2018). Integrating individual knowledge into innovation processes of R&D alliances. *International Design Conference*.

1805- 1814. 10.21278/idc.2018.0238

Fain, N., Wagner, N., & Kay, B. (2017). Bespoke innovation: filling the gap between classic and user-centered open innovation. *Design Management Academy*.

Hong Kong, China

Grant, D.A., Russell, G., Wagner, B., & Fain, N. (2016). Optimising the process of product development by collaborating and thinking visually – Co-creation within Howden. *International Design Conference*.

Fain, N., Vukasinovic, N., & Zavbi, R. (2016). The influence of product complexity on team performance within NPD. *International Design Conference*.

Fain, N., Wagner, B., & Lemke, F. (2015). Exploring collaboration in product development. *Academic Design Management Conference*.

Fain, N., Wagner, B., & Vukasinovic, N. (2015). A project-based approach to learning: comparative study of two disciplines. *Learn x Design = PreK-16 Education conference*.

Grant, D., Fain, N., Wagner, B., & Kay, N. (2015). Open innovation and the view from both ends of the bridge: a case study in new product development. *World Open Innovation Conference*.

Kay, N., Fain, N., & Wagner, B. (2015). Exploring inside-in open innovation: a case study. *World Open Innovation Conference*.

Other (Non-refereed) Scholarly Publications

Articles in non-Refereed journals

Applied or Integrative/application Scholarship

Fain, N., Kline, M., & Duhovnik, J. (2011). Integrating R&D and Marketing in New Product Development. *Journal of Mechanical Engineering*.

Baric, A., Jelovac, D., & Fain, N. (2013). Barriers in multicultural business communication: an empirical study of Slovenia and Bosnia and Herzegovina. *Innovative Issues and Approaches in Social Sciences*.

Zavbi, R., Fain, N., & Rihtarsic, J. (2013). Evaluation of a method and a computer tool for generating concept designs. *Journal of Engineering Design*.

Fain, N., & Kline, M. (2013). The dynamics of multicultural NPD teams in virtual environments. *Journal of Technology and Design Education*.

Cok, V., Fain, N., Vukasinovic, N., & Zavbi, R. (2015). 'Multicultural Issues of Product Development Education in Virtual Teams. *International Journal of Engineering Education*.

Fain, N., Vukasinovic, N., & Wagner, B. (2016). A project-based approach to learning: comparative study of two disciplines. *Design and Technology Education: An International Journal*.

Basic or Discovery Scholarship

Zavbi, R., Fain, N., & Rihtarsic, J. (2016). Using Computer Generated Design Aids to Facilitate Alternative Concept Embodiments. *International Journal of Engineering Education*.

Articles in non-refereed conference proceedings

Applied or Integrative/application Scholarship

Muhos, M., Wagner, B., Fain, N., & Saarela, M. (2018). Exploring the early stages of growth in a Slovenian Health-Technology startup. *European Conference on Innovation and Entrepreneurship*.

Portugal

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Huang, L., Wagner, B., & Fain, N. (2016). *Open innovation adoption from strategy to practice: implications from organizational ambidexterity and dynamic capabilities*. Annual World Open Innovation Conference, Hong Kong, China.

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 2 of 2]: Fain, N. Partnership Engage Grant (\$12,497.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 2]: Fain, N. Partnership Engage Grant (\$12,497.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Chair: Conference / Track / Program

2008 – 2024: International Design Conference. Scientific Advisory Board and Track Chair

Reviewer: Ad Hoc Reviewer for a Journal

2023: European Business Review.

2023: Creativity and Innovation Management Journal,.

2023: Journal of Engineering Design.

2023: Journal of Marketing Management.

2023: Journal of Product Innovation Management.

Reviewer: Conference Paper

2010 – 2023: Engineering and Product Design Education Conference. International scientific review board

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	24	Main	100%
2024/Winter	TIMG5001	Principles of Technology Innovation Management	0.5	53	Main	100%
2023/Fall	TIMG5205	Customer Value Creation in Technology Firms	0.5	54	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: Early Research Career committee (Co-Chair)

H. OTHER

Selected Media Appearances: Online

2021 - What makes an innovative small business? : Women of Influence (2021)

2023 - How generative-AI tools save this growing company time and money : Globe and Mail (2023): How generative-AI tools save this growing company time and money

2022 - Experts weigh in on what tech companies can do to grow amid downturn : The Canadian Press (2022): Experts weigh in on what tech companies can do to grow amid downturn

2022 - Pros And Cons Of Starting A Side Hustle: The Expert Opinion : Canadian SME Magazine (2022): Pros And Cons Of Starting A Side Hustle: The Expert Opinion

2022 - Making the Side Hustle Work : Smith Business Insight (2022): Making the Side Hustle Work

2022 - TEAMS WORK: Innovating Teams : Smith Business Insight Podcast: TEAMS WORK: Innovating Teams

Credentials

Curriculum Vitae - Sprott School of Business

Samira Farivar, PhD
Assistant Professor - Preliminary - Tenure Track
Sprott School of Business (Information Technology/Information Systems)
Telephone: 613-530-2600 x2383
Email: samira.farivar@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-0661-0569>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. McMaster University.

Title: *Research Topic: Biases in Online User Behaviors Supervisor: Dr. Yufei Yuan Thesis Proposal Defense Date: September 2017*

Master of Science. Amirkabir University of Technology.

Title: *Minor: Financial Engineering Thesis: "Fuzzy Type 2 modeling for risk assessment in stock market" Supervisor: Dr. Fazel Zarandi*

Bachelor of Science. Sharif University of Technology.

Professional Certifications

SAP Associate, 2017

What is BPM, 2014

ISO 10002:2004 and ISO/TS 10004:2010, 2012

ISO 9001:2008 Essential & Internal Auditor, 2011

B. EMPLOYMENT

Academic Appointments

Assistant Professor, Sprott School of Business, Carleton University (January, 2019 - Present), Ottawa, Canada-Ontario.

University Lecturer, System Analysis and Design, DeGroote School of Business, McMaster University (January, 2017 - April, 2018), Hamilton, Canada-Ontario.

Other Employment

Research Assistant, DeGroote School of Business, McMaster University (January, 2014 - 2018), Hamilton, Canada-Ontario.

Teaching Assistant, DeGroote School of Business, McMaster University (January, 2014 - 2017), Hamilton, Canada-Ontario.

Project Administration Officer, Iran Info-Tech Development Company (2010 - 2011), Tehran, Iran.

C. PROFESSIONAL HONOURS

2022: Outstanding Reviewer Award, Internet Research journal.

2017: International Tuition Bursary, McMaster University.

2017: Summer Research Scholarship, DeGroote School of Business.

2017: University Graduate Scholarship, McMaster University.

2017: Academic Leadership Award, DeGroote School of Business.

2016: International Tuition Bursary, McMaster University.

2016: Summer Research Scholarship, DeGroote School of Business.

2016: University Graduate Scholarship, McMaster University.

2016: Ontario Graduate Scholarship, McMaster University.

2015: International Tuition Bursary, McMaster University.

2015: Summer Research Scholarship, DeGroote School of Business.

2015: University Graduate Scholarship, McMaster University.

2015: International Excellence Award, McMaster University.

2014: International Tuition Bursary, McMaster University.

2014: Summer Research Scholarship, DeGroote School of Business.

2014: University Graduate Scholarship, McMaster University.

2011 – 2012: Full Graduate Scholarship, Amirkabir University of Technology,.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	5		6
Articles-in-Progress (All)		13		13
Publications in Conference Proceedings (Refereed)	2	6		8
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings		1		1
Paper Presentations (Refereed)		5		5
Grants - Funded (both refereed and non-refereed)	3	2		5
Other Research, Non-refereed	1			1
Totals	7	32		39

Refereed Scholarly Publications

Articles in Refereed Journals

Dabiran, E., Farivar, S., Wang, F., & Grant, G. (2024). Virtually Human: Anthropomorphism in Virtual Influencer Marketing. *Journal of Retailing and Consumer Services*, 79. [A]

Farivar, S., Wang, F., & Turel, O. (2024). Unraveling threats in parasocial relationships: a study on social media influencers. *Internet Research*. [A]

Farivar, S., Wang, F., & Yuan, Y. (2023). Influencer Marketing: A Perspective of the Elaboration Likelihood Model of Persuasion. *Journal of Electronic Commerce Research*. [B]

Farivar, S., & Wang, F. (2022). Effective Influencer Marketing: A Social Identity Perspective. *Journal of Retailing and Consumer Services*, 67, 103026. [A]

Farivar, S., Wang, F., & Turel, O.. (2022). Followers' problematic engagement with influencers on social media: An attachment theory perspective. *Computers in Human Behavior*, 133, 107288. [A]

Featured in the Elsevier Research Selection Newsletter.

Farivar, S., Golmohammadi, A., & Ramirez, A. (2022). Analytics Capability and Firm Performance in Supply Chain Organizations: The Role of Employees' Analytics Skills. *Analytics*, 1 (1), 1-14. [C,Other]

Farivar, S., Wang, F., & Yuan, Y. (2021). Opinion leadership vs. para-social relationship: Key factors in influencer marketing. *Journal of Retailing and Consumer Services*, 59, 102371. [A]

Published in 2021, 2022 update

Available online 23 November 2020, 102371 In Press, Corrected Proof

Farivar, S., Abouzahra, M., & Ghasemaghahi, M. (2020). Wearable device adoption among older adults: a mixed-methods study. *International Journal of Information Management*, 55. [A+]

Farivar, S., Turel, O., & Yuan, Y. (2018). Skewing Users' Rational Risk Considerations in Social Commerce: An Empirical Examination of the Role of Social Identification. *Information and Management*, 55 (8), 1038-1048. [A+]

Golmohammadi, A., Taghavi, M., Farivar, S., & Azad, N. (2018). Three strategies for engaging a buyer in supplier development efforts. *International Journal of Production Economics*, 206, 1-14. [A]

Farivar, S., Turel, O., & Yuan, Y. (2017). A Trust-Risk Perspective on Social Commerce Use: An Examination of the Biasing Role of Habit. *Internet Research: Electronic Networking, Applications and Policy*, 27 (3), 566-607. [A]

Articles in Refereed Conference Proceedings

Full Paper

Yin, G., Pei, Y., Farivar, S., Wang, F., & Wang, S. (in press, 2025). Virtual Influencer Marketing: From Social Identification to Parasocial Relationship. *Hawaii International Conference on System Sciences (HICSS)*.

Farivar, S., & Wang, F. (in press, 2025). Introduction to the Minitrack on Social Media Influencers and Influencing. *Hawaii International Conference on System Sciences (HICSS)*.

Farivar, S., Wang, F., & Wang, W. (2024). Introduction to the Minitrack on Social Media Influencers and Influencing. *Hawaii International Conference on System Sciences (HICSS)*.

Farivar, S., Wang, F., & Turel, O. (2024). Do You See Harm in Your Social Media Influencer Engagement? The Mechanism of Perceived Threat. *Hawaii International Conference on System Sciences*.

- Dabiran, E., Farivar, S., Wang, F., & Grant, G. (2023). Engaging with virtual influencers: A netnography study. *European Conference on Information Systems (ECIS)*.
- Golmohammadi, A., Taghavi, M., & Farivar, S. (2022). Improving Supplier Social Responsibility in A Competitive Market. *CORS/INFORMS International Conference*.
- Li, Y., Wang, F., & Farivar, S. (2022). Personal branding of live streamers: A value perspective. *Administrative Science Association of Canada*.
- Dabiran, E., Wang, F., & Farivar, S. (2022). Virtual Influencer Marketing: Anthropomorphism and ITS Effect. *European Conference on Information Systems*.
- Farivar, S., Wang, F., & Turel, O. (2022). Better or Worse: Responding to Problematic Engagement with Social Media Influencers. *Proceedings of International Conference on Information Systems*.
- Farivar, S., Wang, F., & Yuan, Y. (2019). Micro-Celebrities on Instagram: How Do They Influence Follower's Decisions. *Administrative Sciences Association of Canada (ASAC)*.
- Farivar, S., Wang, F., & Yuan, Y. (2019). Meformer vs. Informer: Influencer type and Follower Behavioral Intentions. *American Conference on Information Systems*.
- Farivar, S., Golmohammadi, A., & Ramirez, A. (2019). Looking at Prescriptive Analytics: Bringing Supply Chain Management models into Business Analytics. *Administrative Sciences Association of Canada*.
- ASAC2019 – the Administrative Sciences Association of Canada's Annual Meeting – IS Division, St. Catherine's, Ontario. May
- Farivar, S., & Yuan, Y. (2017). Understanding Consumers' Impulse Buying Behavior in Social Commerce Platforms. *American Conference on Information Systems*.
- Farivar, S., & Yuan, Y. (2016). Measuring Users' Privacy Concerns in Social Networking Sites. *International Conference on Information Systems*.
- Alashoor, T., Lambert, L., & Farivar, S. (2016). A Review of Measures of Disclosure Outcomes in the IS Privacy Literature. *American Conference on Information Systems*.
- Farivar, S., Yuan, Y., & Turel, O. (2016). Understanding Social Commerce Acceptance: The Role of Trust, Perceived Risk, and Benefit. *American Conference on Information Systems*.
- Farivar, S., Yuan, Y., & Turel, O. (2016). Biases in Social Commerce Users' Rational Risk Considerations. *International Conference on Information Systems*.
- Farivar, S., & Yuan, Y. (2015). Understanding Users' Motivations for Using Privacy Settings to Cope with Privacy Threats in Social Networking Sites: An Empirical Study. *International Conference on Information Systems*.
- Fourteen Annual Workshop on HCI Research in MIS, ICIS Conference
- Farivar, S., & Yuan, Y. (2014). The Dual Perspective of Social Commerce Adoption. *International Conference on Information Systems*.
- Proceedings of the Thirteenth Annual Workshop on HCI Research in MIS, ICIS Conference
- Fazel, Z., Farivar, S., & Turksan, I.B. (2013). A Supervised Fuzzy Network Analysis for Risk Assessment in Stock Markets: An ANFIS Approach. *International Fuzzy Systems Association World Congress*.

Chapters in Edited Books

- Farivar, S., & Wang, F. (2021). Influencer Marketing: Current Knowledge and Research Agenda. In Francisco J. Martínez-López and Steven D'Alessandro (Eds.), *Advances in Digital Marketing and eCommerce* (pp. 201-208). Springer. [Status: Published]

Other (Non-refereed) Scholarly Publications

Articles in non-Refereed journals

Applied or Integrative/application Scholarship

- Eshghi, K., & Farivar, S. (2024). The Addition of New Payment Method and Shareholder Value: Evidence from Cryptocurrency Adoption. *Journal of Organizational Computing and Electronic Commerce*.

Other Scholarly Publications

- 2022: Farivar, S., Golmohammadi, A., & Ramirez, A., *Development of Analytics Capability in Supply Chain Organizations*.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Conference Proceedings

- 2021: Administrative Sciences Association of Canada (National). Co-Editor, Information Systems Division, Administrative Sciences Association of Canada
- 2021: Administrative Sciences Association of Canada (National). Co-Editor, Information Systems Division

Presentations

Papers Presented at Conferences

Refereed

- Farivar, S. (2024). *Do You See Harm in Your Social Media Influencer Engagement? The Mechanism of Perceived Threat*. Hawaii International

Conference on System Sciences (HICSS), Honolulu, Hawaii.

Farivar, S. (2023). *Engaging with virtual influencers: A netnography study*. ECIS, Kristiansand, Norway.

Farivar, S. (2022). *Better or Worse: Responding to Problematic Engagement with Social Media Influencer*. Association for Information Systems ICIS, Copenhagen, Denmark.

Farivar, S. & Grant, G. (2021). *The Impact of News and Social Media Sentiments on Cryptocurrency Market*. Administrative Sciences Association of Canada (ASAC), Virtual, Virtual.

Farivar, S. (2019). *Micro-Celebrities on Instagram: How Do They Influence Follower's Decisions*. Administrative Sciences Association of Canada (ASAC), Ottawa, Canada-Ontario.

Farivar, S. (2019). *Business Analytics in Supply Chain Management: The Role of Supply Chain Complexity and Information Sharing*. Administrative Sciences Association of Canada (ASAC), Ottawa, Canada-Ontario.

Farivar, S. & Yuan, Y. (2017). *Impulse Buying Behavior in Social Commerce*. Institute for Operations Research and Management Sciences (INFORMS) International Conference, Houston, Texas.

Farivar, S. (2017). *Understanding Consumers' Impulse Buying Behavior in Social Commerce Platforms*. American Conference on Information Systems (AMCIS), Boston, Massachusetts.

Farivar, S. (2016). *Understanding Social Commerce Acceptance: The Role of Trust, Perceived Risk, and Benefit*. International Conference on Information Systems (ICIS), Fort Worth, Texas.

Farivar, S. (2016). *Biases in Social Commerce Users' Rational Risk Considerations*. International Conference on Information Systems (ICIS), Dublin, Ireland (Northern).

Farivar, S. (2015). *Measuring Users' Privacy Concerns in Social Networking Sites*. International Conference on Information Systems (ICIS), Fort Worth, Texas.

Farivar, S. (2014). *The Dual Perspective of Social Commerce Adoption*. International Conference on Information Systems (ICIS), Auckland, New Zealand.

Other Presentations

Invited Lecture

2014: McMaster University, Hamilton, Canada-Ontario. "Project Planning Using Microsoft Project Software", K736 MBA Course (Management Issues in eHealth)

2014: McMaster University, Hamilton, Canada-Ontario. "Integration of Business Processes in SAP ERP", K603 MBA Course (Information Systems in Business) Guest Lecturer, McMaster University

Presentation

2019: Research Seminar, Sprott School of Business, Ottawa, Canada-Ontario.

2017: DeGroote IS Lunch and Learn, McMaster University, Hamilton, Canada-Ontario. "Human Biases in Decision Making"

Contract or Other Research

Research Grants and Awards

Grants

2029 [Year 7 of 7]: Farivar, S. Insight Grant (\$27,001.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2028 [Year 6 of 7]: Farivar, S. Insight Grant (\$27,001.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2027 [Year 5 of 7]: Farivar, S. Insight Grant (\$27,001.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2026 [Year 4 of 7]: Farivar, S. Insight Grant (\$27,001.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2025 [Year 3 of 7]: Farivar, S. Insight Grant (\$27,001.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 2 of 2]: Farivar, S. Insight Development Grant (sub-grant) (\$12,500.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 2 of 7]: Farivar, S. Insight Grant (\$27,001.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 2]: Farivar, S. Insight Development Grant (sub-grant) (\$12,500.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 7]: Farivar, S. Insight Grant (\$27,001.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC).

[Status: Funded]

2021 [Year 2 of 2]: Farivar, S. Insight Development Grant (\$31,037.00 of a total grant amount of \$62,074.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020 [Year 2 of 2]: Farivar, S. Start-up Funds (\$5,000.00 of a total grant amount of \$10,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2020: Farivar, S. Internal (\$9,735.00), Principal Investigator, CuResearch Development Grant - SSHRC Explore. [Status: Funded]

2020 [Year 1 of 2]: Farivar, S. Insight Development Grant (\$31,037.00 of a total grant amount of \$62,074.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019 [Year 1 of 2]: Farivar, S. Start-up Funds (\$5,000.00 of a total grant amount of \$10,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Chair: Committee / Task Force

2024: Hawaii International Conference on System Sciences (HICSS).

2023 – 2024: Association for Information Systems AMCIS.

Chair: Conference / Track / Program

2022: Association for Information Systems AMCIS.

2022: Administrative Sciences Association of Canada (ASAC). Co-Chair, Information Systems Division, Administrative Sciences Association of Canada (ASAC)

Invited Lecture

2014: McMaster University, Hamilton, Canada-Ontario. "Project Planning Using Microsoft Project Software", K736 MBA Course (Management Issues in eHealth)

2014: McMaster University, Hamilton, Canada-Ontario. "Integration of Business Processes in SAP ERP", K603 MBA Course (Information Systems in Business) Guest Lecturer, McMaster University

Member: Committee/Task Force

2024: International Business School, Beijing Foreign Studies University. Supervisory committee member for Guoqing Yin, International Business School, Beijing Foreign Studies University, Beijing, China, expected to defend in Summer 2025

.

2024: Wilfrid Laurier University Waterloo, Canada. Supervisory committee member for Pourya Parsaei (MSc, 2024), Wilfrid Laurier University

.

Other Professional Service Activities

2020: Administrative Sciences Association of Canada. Program Coordinator, Information Systems Division

2020: Administrative Sciences Association of Canada (ASAC). Program Coordinator, Information Systems Division, Administrative Sciences Association of Canada (ASAC) (2020)

2014: Volunteer, Pre-ICIS HCI/ MIS Research Workshop. Volunteer in Conference Organization, The Thirteen Annual Pre-ICIS HCI/ MIS Research Workshop, Conference, 2014

Reviewer: Ad Hoc Reviewer for a Journal

2024: Journal of Business Research.

2024: Journal of Retailing and Consumer Services.

2024: Psychology & Marketing.

2017 – 2024: Internet Research.

2019 – 2021: Information & Management.

2020: Multidisciplinary Business Review.

2020: Journal of Organizational Computing and Electronic Commerce.

2018 – 2020: International Journal of Information Management.

2019: IEEE Access.

2018: European Journal of Information Systems.

Reviewer: Conference Paper

2021: European Conference on Information Systems.

2016 – 2021: International Conference on Information Systems (ICIS).

2016 – 2021: Americas' Conference on Information Systems.

2019 – 2020: Administrative Sciences Association of Canada (ASAC).

Scholarly Work in Progress

Papers Under Review

Golmohammadi, A., Taghavi, M., & Farivar, S. (2024). "Improving a Supplier's Social Responsibility: The Effect of Competition and Incomplete Visibility," Initial submission to *Omega - International Journal of Management Science*.

Farivar, S., Golmohammadi, A., & Ramirez, A. (2020). "Data Analytics Capabilities in Supply Chain Management," Initial submission.
Description: Enterprise Information Systems journal

Farivar, S., Golmohammadi, A., & Ramirez, A. (2020). "Analytics Capability and Firm Performance in Supply Chain Organizations," Initial submission to *Decision Support Systems*.

Farivar, S., Wang, F., & Yuan, Y. (2020). "Instagram Influencers' Effectiveness: The Application of Dual Process Theory," Revision under 2nd review to *Information and Management*.

Farivar, S., Abouzahra, M., & Ghasemaghaei, M. (2019). "Wearable Device Adoption Among Older Adults: A Mixed-Method Research," Initial submission to *Information and Management*.

Golmohammadi, A., Taghavi, M., & Farivar, S. (2018). "Strategies for Engaging a Buyer in Supplier Development Efforts," 2nd revise and resubmit to *International Journal of Production Economics*.

Working Papers

Farivar, S., Wang, F., & Turel, O. (2024). "Engaging with Social Media Influencers: When Does It Become a Threat?," targeted for Computers in Human Behavior.

Javdan, M., Farivar, S., & Yuan, Y. (2022). "Perceived Impact of Online Reviews: Managers' Response in Hospitality Industry."

Dabiran, E., Farivar, S., Wang, F., & Grant, G. (2022). "Engaging with virtual influencers: A multi-method study."

Parsaei, P., Golmohammadi, A., & Farivar, S. (2022). "Knowledge Acquisition in NGO-led Green Alliances."

Farivar, S., Wang, F., & Turel, O. (2022). "Problematic Engagement with Social Media: Users' Self Regulation and Supportive Feature."

Dabiran, E., Farivar, S., Wang, F., & Grant, G. (2022). "Engaging with virtual influencers: a netnography study," targeted for European Conference on Information Systems.

Golmohammadi, A., Taghavi, M., & Farivar, S. (2022). "Improving a Supplier's Social Responsibility: The Effect of Competition and Incomplete Visibility," targeted for Transportation Research Part E.

Dabiran, E., Farivar, S., Wang, S., & Grant, G. (2022). "Engaging virtual influencers: A netnography study,," targeted for European Conference on Information Systems.

Eshghi, K. & Farivar, S. (2020). "The Addition of New Payment Method and Shareholder Value: Evidence from Cryptocurrency Adoption," targeted for Decision Support Systems.

Farivar, S. (2020). "Data Analytics Partnership in Organizations," targeted for Journal of Strategic Information Systems.

Alashoor, T., Lambert, L., & Farivar, S. (2018). "A Review of Measures of Disclosure Outcomes in the IS Privacy Literature," targeted for Information and Management.

Farivar, S., Ghasemaghaei, M., & Turel, O. (2018). "Helpfulness of Online Consumer Reviews: Construal Level Perspective," targeted for European Journal of Information Systems.

Farivar, S. & Ghasemaghaei, M. (2018). "Understanding the Use of Data Analytics in Organizations," targeted for Journal of Strategic Information Systems.

Farivar, S. & Yuan, Y. (2018). "Impulse Buying Behavior in Social Commerce Platforms," targeted for Computers in Human Behavior.

Farivar, S., Yuan, Y., & Turel, O. (2018). "The Swaying Effects of Online Consumer Review," targeted for European Journal of Information Systems.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI5481	Seminar in Information Systems II - Current Trends	0.5	3	Main	100%
2024/Winter	BUSI6401	Seminar in Information Systems II	0.5	3	Main	100%
2023/Fall	BUSI1401	Foundations of Info Systems	0.5	88	Main	100%

2023/Fall	BUSI1401	Foundations of Info Systems	0.5	87	Main	100%
2023/Winter	BUSI3402	Systems Analysis & Design	0.5	60	Main	100%
2023/Winter	BUSI1401	Foundations of Info Systems	0.5	100	Main	100%
2023/Winter	BUSI1401	Foundations of Info Systems	0.5	100	Main	100%
2021/Fall	BUSI2400	Foundations of Information Systems	0.5	74	Main	100%
2021/Fall	BUSI2400	Foundations of Information Systems	0.5	78	Main	100%
2021/Fall	BUSI2400	Foundations of Information Systems	0.5	76	Main	100%
2021/Fall	BUSI2400	Foundations of Information Systems	0.5	78	Main	100%
2021/Winter	BUSI3402	Systems Analysis & Design	0.5	59	Main	100%
2020/Fall	BUSI2400	Foundations of Information Systems	0.5	77	Main	100%
2020/Fall	BUSI2400	Foundations of Information Systems	0.5	80	Main	100%
2020/Fall	BUSI2400	Foundations of Information Systems	0.5	77	Main	100%
2020/Winter	BUSI3402	Systems Analysis & Design	0.5	60	Main	100%
2019/Fall	BUSI2400	Foundations of Information Systems	0.5	76	Main	100%
2019/Fall	BUSI2400	Foundations of Information Systems	0.5	80	Main	100%
2019/Winter	BUSI2400	Foundations of Information Systems	0.5	79	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2020-2021: External examiner, Master thesis in School of Information Technology

University Assignments

Masters Thesis Committees:

2022-2023: Yue Li

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

DeGroote School of Business, McMaster University

School Assignments

Other Committees:

2016-2017: DDSA Committee

2015-2016 – 2016-2017: DDSA Committee

University Assignments

Other Committees:

2016-2017 – 2017-2018: GSA Council (FRC)

2015-2016: CUPE, Local 3906

H. OTHER

Student Experience Activities

2015 - McMaster Workshop Series: Knowing Your Rights as a Teaching Assistant

Selected Media Appearances: Online

2022 - The dark side of social media influencing, The Conversation

Selected Media Appearances: Radio

2024 - Impacts of Social Media Influencers, Ottawa at Work, CFRA 580 : Feb 29. 2024

Credentials

Service to the Community

Other Community Service Activities

2015: Organizer "Knowing Your Rights as a TA" Workshop, DeGroote School of Business

2014: The Thirteen Annual Pre-ICIS HCI/MIS Research Workshop, PhD Student Volunteer in Conference Organization

Curriculum Vitae - Sprott School of Business

Naomi Fernando, CPA
Lecturer, Teaching Stream - Term
Sprott School of Business (Accounting)
Telephone:
Email: naomifernando@cunet.carleton.ca
AACSB Qualification: Instructional Practitioner (IP) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Chartered Professional Accountant. Chartered Professional Accountants of Ontario.

Bachelor of Commerce. Sprott School of Business.

B. EMPLOYMENT

Academic Appointments

Instructor I, Sprott School of Business, Carleton University (August, 2023 - Present), Ottawa, Canada-Ontario.

Lecturer, Algonquin College of Applied Arts and Technology (May, 2023 - August, 2023), Ottawa, Canada-Ontario.

Other Employment

Audit Manager, Welch LLP (September, 2020 - March, 2023), Ottawa, Canada-Ontario.

Staff accountant, Ernst and Young LLP (March, 2018 - September, 2020), Ottawa, Canada-Ontario.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Refereed Scholarly Publications

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI3040	Data Analytics and Information Systems in Accounting	0.5	32	Main	100%
2024/Winter	BUSI3007	Auditing II	0.5	52	Main	100%
2024/Winter	BUSI3005	Taxation I	0.5	37	Main	100%
2023/Fall	BUSI3040	Data Analytics and Information Systems in Accounting	0.5	46	Main	100%
2023/Fall	BUSI3007	Auditing II	0.5	50	Main	100%
2023/Fall	BUSI3007	Auditing II	0.5	27	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Curriculum Vitae - Sprott School of Business

Rowland Few, DBA
Associate Professor, Teaching Stream - Tenured, 2022
Sprott School of Business (Entrepreneurship)
Telephone: 513-520-2600 x3303
Email: rowland.few@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Business Administration. Paris School of Business.
Title: *Dissertation title: SME Digital Transformation and the Adoption of Artificial Intelligence for Sales Growth.*
Master of Business Administration. Queens University.
Bachelor of Science. University of Luton.
Diploma. University of Luton.

B. EMPLOYMENT

Academic Appointments

Instructor III, Sprott School of Business, Carleton University (January, 2017 - Present), Ottawa, Canada-Ontario. Instructor III, teaching 6 courses for BUSI2800 Entrepreneurship, BUSI3810 Business Development, BUSI3820 Business Design and BUSI4810 Practicum Business Design. New BUSI3210 Personal Selling was BUSI4901A Special Topics.

Contract Instructor, Accounting, Sprott School of Business, Carleton University (September, 2016 - December, 2016), Ottawa, Canada-Ontario. Contract instructor for Entrepreneurship courses BUSI3810 Business Development and BUSI3820 Business Design.

Other Employment

CEO and founder, TheSalesDeskCompany, Inc (September, 2012 - Present), Ottawa, Canada-Ontario. TheSalesDeskCompany Inc provides on-demand B2B sales teams to enable technology and manufacturing companies to acquire new customers and realize exponential growth in their respective markets. From company infancy to million dollar sales, our representatives provide lead generation and qualification, business development, outbound calling and inbound sales support. Our process is metrics driven to drive sustainable results and tangible ROI. During this time we have supported:

- Carleton University Accelerator as mentor and business advisor for +80 LTW founders and teams. Hired and trained Carleton University Sprott Business School students and placed in top Canadian companies
- Presented 15 sales workshops to Carleton's Hatch, LTW and Carleton's Technology Innovation Management program
- Ottawa and Toronto technology companies build and implement their sales systems while adding horsepower to accelerate demos, proof of concept and sales.
- Recently we have expanded our customer base and added sales teams in Ottawa, Toronto and Guelph to maximize support across Ontario and the US.
- Recently we have expanded our customer base and added sales teams in Ottawa, Toronto and Guelph to maximize support across Ontario and the US.

Project Manager / Product Integrity Manager, Tropic Networks (January, 2001 - August, 2016), N/A, Unknown. Managed R&D project management office reporting weekly activities of technology development to Tropic and strategic partner/Investor Alcatel Executive. Simultaneously managed Product Integrity team delivering first pass global regulatory compliance and global Telecommunications companies requirements.

CEO and Founder,, RFEW Solutions Group Inc. (September, 2008 - August, 2012), Ottawa, Canada-Ontario. Sales consultancy to provide the Ottawa Technology start-up community with a cost effective means to growing sales and sales teams. Projects include:

- Established Carleton Universities Accelerator Lead-To-Win Sales Desk
- Recruited 90 companies and closed 102 STEM Internships in 10 months
- Executive Director local ISP, National Capital Freenet adding \$600K ARR in 2 yrs. - doubling revenue. While implementing systems to turn around a multi-year losses.

Quality Manager, West End Systems (February, 2017 - May, 2008), N/A, Unknown. Established quality and approvals group for Newbridge Networks affiliate - West End Systems. Established quality system in accordance with ISO9001 and reseller (Lucent) specific requirements. Moved to Canada

Director, Ecosystem – Talent First Network, Carleton University (April, 2007 - September, 2008), Ottawa, Canada-Ontario. Evangelized open source software and business models across Ontario. Increased participation from 3 to 63 companies (start-up to global corporation) across Ontario - target of 50.

Pipeline of 120 companies. Established Talent First Network as a keystone organization via cold call, face to face, Website, Career fairs, Open Source Boot Camps and the Open Source Business Resource

Director, Business Development, LoBenn Inc. (August, 2006 - April, 2007), Ottawa, Canada-Ontario. Established and managed sales and distribution channels to Canadian and US alarm monitoring companies, alarm industry dealers and installers. Promoted LoBenn at major Canadian and US security trades shows – Resulting in 200 prospects including 6 of top 10 alarm monitoring - secured field trials with 3.

Product Integrity Manager, Cambrian Systems/Nortel Network (May, 1998 - January, 2001), N/A, Unknown. Established and managed product integrity group for start-up Cambrian Systems. . Acquired by Nortel Networks in December 98. Managed the transition, integration and expanded team. Coordinating with Nortel and Cambrian Human Resources and Management.

Senior Approvals Engineer, Newbridge Networks (September, 1994 - February, 1997), N/A, Unknown. Conducted Electrical/Electronic regulatory approval for Europe, Middle East and Africa Liaised with Regulatory bodies and Test Laboratories to understand new requirements and assessment methods.

Technical Manager, Geomarc Telephones (December, 1993 - September, 1994), N/A, Unknown. Managed design, customer support and repair of telephones and answer machines from Chinese and Hong Kong partners. Secondment to Shen Zhen to improve manufacturing quality.

Engineer, British Standards Institute (May, 1985 - December, 1993), N/A, United Kingdom. Engineer for United Kingdom's national test lab. Assessed and reported on International, National and Municipal regulatory requirements for Electrical/Electronic products to ensure safety of public.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Publications in Conference Proceedings (Refereed)			1	1
Paper Presentations (Refereed)			1	1
Totals			2	2

Refereed Scholarly Publications

Articles in Refereed Conference Proceedings

Full Paper

Webb, A., Few, R., & Samarasinghe, E. (2019). Experiential Learning Theory and Praxis in Canadian Business Schools: A Scoping Review. *Administrative Sciences Association of Canada (ASAC)*.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Webb, A., Few, R., & Samarasinghe, E. (2019). *Experiential Learning Theory and Praxis in Canadian Business Schools: A Scoping Review*. Administrative Sciences Association of Canada (ASAC), St-Catherine, Canada-Ontario.

Contract or Other Research

Other Professional Activities

Consulting Experience

2020: Food Security research- Mapping Ottawa's Food Security ecosystem, Food Security research- Mapping Ottawa's Food Security ecosystem

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2023/Winter	BUSI3210	Personal Selling	0.5	60	Main	100%
2023/Winter	BUSI2800	Entrepreneurship	0.5	299	Main	100%
2023/Winter	BUSI4810	Practicum in Business Creation	0.5	17	Main	100%
2022/Fall	BUSI2800	Entrepreneurship	0.5	294	Main	100%
2022/Winter	BUSI4901	Selected Topics in Management I	0.5	14	Main	100%
2022/Winter	BUSI4810	Practicum in Business Creation	0.5	17	Main	100%

2022/Winter	BUSI2800	Entrepreneurship	0.5	80	Main	100%
2022/Winter	BUSI2800	Entrepreneurship	0.5	78	Main	100%
2021/Fall	BUSI3820	Practicum in Business Design	0.5	14	Main	100%
2021/Fall	BUSI2800	Entrepreneurship	0.5	79	Main	100%
2021/Fall	BUSI2800	Entrepreneurship	0.5	77	Main	100%
2021/Fall	BUSI3810	Business Development	0.5	13	Main	100%
2021/Fall	BUSI2800	Entrepreneurship	0.5	75	Main	100%
2021/Winter	BUSI4810	Practicum in Business Creation	0.5	22	Main	100%
2021/Winter	BUSI2800	Entrepreneurship	0.5	79	Main	100%
2021/Winter	BUSI2800	Entrepreneurship	0.5	80	Main	100%
2020/Fall	BUSI2800	Entrepreneurship	0.5	77	Main	100%
2020/Fall	BUSI2800	Entrepreneurship	0.5	80	Main	100%
2020/Fall	BUSI3820	Practicum in Business Design	0.5	28	Main	100%
2020/Fall	BUSI3810	Business Development	0.5	35	Main	100%
2019/Fall	BUSI3810	Business Development	0.5	26	Main	100%
2019/Fall	BUSI3820	Practicum in Business Design	0.5	21	Main	100%
2019/Winter	BUSI2800	Entrepreneurship	0.5	89	Main	100%
2019/Winter	BUSI2800	Entrepreneurship	0.5	73	Main	100%
2018/Fall	BUSI2800	Entrepreneurship	0.5	80	Main	100%
2018/Fall	BUSI3820	Practicum in Business Design	0.5	19	Main	100%
2018/Fall	BUSI3810	Business Development	0.5	27	Main	100%
2018/Fall	BUSI2800	Entrepreneurship	0.5	82	Main	100%
2018/Winter	BUSI2800	Entrepreneurship	0.5	45	Main	100%
2018/Winter	BUSI2800	Entrepreneurship	0.5	89	Main	100%
2017/Fall	BUSI2800	Entrepreneurship	0.5	77	Main	100%
2017/Fall	BUSI2800	Entrepreneurship	0.5	87	Main	100%
2017/Fall	BUSI3820	Practicum in Business Design	0.5	16	Main	100%
2017/Fall	BUSI3810	Business Development	0.5	22	Main	100%
2017/Winter	BUSI2800	Entrepreneurship	0.5	81	Main	100%
2017/Winter	BUSI2800	Entrepreneurship	0.5	86	Main	100%
2016/Fall	BUSI3810	Business Development	0.5	28	Main	100%
2016/Fall	BUSI3820	Practicum in Business Design	0.5	27	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

Credentials

Curriculum Vitae - Sprott School of Business

Maryam Firoozi, PhD
Assistant Professor - Tenured,
Sprott School of Business (Accounting)
Telephone: 613-520-2600 x1759
Email: maryam.firoozi@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-8192-4277>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Concordia University.

Master of Accounting. Tarbiat Modares University.
Title: *Graduation with High Distinction from the Department of Accounting of Tarbiat Modares University*

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (July, 2022 - Present), Ottawa, Canada-Ontario.
Assistant Professor, Sprott School of Business, Carleton University (July, 2017 - June, 2022), Ottawa, Canada-Ontario.
Assistant Professor (LTA), Concordia University (2016 - 2017), Montreal, Canada-Quebec.
Assistant Professor (LTA), Lawrence Technological University (2015 - 2016), Southfield, Michigan.
Instructor / Teaching Assistant / Research Assistant, Concordia University (2010 - 2014), Montreal, Canada-Quebec.

Other Employment

Financial Analyst, Export Development Bank of Iran, Department of Managerial Accounting and Budgeting (2008 - 2010), Tehran, Iran.
Accountant, Parsian Leasing Co., Department of Financial Accounting (2006 - 2007), Tehran, Iran.

C. PROFESSIONAL HONOURS

2024: Best Paper Award, ASAC Conference Montreal, Canada. Best Paper Award, ASAC Conference, Montreal, Canada (presented by co-authors)
.
2022 – 2024: Research Publication Award, Sprott School of Business. \$1000
2020: Research Publication Award, Sprott School of Business. \$3000.
2010 – 2013: TD Bank Fellowship, Concordia University.
2007: Bell Research Center for Business Process Innovations Award, Concordia University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	5		6
Articles-in-Progress (All)	1	9		10
Publications in Conference Proceedings (Refereed)		3		3
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings			1	1
Paper Presentations (Refereed)		5		5
Grants - Funded (both refereed and non-refereed)		9		9

Totals	2	31	1	34

Refereed Scholarly Publications

Articles in Refereed Journals

- Firoozi, M., & Mohsni, S. (2023). Cybersecurity disclosure in the banking industry: a comparative study. *International Journal of Disclosure and Governance*, 20, 451-477. [B,Other]
- Firoozi, M., & Magnan, M. (2022). Audit Committee Members' Proximity to Corporate Headquarters and Audit Fees. *Managerial Auditing Journal*, 37 (8), 1062-1090. [A]
- Firoozi, M., & Keddle, L. (2022). Geographical Diversity Among Directors and Corporate Social Responsibility. *British Journal of Management*, 33 (2), 828-863. [A]
- Published with DOI. Early View, Online Version of Record before inclusion in an issue
Volume assigned in 2022. Changed accordingly
- Firoozi, M., & Ku, C. H. (2022). Corporate Accountability During Crisis in the Digitized Era. *Accounting Auditing and Accountability Journal*. [A+]
- Vol. ahead-of-print No. ahead-of-print. DOI only
- Ku, C., & Firoozi, M. (2019). The Use of Crowdsourcing and Social Media in Accounting Research. *Journal of Information Systems*, 33 (1), 85-111. [A]
- Updated: Jan 16, 2020
Early online on November 30, 2017
- Firoozi, M., Magnan, M., & Fortin, S. (2019). Does Proximity to Corporate Headquarters Enhance Directors' Monitoring Effectiveness? A Look at Financial Reporting Quality. *Corporate Governance: An International Review*, 27 (2), 98-119. [A]
- Updated: Jan 16, 2020
Forthcoming. Early online on November 13, 2018. This paper is temporary free access

Articles in Refereed Conference Proceedings

Full Paper

- Firoozi, M., & Mohsni, S. (2022). Cybersecurity Disclosure in the Banking Industry: A Comparative Study. *European Accounting Association*.
- Firoozi, M., & Mohsni, S. (2022). Cybersecurity Disclosure in the Banking Industry: A Comparative Study. *Canadian Academic Accounting Association Annual Conference*.
- Firoozi, M., & Mohsni, S. (2022). Cybersecurity Disclosure in the Banking Industry: A Comparative Study. *American Accounting Association Annual Conference*.
- Firoozi, M., Magnan, M., & Fortin, S. (2015). Board of Directors' Geographical Diversity and Earnings Quality. *Conférence Internationale de Gouvernance*.
- Quebec City
- Firoozi, M., Fortin, S., Magnan, M., & Nicholls, S. (2015). Do Foreign Directors on Audit Committees Enhance Financial Reporting Quality? *Canadian Academic Accounting Association Annual Conference*.
- Toronto, Ontario

Chapters in Edited Books

- Firoozi, M., & Keddle, L. (2021). Teaching and Learning Guide: Geographical Diversity Among Directors and Corporate Social Responsibility. *British Journal of Management*. Wiley and Sons. [Status: Published]

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

- Firoozi, M. & Mohsni, S. (2024). *Evolution of Cybersecurity Disclosure*. American Accounting Association Annual Conference, Washington, District of Columbia.
- Firoozi, M. & Mohsni, S. (2022). *Cybersecurity Disclosure in the Banking Industry: A Comparative Study*. European Accounting Association, Bergen, Norway.
- Firoozi, M. & Mohsni, S. (2022). *Cybersecurity Disclosure in the Banking Industry: A Comparative Study*. Canadian Academic Accounting Association Annual Conference, Virtual, Virtual.
- Firoozi, M. & Mohsni, S. (2022). *Cybersecurity Disclosure in the Banking Industry: A Comparative Study*. American Accounting Association Annual Conference, Virtual, Virtual.
- Firoozi, M. & Magnan, M. (2019). *Audit Committee Members' Proximity to Corporate Headquarters and Audit Fees*. Conférence Internationale de Gouvernanc, Brussels, Belgium.

- Firoozi, M. & Ku, C. H. (2019). *Accountability on Social Media: CEO Narratives and Stakeholders' Response at the Time of a Crisis*. Qualitative Accounting Research Symposium, Guelph, Canada-Ontario.
- Firoozi, M. & Keddle, L. (2018). *Local Directors and Corporate Social Responsibility: Is There a Local Bias?* Center for Social and Environmental Accounting Research (CSEAR) North American Congress, Toronto, Canada-Ontario.
- Firoozi, M. & Magnan, M. (2017). *Audit Committee Members' Proximity to Corporate Headquarters and Audit Fees*. Canadian Academic Accounting Association Annual Conference, Montreal, Canada-Quebec.
- Firoozi, M. & Magnan, M. (2017). *Audit Committee Members' Proximity to Corporate Headquarters and Audit Fees*. European Accounting Association Annual Congress, Valencia, Spain.
- Firoozi, M., Magnan, M., & Fortin, S. (2015). *Board of Directors' Geographical Diversity and Earnings Quality*. Conférence Internationale de Gouvernance, Quebec City, Canada-Quebec.
- Firoozi, M., Fortin, S., Magnan, M., & Nicholls, S. (2015). *Do Foreign Directors on Audit Committees Enhance Financial Reporting Quality?* Canadian Academic Accounting Association Annual Conference, Toronto, Canada-Ontario.

Other Presentations

Presentation

- 2024: STS/HST Working Group. Towards Accountability for Artificial Intelligence, STS/ HST Working Group. University of California Berkeley, United States
- 2022: Professional Accounting Research Group. Firoozi, M., & Mohsni, S. (2022). Cybersecurity Disclosure in the Banking Industry: A Comparative Study. Professional Accounting Research Group (PARG) Seminar. Sprott School of Business, Carleton University, Virtual
- 2017: Brown Bag Series, Concordia University, Montreal, Canada-Quebec. Audit Committee Members' Proximity to Corporate Headquarters and Audit Fees

Contract or Other Research

Research Grants and Awards

Grants

- 2023 [Year 3 of 3]: Firoozi, M. & Mohsni, S., Insight Development Grant (\$13,237.00 of a total grant amount of \$39,710.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]
- 2023 [Year 2 of 2]: Firoozi, M. Insight Development Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]
- 2022 [Year 2 of 3]: Firoozi, M. & Mohsni, S., Insight Development Grant (\$13,237.00 of a total grant amount of \$39,710.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]
- 2022 [Year 1 of 2]: Firoozi, M. Insight Development Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]
- 2021 [Year 2 of 2]: Firoozi, M. Insight Development Grant (\$34,218.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]
- 2021 [Year 1 of 3]: Firoozi, M. & Mohsni, S., Insight Development Grant (\$13,237.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]
- 2021 [Year 2 of 2]: Firoozi, M. Insight Development Grant, Principal Investigator, CPA Canada. [Status: Funded]
- 2020 [Year 1 of 2]: Firoozi, M. Insight Development Grant (\$34,218.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]
- 2020: Firoozi, M. & Mohsni, S., Grant (\$6,000.00), Principal Investigator, Canadian Academic Accounting Association. [Status: Funded]
- 2020 [Year 1 of 2]: Firoozi, M. Insight Development Grant, Principal Investigator, CPA Canada. [Status: Funded]
- 2020: Schweitzer, L., Angela, D., Firoozi, M., & Nardon, L., Multidisciplinary Research Catalyst Fund, Collaborator, Carleton University, Vice-President (Research and International). [Status: Funded]
- 2017: Firoozi, M. Start-up Funds (\$10,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]
- 2017: Firoozi, M. Start-up Funds (\$10,000.00), Principal Investigator, Carleton University, Dean's Office - Arts & Social. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Moderator / Facilitator

- 2019: Canadian Accounting Association Annual Meeting, Ottawa, Canada-Ontario.

Chair: Conference / Track / Program

- 2022: European Accounting Association, Bergen, Norway.

Member: Committee/Task Force

2024: American Accounting Association. Member, American Accounting Association

2024: Canadian Academic Accounting Association (CAAA). Member, Canadian Academic Accounting Association

2020: Chartered Professional Accountants Association of Canada. Member of the CPA Canada-CAAA Grant Review Committee

2016: College of Management, Lawrence Technological University, Southfield, Michigan. Member of Assessment Committee

2016: College of Management, Lawrence Technological University, Southfield, Michigan. Member of Faculty Development Committee

2015 – 2016: College of Management, Lawrence Technological University, Southfield, Michigan. Coordinator of the Brown Bag Series

2013: Canadian Academic Accounting Association Annual Conference, Montreal, Canada-Quebec. Member of the Organizing Committee

Other Professional Service Activities

2024: STS/HST Working Group.

Co-lead, STS/HST Working Group, University of California, Berkeley, United State

2022: Social Sciences and Humanities Research Council (SSHRC). External reviewer, SSHRC Insight Grant

Reviewer: Ad Hoc Reviewer for a Journal

2024: Accounting, Auditing & Accountability Journal. Accounting, Auditing, & Accountability Journal, Accounting Perspectives

2022: Managerial Finance.

2022: Corporate Governance: An International Review.

2021 – 2022: British Journal of Management.

2020 – 2022: Accounting Perspectives.

2020: Asia-Pacific Journal of Accounting and Economics.

2019 – 2020: Corporate Governance: An International Review.

Reviewer: Conference Paper

2022: American Accounting Association Annual Conference.

2022: Canadian Academic Accounting Association Annual Conference.

2021: Joint Midyear Meeting of the Accounting Information Systems (AIS) and Strategic and Emerging Technologies (SET) Sections.

2021: American Accounting Association.

2014 – 2017: Canadian Academic Accounting Association Annual Conference.

2013 – 2017: American Accounting Association (AAA) Annual Meeting.

Scholarly Work in Progress

Papers Under Review

Firoozi, M. & Keddle, L. (2020). "Geographical Diversity Among Directors and Corporate Social Responsibility," 4+ revise and resubmit.

Description: British Journal of Management

Firoozi, M. & Magnan, M. (2020). "Audit Committee Members' Proximity to Corporate Headquarters and Audit Fees," 2nd revise and resubmit.

Description: Managerial Auditing Journal

Firoozi, M. & Ku, C. H. (2019). "Accountability on Social Media: CEO Narratives and Stakeholders' Response at the Time of a Crisis," 2nd revise and resubmit.

Description: AAAJ

Working Papers

Firoozi, M. (2022). "Investors, Cybersecurity and Data Rights."

Firoozi, M. (2022). "Accountants' Role in Cybersecurity."

Firoozi, M. (2022). "Towards Accountability for Artificial Intelligence."

Firoozi, M., Magnan, M., Fortin, S., & Nicholls, S. (2022). "Location of Directors and Financing."

Mohsni, S., Otchere, I., & Firoozi, M. (2022). "Board Gender Diversity Policy and Firm Governance, Performance and Risk-Taking: the Case of Canada."

Firoozi, M. & Mohsni, S. (2022). "Evolution of Cybersecurity Disclosure."

Firoozi, M. & Mohsni, S. (2022). "Cybersecurity Disclosure in the Banking Industry: A Comparative Study."

Firoozi, M., Magnan, M., Fortin, S., & Nicholls, S. (2017). "Foreign Directors and Firm Valuation."

Firoozi, M. & Keddle, L. (2017). "Local Directors and Corporate Social Responsibility: Is There a Local Bias?."

Firoozi, M., Magnan, M., & Fortin, S. (2017). "Does Proximity to Corporate Headquarters Enhance Directors' Monitoring Effectiveness? A Look at Financial Reporting Quality."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2023/Winter	ACCT5014	Financial Corporate Governance & Accountability	0.25	8	Main	100%
2022/Fall	BUSI2002	Intermediate Accounting II	0.5	60	Main	100%
2022/Fall	BUSI1004	Financial Accounting for Business Students	0.5	73	Main	100%
2022/Fall	ACCT5001	Financial Accounting	0.25	16	Main	100%
2022/Fall	ACCT5001	Financial Accounting	0.25	18	Main	100%
2022/Fall	ACCT5001	Financial Accounting	0.25	17	Main	100%
2022/Winter	BUSI2001	Intermediate Accounting I	0.5	49	Main	100%
2022/Winter	BUSI1004	Financial Accounting for Business Students	0.5	49	Main	100%
2022/Winter	BUSI2001	Intermediate Accounting I	0.5	0	Main	100%
2022/Winter	BUSI2001	Intermediate Accounting I	0.5	31	Main	100%
2021/Fall	BUSI1004	Financial Accounting for Business Students	0.5	84	Main	100%
2021/Winter	BUSI6001	Seminar in Accounting II	0.08	3	Main	17%
2021/Winter	BUSI1004	Financial Accounting for Business Students	0.5	34	Main	100%
2021/Winter	BUSI1004	Financial Accounting for Business Students	0.5	87	Main	100%
2020/Fall	BUSI1005	Managerial Accounting for Business Students	0.5	16	Main	100%
2020/Fall	BUSI1005	Managerial Accounting for Business Students	0.5	62	Main	100%
2020/Winter	BUSI6000	Seminar in Accounting I	0.06	1	Main	13%
2020/Winter	BUSI1004	Financial Accounting for Business Students	0.5	85	Main	100%
2020/Winter	BUSI1004	Financial Accounting for Business Students	0.5	57	Main	100%
2020/Winter	BUSI5080	Seminar in Accounting I	0.01	0	Main	3.4%
2020/Winter	BUSI2002	Intermediate Accounting II	0.5	45	Main	100%
2019/Fall	BUSI1004	Financial Accounting for Business Students	0.5	39	Main	100%
2019/Winter	BUSI6001	Seminar in Accounting II	0.13	1	Main	25%
2019/Winter	BUSI2002	Intermediate Accounting II	0.5	30	Main	100%
2019/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	69	Main	100%
2019/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	70	Main	100%
2018/Fall	BUSI1004	Financial Accounting for Business Students	0.5	76	Main	100%
2018/Winter	BUSI1005	Managerial Accounting for Business Students	0.43	81	Main	86%
2018/Winter	BUSI1005	Managerial Accounting for Business Students	0.13	25	Main	26%
2018/Winter	BUSI1005	Managerial Accounting for Business Students	0.09	17	Main	18%
2018/Winter	BUSI1005	Managerial Accounting for Business Students	0.07	13	Main	14%
2018/Winter	BUSI1005	Managerial Accounting for Business Students	0.37	70	Main	74%

2018/Winter	BUSI1005	Managerial Accounting for Business Students	0.41	78	Main	82%
2017/Fall	BUSI6000	Seminar in Accounting I	0.09	1	Main	

Service to the institution (Academic)

Faculty Assignments

PhD. Comprehensive Committees:

2024-2025: Zia Rahman

2024-2025: Zhuoyuan Jian

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Sprott School of Business, Carleton University

School Assignments

Other Committees:

2020-2021: Accounting Working Group to Develop a Course in Data Analytics for accounting students

Faculty Assignments

Chair:

2024-2025: Chair, PhD. Proposal Defense Committee, Arushi Sharma

H. OTHER

Selected Media Appearances: Online

2020 - "Effects of Distance: Proximity Matters - Now More than Ever" Sprott Business Insights: Managing During COVID-19

2020 - "Managers' Accountability on Social Media" Professional Accounting Research Group Video Papers

Credentials

Professional Memberships

American Accounting Association, N/A

Canadian Academic Accounting Association, N/A

Center for Social and Environmental Accounting Research, N/A

Professional Development

Professional Seminars / Workshops

2024: Canadian Academic Accounting Association (CAAA). Has Research Lost Its Way?

2024: Canadian Academic Accounting Association. Crafting Qualitative Accounting Research Papers

2024: American Accounting Association. EY Academic Resource Center - The EYARC Experience Platform

2024: American Accounting Association. The ESG Mandate: What you Need to Know about Domestic and International Regulations

2024: American Accounting Association. Tools, Rules, and Risk: Responsible Generative AI Use in Accounting Research - Virtual webinar series

2023: American Accounting Association. Webinar Series - Python in the Accounting Curriculum and the Accounting profession

2023: American Accounting Association. Translating your research impact for the business model - American Accounting Association Webinar Series

2023: Shaping AI for Just Futures,.

2022: Compute Canada Federation Humanities and Social Sciences Series.

2022: CascadAI: PanCanadian Hybrid Conference.

2022: Incorporating Cybersecurity into the Entire Curriculum. Incorporating Cybersecurity into the Entire Curriculum, American Accounting Association Webinar Series, Virtual

Skills

Languages

Persian: Native English: Full Professional Proficiency French: Elementary Proficiency

Curriculum Vitae - Sprott School of Business

Devin Fraser, MAcc
Assistant Professor, Teaching Stream - Preliminary - Tenure Track
Sprott School of Business (Accounting)
Telephone:
Email: devin.fraser@carleton.ca
AACSB Qualification: Instructional Practitioner (IP) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Master of Accounting. Carleton University.

Bachelor of Commerce. Sprott School of Business, Carleton University.

Title: *High Distinction*

Professional Certifications

Chartered Professional Accountant (CPA), 2019

Certified Fraud Examiner, 2018

B. EMPLOYMENT

Academic Appointments

Instructor II, Sprott School of Business, Carleton University (May, 2022 - Present), Ottawa, Canada-Ontario. ACCT 5124, 5129, and BUSI 1004, 2005, 3001

Instructor II, Accounting, Sprott School of Business, Carleton University (2022 - Present), Ottawa, Canada-Ontario.

- ACCT 5124 - Data Analytics for Professional Accountants
- ACCT 5129 - Professional Accounting Cases I
- BUSI 1004 - Introduction to Financial Accounting
- BUSI 3001 - Business Combinations

Author (Contract), Chartered Professional Accountants of Canada (CPA Canada) (2020 - Present), Ottawa, Canada-Ontario. Author cases at the Core 1 level (which focuses on financial reporting and assurance) to be used in the CPA Professional Education Program (PEP).

Marker (Contract), Chartered Professional Accountants of Canada (CPA Canada) (2019 - Present), Ottawa, Canada-Ontario.

- Grade the Common Final Examination (Day 2 and Day 3).
- Grade the Core 1 and Assurance PEP modules.

Contract Instructor, Sprott School of Business, Carleton University (August, 2019 - April, 2022), Ottawa, Canada-Ontario.

- ACCT 5124 – Data Analytics for Professional Accountants
- ACCT 5129 – Professional Accounting Cases I
- BUSI 1004 – Introduction to Financial Accounting
- BUSI 2005 – Income Tax Fundamentals
- BUSI 3001 – Accounting for Business Combinations

Contract Instructor, Sprott School of Business, Carleton University (2019 - 2020), Ottawa, Canada-Ontario. ACCT 5124, 5129, and BUSI 1004, 2005, 3001

Other Employment

Senior Associate, Forensic Services, PricewaterhouseCoopers (PwC) (September, 2018 - Present), Ottawa, Canada-Ontario.

- Performing in-depth research about an individual and/or the allegations surrounding the individual for summary to the Project Manager;
- Performing electronic document review of emails and files obtained from company servers and/or an individuals phone/computer;
- Preparing for and participating in interviews of individuals with respect to the investigation;
- Performing data extraction, transformation, and loading for investigative data analysis within Alteryx and Power BI;
- Summarizing relevant information with respect to forensic engagements;

Corresponding with clients and legal counsel regarding the status of investigations; and,

Assisting the Project Manager with the preparation of clear and concise investigative reports including the scope, approach, relevant facts, findings, and recommendations on the results of the investigation.

Manager, Financial Planning & Analysis / Senior Financial Analyst,, Smart & Biggar (2019 - 2022), Ottawa, Canada-Ontario. Work under the Chief Financial

Officer on revenue forecasting, data analytics / financial analysis, and other special projects.

- Use data analytics to combine financial and other data trends with information from practice group leads to create revenue forecasts and assess past results.
- Act as a Business Partner by using data analytics to produce ad-hoc financial reports and analysis as requested for stakeholders from across the firm to drive business decisions
- Assist with the preparation of the semi-annual internal partner management discussion and analysis (MD&A).

Work under the Director of Finance on accounting, expense budgeting, and financial reporting, including the preparation of monthly financial results and the annual audited financial statements.

- Perform month-end accounting entries and reviewing account reconciliations performed by senior financial analysts.
- Automate and streamline various processes such as the monthly intercompany billing process, financial reporting package, and the year-end multi-entity consolidation and allocation using data analytic tools such as Power Query and Excel VBA.

Senior Associate, Assurance, PricewaterhouseCoopers (PwC) (January, 2015 - August, 2018), Ottawa, Canada-Ontario.

- Completing external audits of financial statements (IFRS and ASPE) and related services from planning and evidence gathering to completion;
- Conducting investigations/research in order to obtain an in-depth understanding of a client's industry and business;
- Preparing and conducting interviews with the client to complete sections of assigned audit work, including identifying fraud risks;
- Managing junior team members through on the job coaching and sharing best practices on the completion of their sections;
- Demonstrating strong technical knowledge and presenting alternatives and conclusions to the client/Manager;
- Secondment - Campus Talent Acquisition Coordinator; and, o Includes liaising with universities and student groups, delivering on-campus presentations to students, coordinating and attending local recruiting activities, assisting with the development and tracking of the recruitment budget, screening candidates in accordance with PwC selection criteria, and developing and maintaining strong relationships with students.

Secondment – National Learning and Development Team

Instructing associates and experienced associates in the areas of Designing Substantive Audit Procedures, Understanding and Evaluating Controls, Developing an Audit Plan and more.

Teaching Assistant, Sprott School of Business (September, 2013 - August, 2018), Ottawa, Canada-Ontario. Supported a number of courses through instruction and grading including: Introduction to Financial Accounting, Introduction to Managerial Accounting, Intermediate Accounting I, Intermediate Accounting II, Advanced Managerial Accounting, Introduction to Information Systems, and Introduction to Marketing.

Accountant, QNX Software Systems (May, 2014 - August, 2014), Ottawa, Canada-Ontario.

- Assisted with the monthly close process, including the preparation of consolidated financial statements;
- Developed a system to aid with revenue recognition by increasing accuracy and saving 5 hours during each month end close with excel automation; and,
- Designed a template for revenue forecasting that added functionality and transformed the way upper management is able to view information pulled from the data warehouse.

Accountant, City of Ottawa (May, 2013 - April, 2014), Ottawa, Canada-Ontario.

- Worked with SAP daily to perform tasks such as: invoicing, customer master creation, and monitoring customer account activity to ensure timely and efficient payment records; and,
- Performed detailed skip tracing of customers to increase the City's collection rate and keep bad debt expense at a minimum.

Residence Fellow, Carleton University (2013 - 2014), Ottawa, Canada-Ontario.

- Primary point of contact and means of support for a large group of students (50+) for various personal and academic issues.
- Received training in: First Aid CPR, Non-Violent Crisis Intervention, Sexual Assault, Conflict Mediation and Suicide Intervention.

C. PROFESSIONAL HONOURS

2018: CPA Canada Common Final Examination National Honour Roll, Chartered Professional Accountants of Canada. The CFE honour roll consists of the top 1% of successful CFE writers..

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Research Report, Non-Refereed		1		1

Totals		1		1

Refereed Scholarly Publications

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Member: Committee/Task Force

2023: Chartered Professional Accountants of Ontario, Toronto, Canada-Ontario. Attended Certification 2.0 meetings in Toronto to provide feedback to CPA Ontario on the draft Cert 2.0 plan

2019 – 2023: Chartered Professional Accountants of Canada (CPA Canada). Marker, Professional Education Program

Other Professional Service Activities

2023: The Chartered Institute of Public Finance and Accountancy (CIPFA). Instructor - Winter 2023 (Cohort #1)

2013: Chartered Professional Accountants of Ontario, Ottawa, Canada-Ontario. The Board of Ambassadors are the 'Student Council' for the Post-Secondary Ambassador Program. They act as an advisory and advocacy group for the CPA profession. BoA's attend meetings at CPA Ontario, promote and recruit students for CPA Ontario competitions and events, and promote the CPA designation through on campus initiatives.

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI1004	Financial Accounting for Business Students	0.5	71	Main	100%
2024/Winter	ACCT5129	Professional Accounting Cases I	0.25	14	Main	100%
2024/Winter	BUSI1004	Financial Accounting for Business Students	0.5	68	Main	100%
2023/Fall	BUSI3001	Accounting for Business Combinations	0.5	36	Main	100%
2023/Fall	ACCT5124	Data Analytics for Professional Accountants	0.13	11	Main	50%
2023/Fall	ACCT5124	Data Analytics for Professional Accountants	0.13	18	Main	50%
2023/Summer	BUSI3001	Accounting for Business Combinations	0.5	23	Main	100%
2023/Summer	ACCT5129	Professional Accounting Cases I	0.13	8	Main	50%
2023/Summer	ACCT5129	Professional Accounting Cases I	0.13	13	Main	50%
2023/Winter	BUSI3001	Accounting for Business Combinations	0.5	47	Main	100%
2023/Winter	BUSI1004	Financial Accounting for Business Students	0.5	90	Main	100%
2023/Winter	BUSI1004	Financial Accounting for Business Students	0.5	59	Main	100%
2023/Winter	ACCT5129	Professional Accounting Cases I	0.25	13	Main	100%
2022/Fall	BUSI1004	Financial Accounting for Business Students	0.5	72	Main	100%
2022/Fall	ACCT5124	Data Analytics for Professional Accountants	0.25	23	Main	100%
2022/Fall	ACCT5124	Data Analytics for Professional Accountants	0.25	43	Main	100%
2022/Fall	BUSI3001	Accounting for Business Combinations	0.5	54	Main	100%
2022/Summer	BUSI3001	Accounting for Business Combinations	0.5	30	Main	100%
2022/Winter	BUSI3001	Accounting for Business Combinations	0.25	46	Main	50%
2022/Winter	BUSI1004	Financial Accounting for Business Students	0.5	89	Main	100%
2022/Winter	ACCT5129	Professional Accounting Cases I	0.25	13	Main	100%

2021/Fall	BUSI3001	Accounting for Business Combinations	0.5	38	Main	100%
2021/Fall	ACCT5124	Data Analytics for Professional Accountants	0.25	19	Main	100%
2021/Summer	ACCT5124	Data Analytics for Professional Accountants	0.25	24	Main	100%
2021/Summer	ACCT5124	Data Analytics for Professional Accountants	0.25	29	Main	100%
2021/Winter	BUSI1004	Financial Accounting for Business Students	0.5	46	Main	100%
2020/Fall	BUSI1004	Financial Accounting for Business Students	0.5	34	Main	100%
2020/Fall	ACCT5124	Data Analytics for Professional Accountants	0.25	14	Main	100%
2020/Summer	ACCT5124	Data Analytics for Professional Accountants	0.25	29	Main	100%
2020/Summer	ACCT5124	Data Analytics for Professional Accountants	0.25	28	Main	100%
2019/Fall	ACCT5124	Data Analytics for Professional Accountants	0.25	17	Main	100%
2019/Summer	ACCT5124	Data Analytics for Professional Accountants	0.25	30	Main	100%
2019/Summer	ACCT5124	Data Analytics for Professional Accountants	0.25	29	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Sprott School of Business, Carleton University

School Assignments

Course/Program Coordination:

2023-2024: Data Analytics and Information Systems for Accounting, Course Coordinator

2022-2023: ACCT 5129 - Professional Accounting Cases I, Course Coordinator

H. OTHER

Student Experience Activities

2018 - Vice President External, Sprott Master of Accounting Society : The Sprott MAcc Society enhances the experience of Master of Accounting students at the Sprott School of Business. The MAcc Society facilitates social and other non-academic events and builds connections between current Master of Accounting students.

2013 - Vice President Events, Sprott Accounting Students' Association : Several networking events, workshops, and information sessions are held by SASA each year. These events are designed to inform students about accounting career paths, offer students exposure to potential employers, and prepare students for the recruitment season and post-graduation employment. The Vice President of Events is responsible for ensuring the success of all SASA events.

Student Recruitment/Outreach Activities

2022 - Ontario University Fair

2022 - Sprott Accounting Students' Association, Wine & Cheese

2022 - Telfer Accounting Club, Wine & Cheese

2022 - Rotterdam-Carleton International Case Competition : Team coach

2023 - Guest Lecture, Accounting at Notre Dame High School

2023 - Virtual Open House Sprott Mini-Lecture

Other Activities

2023 - The NIBS Worldwide Case Competition : Team Coach

Student Experience Activities

2023 - Master of Accounting Orientation : Session leader

Credentials

Professional Memberships

Carleton University Academic Staff Association (CUASA), 2022

Professional Development

Other Professional Development

2023: Carleton University. Resources and Referrals, Student Support Certificate
2023: Carleton University. Responding to Disclosures of Sexual Violence, Student Support Certificate
2023: Carleton University. Using Virtual Reality in the Classroom, Student Support Certificate
2023: Carleton University. Effective Communication and De-Escalation Skills, Student Support Certificate
2023: Carleton University. Cross Cultural Competence Training ,Student Support Certificate
2023: Carleton University. Trans and Gender Diverse Inclusion,Student Support Certificate
2023: Association of Certified Fraud Examiners. Analyzing Bank Records - Workbook
2023: Association of Certified Fraud Examiners. Conversation with an Insider Trader - Webinar (2 Hours)

Professional Seminars / Workshops

2023: Carleton University. Indigenous Cultural Awareness Workshop, Student Support Certificate
2022: Pearson Accounting Leadership Forum. Teaching Advanced Financial Accounting
2022: Pearson Accounting Leadership Forum. Dive into ETL Using Excel, Google Sheets, Power BI, and Alteryx for Intro Accounting
2022: LivingWorks Start. Suicide Prevention Training
2022: CCDI Consulting. Webinar: the Intersections of Identity: A discussion about the intersections of race, ethnicity, sexuality and gender
2019: Advanced Data Analytics, PricewaterhouseCoopers (PwC).

- In Depth training in Data Foundations (data lifecycle, data types, data management, and relational databases); and,
- In Depth training in Alteryx and Power BI (including Power Query and Power Pivot).

Research Reports

2023: Gray, E., & Fraser, D., What We Heard: Discussion with Employers of Sprott Accounting Students., submitted to PARG Accounting Research Discussion Session.

Curriculum Vitae - Sprott School of Business

Gerald Grant, PhD
Full Professor - Tenured, 2002
Sprott School of Business (Information Technology/Information Systems)
Telephone: 613-520-2600 x8006
Email: gerald.grant@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-9680-741X>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of London.

Title: *London School of Economics and Political Science Thesis: The strategic dimensions of information systems capability: case studies in a developing country context.*

Master of Business Administration. Andrews University.

Bachelor of Science. Andrews University.

B. EMPLOYMENT

Academic Appointments

Co-Director, Black Entrepreneurship Knowledge Hub (BEKH), Carleton University (January, 2021 - Present), Ottawa, Canada-Ontario.

Professor, Sprott School of Business, Carleton University (July, 2019 - Present), Ottawa, Canada-Ontario.

Professor in Residence, Faculty of Social Sciences, University of the West Indies (January, 2020 - January, 2020), Mona, Jamaica.

Charles J. Hedlund Visiting Professor for Business and Computer Science, School of Business, American University of Cairo (May, 2019 - May, 2019), Cairo, Egypt.

Associate Professor, Sprott School of Business, Carleton University (July, 2004 - June, 2019), Ottawa, Canada-Ontario.

Director, Ph.D. Program, Sprott School of Business, Carleton University (July, 2013 - June, 2016), Ottawa, Canada-Ontario.

Visiting Associate Professor, ESSEC Business School (April, 2012 - June, 2012), Cedex, France.

Assistant Professor, Sprott School of Business, Carleton University (July, 1998 - June, 2004), Ottawa, Canada-Ontario. Tenured 2003

Assistant Professor, Faculty of Management, McGill University (August, 1997 - June, 1998), Montreal, Canada-Quebec. 2 year visiting appointment

Lecturer, Department of Information Systems and Computing, Brunel University (January, 1997 - July, 1997), Uxbridge, United Kingdom.

Visiting Lecturer, London Institute (January, 1994 - June, 1994), London, United Kingdom. Taught Business Finance at National Diploma (ND) and Higher National Diploma (HND) levels

Assistant Professor, Solusi University (January, 1986 - June, 1992), Bulawayo, Zimbabwe. Formerly Andrews University, Solusi College

Other Employment

Coordinator, Commonwealth Network of Information Technology for Development (COMNET-IT) (September, 1993 - December, 1995), London, United Kingdom. Now COMNET Foundation, (www.comnet.mt based in Malta) Commonwealth Secretariat, Pall Mall

Vice-Principal for Financial Administration, Solusi University (January, 1990 - June, 1992), Bulawayo, Zimbabwe. Responsible for the University's financial management and the management of all business services and operations including a commercial farm.

Accountant/Assistant Treasurer, Ontario Conference of Seventh-day Adventist (August, 1980 - September, 1984), Oshawa, Canada-Ontario.

C. PROFESSIONAL HONOURS

2021 – 2022: Outstanding services as Conference co-Chair, International Conference on Information Resources Management.

2021: Outstanding Contribution in Reviewing, European Journal of Information Systems.

2018: Best Paper Award, Association for Information Systems (AIS) Special Interest Group on Adoption and Diffusion of Information Technology. 2018 Best Paper Award (with Tim Smith) at the 28th Annual Workshop of the Association for Information Systems (AIS) Special Interest Group on Adoption and Diffusion of Information Technology December 13, 2018 in San Francisco, for the paper "Dialectics of Routine Performance: A Framework for Investigating Technology Adoption as a Process of Routine Disruption and Renewal"..

2016: Distinguished Man of Honour, Black Business Professional Association (BBPA) of Canada.

2015: Outstanding Services as Conference co-Chair, International Conference on Information Resources Management. Ottawa, Ontario.

2013: Outstanding Services as Conference co-Chair, International Conference on Information Resources Management. Natal, Brazil.

2010: Medallion from the Mayor, City of Ottawa. For service on two city-wide task forces: The e-Government and IT Taskforce and the Governance Taskforce set up by the Mayor in 2008 and 2009 respectively. The citation reads "Presented with gratitude to an Agent of Change by His Worship Larry O'Brien, 58th Mayor of the City of Ottawa."

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		2		2
Articles-in-Progress (All)		3		3
Publications in Conference Proceedings (Refereed)	1	2		3
Paper Presentations (Refereed)		4		4
Research Report, Non-Refereed		1		1
Grants - Funded (both refereed and non-refereed)		6		6
Grants - Pending (both refereed and non-refereed)		2		2
Totals	1	20		21

Refereed Scholarly Publications

Articles in Refereed Journals

Dabiran, E., Farivar, S., Wang, F., & Grant, G. (2024). Virtually Human: Anthropomorphism in Virtual Influencer Marketing. *Journal of Retailing and Consumer Services*, 79. [A]

Weeger, A., Wang, X., Gewald, H., Raisinghani, M., Sanchez, O., Gerald Grant & Siddhi Pittayachawan (2020). Determinants of intention to participate in corporate BYOD-programs: the case of digital natives. *Information Systems Frontiers*. [A]

Open Access article published on April 26, 2018

Published on Jan 31, 2020. Open Access

Chevers, D. A., & Grant, G. (2019). Developers' views on the adoption and benefits of software process improvement programs in Canadian software development firms. *International Journal of Business Information Systems*, 32 (2), 238-252. [C]

Updated as published on Jan 30, 2020. Flagged as forthcoming in 2019

Gewald, H., Wang, X., Weeger, A., Raisinghani, M.S., Grant, G., Sanchez, O., & Pittayachawan, S (2017). Millennials' Attitude towards Information Technology in the Workplace – A Generation of Cherry-Pickers? *Communications of the ACM*, 60 (10), 62-59. [A]

Chevers, D.A., & Grant, G. (2017). Information systems quality and success in Canadian software development firms. *Information Resources Management Journal*, 3 (30), 1-25. [C]

Chevers, D.A., & Grant, G. (2017). Developers' views on information systems quality and success in Canadian software development firms. *Journal of Information Systems and Technology Management*, 14 (1), 3-20. [B]

Chevers, D.A., & Grant, G. (2016). Software process improvement adoption and benefits in Canadian and English-speaking Caribbean software development firms. *Electronic Journal of Information Systems in Developing Countries*, 8 (77), 1-15. [C]

Uruthirapathy, A., & Grant, G. (2015). The Influence of Job Characteristics on IT and Non-IT Job Professional's Turnover Intentions. *Journal of Management Development*, 34 (6), 715-728. [C]

Dolci, P. C., Maçada, A. C., & Grant, G. (2015). Exploring Information Technology and Supply Chain Governance: case studies in two Brazilian Supply Chains. *Journal of Global Information Management*, 23 (3), 72-91. [A]

Dolci, P. C., Maçada, A. C., & Grant, G. (2014). IT investment management and information technology portfolio management (ITPM): Brazilian case studies. *Journal of Enterprise Information Management*, 27 (6), 802-816. [A]

Mann, H., Grant, G., & Mann, I. J. (2011). City E-Government: Scope and its realization. *International Journal of Electronic Government Research*, 7 (1), 38-50. [C]

Rose, W. R., & Grant, G. (2010). Critical issues pertaining to the planning and implementation of e-government initiatives. *Government Information Quarterly*, 27, 26-33. [B]

Brown, A. E., & Grant, G. (2010). Highlighting the duality of the ICT and Development Research Agenda. *Information Technology for Development*, 16 (2), 96-111. [B]

Cater-Steel, A., Hine, M., & Grant, G. (2010). Embedding IT Service Management in the Academic Curriculum: A Cross-national Comparison. *Journal of Global Information Technology Management*, 13 (4), 64-92. [B]

special issue in [Global Issues in IT Servitization and IT Service Management](#)

Kim, D., & Grant, G. (2010). E-government maturity model using the capability model integration. *Journal of Systems and Information Technology*,

Articles in Refereed Conference Proceedings

Full Paper

- Dabiran, E., Farivar, S., Wang, F., & Grant, G. (2023). Engaging with virtual influencers: a netnography study. *ECIS*.
- Grant, G., & Chowdhury, S. S. (2022). Blockchain-based vaccine passports: A multi-case analysis based on perceived risk facets. *International Conference on Information Resources Management (Conf-IRM)*.
- Grant, G., & Xu, J. (2022). Validating a questionnaire on physical environment factors associated with remote work. *International Conference on Information Resources Management (Conf-IRM)*.
- Smith, T., & Grant, G. (2018). Dialectics of Routine Performance: A Framework for Investigating Technology Adoption as a Process of Routine Disruption and Renewal. *Association for Information Systems*.
28th Annual Workshop of the Association for Information Systems (AIS) Special Interest Group on Adoption and Diffusion of Information Technology in San Francisco, December 13, 2018 (BEST PAPER)
- Wood, D., & Grant, G. (2017). Social construction of appropriate use of enterprise social media,. *Americas Conference on Information Systems*.
Boston, August 10-12.
- Gamache-O'Leary, V., & Grant, G. (2017). Social media in healthcare. *Hawaii International Conference on System Sciences (HICSS)*.
January 4-7, Waikoloa, Hawai'i.
- Weeger, A., Wang, X., Gewald, H., Prospero Sanchez, O., Grant, G., Raisinghani, M., Pittayachawan, S. (2015). Determinants of intention to participate in corporate BYOD-programs. *Academy of Management (AOM)*.
August 7-11, 2015. Vancouver, British Columbia.
- Nsakanda, A., Grant, G., Vafaei, M., & Leafloor, M. (2015). A simulation modeling approach to understanding workflow changes in healthcare: The case of CPOE deployment at The Ottawa Hospital. *Hawaii International Conference on System Sciences (HICSS)*.
January 5-8, 2015. Kauai, Hawaii.
- Dolci, P. C., Maçada, A. C., & Grant, G. (2015). Understanding the influence of IT investment on supply chain governance. *Hawaii International Conference on System Sciences (HICSS)*.
January 5-8, 2015. Kauai, Hawaii.
- Smith, T., Grant, G., & Ramirez, A. (2014). Investigating the influence of psychological ownership and resistance on usage intention among physicians. *Hawaii International Conference on System Sciences (HICSS)*.
Waikoloa, Hawaii.
- Dolci, P. C., Maçada, A. C., & Grant, G. (2013). Information technology and supply chain governance: A conceptual model. *European Conference on Information Systems (ECIS)*.
June 5-8, 2013. Utrecht, Netherlands.
- Muegge, S. M., & Grant, G. (2013). An institutional perspective on participation in business ecosystems, communities, and platforms. *Academy of Management (AOM)*.
August 9-13, 2013. Lake Buena Vista, Florida, USA.
- Hudson, D., & Grant, G. (2013). A Theory of the Firm perspective on entrepreneurial use of consumer IT as corporate IT. *International Conference on Information Resources Management (Conf-IRM)*.
May 22-24, 2013. Natal, Brazil.
- Dolci, P. C., Maçada, A. C., & Grant, G. (2012). IT Investment Management based on Information Technology Portfolio Management (ITPM): a Study in Brazilian Companies. *International Conference on Information Resources Management (Conf-IRM)*.
May 21-23, 2012. Vienna, Austria.
- Dolci, P. C., Maçada, A. C., Grant, G., & Koufteros, X. (2012). Analyzing supply chain governance conceptions and elements from theories of governance perspectives: the proposal of a conceptual model. *International Conference on Operations and Supply Chain Management (ICOSCM)*.
July 14-18, 2012. Xi'an, China. Best Track Paper Award.
- Dolci, P. C., Maçada, A. C., Grant, G., & Koufteros, X. (2012). Supply Chain Governance and Information Technology: Exploratory Case Studies in Two Brazilian Supply Chains. *International Conference on Operations and Supply Chain Management (ICOSCM)*.
July 14-18, 2012. Xi'an, China.
- Louis, C., & Grant, G. (2010). An Assessment of factors affecting Technology Adoption by Teachers: The case of Caribbean Secondary Schools. *International Conference on Information Resources Management (Conf-IRM)*.
May 16-18, 2010. Montego Bay, Jamaica.
- Thomas, A., & Grant, G. (2010). A study of Corporate Performance Management (CPM) Systems from a Dynamic Capability Perspective. *International Conference on Information Resources Management (Conf-IRM)*.
May 16-18, 2010. Montego Bay, Jamaica.
- Grant, G., & Ulbrich, F. (2010). Governance of IT-Shared Services: Moving Between Hierarchical and Networked Service Provision. *International Conference on Information Resources Management (Conf-IRM)*.

May 16-18, 2010. Montego Bay, Jamaica.

Abstract Only

Xu, J., & Grant, G. (2024). The Impact of Algorithmic Management on Digital Platform Workers and Their Responses. *Americas Conference on Information Systems (AMCIS)*.

Edited Books

Grant, G., & Collins, R. (2016). *The Value Imperative: Harvesting value from your IT initiatives* Palgrave Macmillan.

Description: New York

Chapters in Edited Books

Dolci, P. C., Maçada, A. C., & Grant, G. (2017). Making sense of information technology investment on type of supply-chain governance. In Kosrow-Pour, M. (Ed.), *Handbook of Research on Technology Adoption, Social Policy, and Global Integration* (pp. 258-279). IGI Global. [Status: Published]

Description: doi:10.4018/978-1-5225-2668-1, Hershey, PA

Grant, G., & Charlton-Laing, C. (2015). Who should champion e-learning projects in educational institutions? The emergent roles of school leadership in a national e-learning project in a developing country. In Barclay, C. and Osei-Bryson, K-M. (Eds.), *Strategic Project Management: Contemporary issues and strategies for developing economies*, (pp. 249-268). CRC Press. [Status: Published]

Other (Non-refereed) Scholarly Publications

Articles in non-Refereed journals

Applied or Integrative/application Scholarship

Stone, C., Grant, G., & Frost, S. (2024). The Ambidextrous Micro-Enterprise: The Tradeoff between Exploration and Exploitation – Evidence from Trinidadian Micro Enterprises. *Global Journal of Entrepreneurship*, 8 (1), 27-48.

Accepted for publication Nov 8, 2023 - Published November 1, 2024

Other Publications

Newspaper Articles or Columns

2016: Grant, G., *OP-ED – Grant and Collins: Fix the Phoenix – by thinking like a farmer*.

Other Publications

2017: Gewald,, H., Wang, X., Weeger, A., Raisinghani, M.S., & Grant, G. *Millennials' Attitudes Toward IT Consumerization in the Workplace*. Communications of the ACM, October

2013: Grant, G., & Tan, F.B., *Guest Editorial: Governing IT in inter-organizational relationships: issues and future research*. European Journal of Information Systems, 22: 493-497; doi:10.1057/ejis.2013.21

2010: Grant, G., *Editorial: Reconceptualizing the concept of business and IT alignment: from engineering to agriculture*. European Journal of Information Systems, 19, pp. 619-624.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Associate Editor

2014 – 2024: Information Technology for Development Journal (International).

2014 – 2022: Information & Management (International).

2020: European Conference on Information Systems (International). Track Associate Editor

2010 – 2016: Journal of Global Information Management (International).

2010 – 2012: European Journal of Information Systems (Regional).

Editor: Guest Editor of Journal

2010 – 2013: European Journal of Information Systems (International). Special Issue "Governing IT in inter-organizational relationships", Vol. 22, Issue 5 (September 2013)

2010 – 2012: Electronic Government, An International Journal (International). Special Issue "Examining the success and failure of E-Government and E-Governance: A Developing and Developed Countries Perspective" Published 2012 Vol. 9, No. 2, 2012

Presentations

Papers Presented at Conferences

Refereed

Chowdhury, S. S. & Grant, G. (2022). *Blockchain-based vaccine passports: A multi-case analysis based on perceived risk facets*. International Conference on Information Resources Management (Conf-IRM), Oshawa, Canada-Ontario.

- Xu, J. & Grant, G. (2022). *Validating a questionnaire on physical environment factors associated with remote work*. International Conference on Information Resources Management (Conf-IRM), Oshawa, Canada-Ontario.
- Farivar, S. & Grant, G. (2021). *The Impact of News and Social Media Sentiments on Cryptocurrency Market*. Administrative Sciences Association of Canada (ASAC), Virtual, Virtual.
- Grant, G. (2020). *Delivering value from digital IT investments: a practice-focused perspective*. Latin American and Caribbean Chapter of the Association for Information Systems, Virtual, Brazil.
- Grant, G. & Collins, R. (2017). *When rigor and relevance meet: Experience from a fruitful researcher-practitioner partnership*. Americas Conference on Information Systems (AMCIS), Boston, Massachusetts.
Description: Professional Development Symposium
- Nardon, L., Grant, G., & Wang, Y. (2016). *Socio-cognitive influences on technological innovation, adoption and use*. SSHRC Fall Forum: Imagining Canada's Future, Ottawa, Canada-Ontario.
Description: SSHRC Fall Forum: Imagining Canada's Future – How can emerging technologies be leveraged to benefit Canadians, Ottawa, November 2016.
- Nsakanda, A., Grant, G., Vafei, M., & Leafloor, M. (2015). *A simulation modeling approach to understanding workflow changes in healthcare: The case of CPOE deployment at the Ottawa Hospital*. Hawaii International Conference on System Sciences (HICSS), Maui, Hawaii.
- Grant, G. & Collins, R. (2015). *Bridging the IS Research-Practice Divide: Experience from a Fruitful Researcher-Practitioner Partnership*. Americas Conference on Information Systems (AMCIS), Ottawa, Canada-Ontario.
Description: May 18-20
- Grant, G. (2012). *Understanding organizational routine evolution and change in healthcare: The case of CPOE use at The Ottawa Hospital*. IS Research Workshop, ESSEC Business School, Cergy-Pontois, France.
Description: May 14
- Brown, A. E. & Grant, G. (2011). *Informal Institutions, Decoupling, and IT Governance: Identifying the Rules-in-Use for Portfolio Prioritization in IT Shared Service Arrangements*. Organizations and Society in Information Systems (OASIS), pre-ICIS Workshop, Shanghai, China.
Description: December 4
- Grant, G. (2011). *Moving beyond the rhetoric: Achieving the reality of e-government implementation in Caribbean States*. Conference on Governance, Leadership, and Empowerment in the Caribbean, Georgetown, Grand Cayman, Unknown.
Description: University College of the Cayman Islands, March 17-18
- Uruthirapathy, A. & Grant, G. (2011, July). *Extending Work Context Characteristics for Job Design in Service Organizations*. Administrative Sciences Association of Canada (ASAC), Montreal, Canada-Quebec.
- Grant, G., Chan, Y., Duggan, E., & Tan, F. D. (2010). *Building IS Research Scholarship with relevance to the Caribbean and Latin American Regions*. International Conference on Information Resources Management (Conf-IRM), Montego Bay, Jamaica.
Description: May 16-18
- Grant, G. (2010). *Contributing to the international research agenda in Information Systems: Lessons for scholars from developing countries*. Associação Nacional de Pós-Graduação e Pesquisa em Administração, Rio de Janeiro, Brazil.
Description: September 25-29

Other Presentations

Keynote Address

2010: N-CAP - ICT Best Practices in Remote Aboriginal Communities Workshop, Iqaluit, Canada-Nunavut. April 20-21

Presentation

2023: Shared Services Canada. The Value Imperative: Delivering on Innovative and Transformational Digital Initiatives

2020: Office of the Auditor General of Canada. Seminar Leader and Presenter: Collins, R. and Grant, G. (2020) The Value Imperative for Performance Audits

2019: General Conference of Seventh-day Adventist Inter-American Division Treasurers Conference, Indianapolis, Indiana. The Value Imperative: Understanding how to deliver value from digital technology investments

2018: American Institute of CPAs (AICPA), Webinar, Virtual. Webinar Presenter: Grant, G. and Collins, R. (2018) How the CFO Can Ensure That IT Investments Produce Business Value: An Agricultural Approach, AICPA, January 31.

2017: BizTech Talk, Jamaica Computer Society, Kingston, Jamaica. Presenter: Grant, G. (2017) The Value Imperative: Harvesting value from your IT initiatives, BizTech Talk, Jamaica Computer Society, February 2, 2017.

2017: Project Management Forum, Employment and Social Development Canada, Gatineau, Canada-Quebec. Presenter: Grant, G. and Collins, R. (2017) The Value Imperative: Understanding why large-scale Information Systems are not always successfully integrated into the workplace, Project Management Forum, Employment and Social Development Canada, Place du Portage II, April 13, 2017.

2017: Deloitte CIO Fellows, Toronto, Canada-Ontario. Presenter: Grant, G. and Collins, R. (2017) The Value Imperative: Harvesting value from your IT initiatives, Deloitte CIO Fellows, Deloitte University North, April 21, 2017.

2017: World Division Treasurers Symposium, General Conference of Seventh-day Adventist, Silver Springs, Maryland. Workshop Leader and Presenter: Grant, G. (2017) The Value Imperative: Understanding why large-scale Information Systems are not always successfully integrated into the workplace, September 24, 2017

2017: CIO Summit, Toronto, Canada-Ontario. Grant, G. and Collins, R. (2017) The Value Imperative: Harvesting value from your IT initiatives

2017: ISACA Montreal, Montreal, Virtual. Webinar Presenter: Grant, G. and Collins, R. (2017) The Value Imperative: Understanding why large-scale Information Systems are not always successfully integrated into the workplace, ISACA Montreal, November 15, 2017

2017: Pay Administration Branch, Public Services and Procurement Canada, Ottawa, Canada-Ontario. Presenter: Grant, G. and Collins, R. (2017) The Value Imperative: Understanding why large-scale Information Systems are not always successfully integrated into the workplace,

2017: Innovation, Science and Economic Development Canada, Innovation Lab, Ottawa, Canada-Ontario. Nardon, L. and Grant, G. (2017) Developing a culture of innovation for Canadian organizations, IDEATE, Innovation, Science, and Economic Development Canada (ISED) Innovation Lab, October 20, 2017.

2016: CIO Forum West, La Jolla, California. The Value Imperative: Harvesting value from your IT initiatives, CIO Forum West 2016, Torrey Pines, September 12-13.

2016: Customer Professional Development Day, Marval North America, North Gower, Canada-Ontario. The Value Imperative: Harvesting value from your IT initiatives, October 20, 2016, Strathmere, North Gower.

2016: Government of Canada Interdepartmental Investment Planning and Project Management, Gatineau, Canada-Quebec. "The Value Imperative: Understanding why large-scale Information Systems are not always successfully integrated into the workplace", Community of Practitioners, Place du Portage IV, November 25.

2016: SSHRC Fall Forum: Imagining Canada's Future, Ottawa, Canada-Ontario. Nardon, L. and Grant, G. (2016) Socio-cognitive influences on technological innovation, adoption and use, Imagining Canada's Future, SSHRC's Fall Forum, November 22, Ottawa Convention and Event Centre.

2015: CFO Forum, Manhattan, New York. Getting Value from IT Investments, Harvard Club, May 7. Organized by Richmond Events

2015: CIO Forum, San Francisco, California. Getting Value from IT Investments, June 4.

2015: CFO Forum, San Francisco, California. Getting Value from IT Investments, CFO Forum, June 4

2015: International Internal Auditors, Ottawa, Canada-Ontario. Getting Value from IT Investments, September 23

2015: Council for Chief Information Officers, Conference Board of Canada, Toronto, Canada-Ontario. Getting Value from IT Investments, September 30.

2014: Municipal Information Systems Association (MISA) Conference, Ottawa, Canada-Ontario. IT Governance, June 11

2014: CIO Forum, Manhattan, New York. Getting Value from IT Investments, Harvard Club, November 6. Organized by Richmond Events.

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 4 of 4]: Grant, G. Research and Technology Initiative (CRTI), Principal Investigator, Canadian Federal Government Department. [Status: Pending]

2024 [Year 4 of 4]: Grant, G. Black Entrepreneurship Program (\$1,250,000.00), Principal Investigator, The Dream Legacy Foundation. [Status: Funded]

2024 [Year 2 of 2]: Grant, G. Connections (\$30,684.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 3 of 4]: Grant, G. Research and Technology Initiative (CRTI), Principal Investigator, Canadian Federal Government Department. [Status: Pending]

2023 [Year 3 of 4]: Grant, G. Black Entrepreneurship Program (\$1,250,000.00), Principal Investigator, The Dream Legacy Foundation. [Status: Funded]

2023 [Year 1 of 2]: Grant, G. Connections (\$30,684.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 2 of 2]: Grant, G. Knowledge Synthesis Grant (\$14,992.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 2 of 4]: Grant, G. Black Entrepreneurship Program (\$1,250,000.00), Principal Investigator, The Dream Legacy Foundation. [Status: Funded]

2021 [Year 1 of 2]: Grant, G. Knowledge Synthesis Grant (\$14,992.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 1 of 4]: Grant, G. Research and Technology Initiative (CRTI), Principal Investigator, Canadian Federal Government Department. [Status: Pending]

2021 [Year 1 of 4]: Grant, G. Black Entrepreneurship Program (\$1,250,000.00), Principal Investigator, The Dream Legacy Foundation. [Status:

Funded]

2019 [Year 4 of 4]: Grant, G. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 3 of 4]: Grant, G. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2017 [Year 2 of 4]: Grant, G. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2016 [Year 3 of 3]: Grant, G. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2016: Grant, G. & Nardon, L., Insight Grant, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016 [Year 1 of 4]: Grant, G. Insight Grant (\$57,503.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2015 [Year 2 of 3]: Grant, G. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2015: Grant, G. Accelerate (\$22,500.00), Principal Investigator, Ottawa Hospital. [Status: Funded]

2015: Grant, G. Accelerate (\$22,500.00), Principal Investigator, Mitacs. [Status: Funded]

2014 [Year 2 of 2]: Grant, G. SSHRC 4A Grant (\$1,200.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2014 [Year 2 of 2]: Grant, G. SSHRC 4A Grant (\$1,200.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2014 [Year 1 of 3]: Grant, G. Insight Grant (\$64,097.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2014: Grant, G. The Ottawa Hospital - Contract (\$8,696.00), Principal Investigator, Ottawa Hospital. [Status: Funded]

2013: Grant, G. Faculty Leadership Pilot Program (\$10,000.00), Principal Investigator, Global Affairs Canada. [Status: Funded]

2013: Grant, G. KPMG, Grantee, Department for International Development (UK). [Status: Not Funded]

2013 [Year 1 of 2]: Grant, G. SSHRC 4A Grant (\$1,200.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2013 [Year 1 of 2]: Grant, G. SSHRC 4A Grant (\$1,200.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Panelist

2012: International Conference on Information Resources Management, Vienna, Austria. Díaz Andrade, A., Grant, G., Harindranath, G., Kamel, S. and Rotchanakitumnuai, S. (2012) Sustainable ICT for Development, Panel at the 2012 International Conference on Information Resources Management, May 21-23.

2010: International Conference on Information Resources Management (Conf-IRM), Rio de Janeiro, Brazil. The 2010 International Panelist, Information Systems Division, 34th Associação Nacional de Pós-Graduação e Pesquisa em Administração (ANPAD) conference, EnANPAD 2010 September 25-29, 2010

Board Member: Advisory Board

2014 – 2024: Association of Public Sector Information Professionals.

Board Member: PRJ Editorial Review Board

2024: Information Technology for Development Journal.

Board of Directors: Moderate Involvement

2011 – 2022: Adventist Accrediting Association.

2011 – 2022: Burman University, Lacombe, Canada-Alberta.

2010 – 2012: Eastern Ontario Manufacturers Network, Ottawa, Canada-Ontario.

Board of Directors: Substantial Involvement

2018 – 2024: Connected Canadians, Ottawa, Canada-Ontario. Chair, Board of Directors
<https://www.connectedcanadians.ca/leadership> (a not-for-profit organization connecting older adults with technology training and support.)

Chair: Conference / Track / Program

2022 – 2023: Black Entrepreneurship Knowledge Hub (BEKH) Research Symposium, Ottawa, Canada-Ontario. Chair, Black Entrepreneurship Knowledge Hub (BEKH) Research Symposium, Researching Black Entrepreneurship in Canada, Ottawa, Ontario, Canada, November 17-18, 2022.

2021 – 2022: International Conference on Information Resources Management, Oshawa, Canada-Ontario.

2021: Americas Conference on Information Systems.

2015: International Conference on Information Resources Management (Conf-IRM), Ottawa, Canada-Ontario. Co-Chair

2011 – 2013: International Conference on Information Resources Management (Conf-IRM), Natal, Brazil.

2010: International Conference on Information Resources Management (Conf-IRM), Montego Bay, Jamaica. Co-Chair

Keynote Address

2010: N-CAP - ICT Best Practices in Remote Aboriginal Communities Workshop, Iqaluit, Canada-Nunavut. April 20-21

Member: Committee/Task Force

2018: Accreditation evaluating team for Adventist Accrediting Association, Silang, Cavite, Philippines. Accreditation evaluating team for Adventist Accrediting Association (AAA) visit to Adventist University of the Philippines (AUP), July 27-29, 2018

2018: Accreditation evaluating team for Adventist Accrediting Association, Silang, Cavite, Philippines. Accreditation evaluating team for Adventist Accrediting Association (AAA) visit to Adventist International Institute of Advanced Studies (AIAS), July 30 to August 1, 2018

Other Professional Service Activities

2018: Social Sciences and Humanities Research Council (SSHRC) Partnership Research Grants. Member of Expert Panel on Application #895-2018-1006

2010 – 2011: EFMD Case Writing Competition. Reviewer

Reviewer - External Tenure

2021: European Journal of Information Systems.

Reviewer: Ad Hoc Reviewer for a Journal

2024: Pacific Asia Journal of Information Systems (PAJAIS).

2023: Hawaii International Conference on System Sciences.

2020: European Journal of Information Systems.

2019: Journal of Strategic Information Systems.

2017: Journal on Information Systems in Developing Countries.

2017: Information Systems Journal.

2016: Communications of the Association for Information Systems.

2014: Journal of Information Technology.

2014: Information Technology for Development Journal.

2013: European Journal of Information Systems.

2010: European Journal of Information Systems.

Reviewer: Conference Paper

2024: International Conference on Information Resources Management (Conf-IRM).

2018 – 2019: International Conference on Information Resources Management.

2018 – 2019: Hawaii International Conference on Systems Sciences.

2016 – 2017: International Conference on Information Resources Management (Conf-IRM).

2016 – 2017: International Conference on Information Systems (ICIS).

2016: Hawaii International Conference on System Sciences (HICSS).

2014: International Conference on Information Resources Management (Conf-IRM).

Scholarly Work in Progress

Papers Under Review

Mackinnon, W. & Grant, G. (2020). "The Impact of Electronic Medical Records Systems on Healthcare Subunit Performance: A Dynamic Capabilities Study," Initial submission to *Information and Management*.

Description: Information and Management

Wang, Y., Nardon, L., & Grant, G. (2018). "Culture and Innovation: A Review of National and Organizational Dimensions," Initial submission to *Creativity and Innovation Management*.

Description: Submitted May 15, 2018,

Uruthirapathy, A. & Grant, G. (2018). "Understanding work context in Work Design: The role of qualitative analysis," Initial submission to *Journal of Business Research*.

Nardon, L., Grant, G., & Wang, Y. (2018). "Culture and technological innovation: a review of national and organizational dimensions," Initial

submission to *Creativity and Innovation Management*.

Working Papers

Dabiran, E., Farivar, S., Wang, F., & Grant, G. (2022). "Engaging with virtual influencers: a netnography study," targeted for European Conference on Information Systems.

Dabiran, E., Farivar, S., Wang, S., & Grant, G. (2022). "Engaging virtual influencers: A netnography study,," targeted for European Conference on Information Systems.

Grant, G. (2018). "Delphi Study on IT Governance."

Grant, G. & Ulbrich, F. (2018). "Performance Management and Effective IT Governance."

Description: With Dr Frank Ulbrich, Stockholm School of Economics and visiting researcher at the Sprott School of Business

Hudson, D. & Grant, G. (2018). "Measuring Mobile Technology Implementation Success: The case of iPad Deployment at TOH."

Hudson, D. & Grant, G. (2018). "Why Employees Use Their Own Consumer IT as Corporate IT," targeted for European Journal of Information Systems.

Description: Manuscript #: EJIS-ER140035

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	190	Main	100%
2023/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	186	Main	100%
2023/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	19	Main	100%
2023/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	16	Main	100%
2023/Summer	ITIS5401	Fundamentals IT Service Mgmt	0.25	153	Main	100%
2023/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	13	Main	100%
2022/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	72	Main	100%
2022/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	10	Main	100%
2022/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	26	Main	100%
2022/Winter	BUSI5481	Seminar in Information Systems II - Current Trends	0.14	2	Main	28%
2022/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	17	Main	100%
2022/Winter	BUSI6401	Seminar in Information Systems II	0.36	5	Main	72%
2021/Fall	BUSI4400	IS Strategy, Management & Acquisitions	0.5	30	Main	100%
2021/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	32	Main	100%
2021/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	36	Main	100%
2021/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	25	Main	100%
2021/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	25	Main	100%
2020/Fall	BUSI6902	Research Methodology	0.38	18	Main	100%
2020/Fall	BUSI5982	Research Methodology	0.12	6	Main	100%
2020/Fall	BUSI4400	IS Strategy, Management & Acquisitions	0.5	32	Main	100%
2020/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	22	Main	100%
2020/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	25	Main	100%
2020/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	29	Main	100%
2019/Fall	BUSI4400	IS Strategy, Management & Acquisitions	0.5	21	Main	100%
2019/Fall	BUSI6902	Research Methodology	0.37	12	Main	75%
2019/Fall	BUSI6401	Seminar in Information Systems II	0.5	5	Main	100%

2019/Fall	BUSI5982	Research Methodology	0.13	4	Main	25%
2018/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	43	Shanghai	100%
2018/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	30	Bogota	100%
2018/Winter	ITIS5403	ICT for Development	0.25	9	Main	100%
2018/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	18	Main	100%
2018/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	30	Main	100%
2017/Fall	BUSI6902	Research Methodology	0.5	6	Main	100%
2017/Fall	ITIS5414	Emerging Information Technologies & Business Innovation	0.25	5	Main	100%
2017/Fall	BUSI4400	IS Strategy, Management & Acquisitions	0.5	34	Main	100%
2017/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	30	Main	100%
2017/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	28	Main	100%
2017/Winter	ITIS5403	ICT for Development	0.25	10	Main	100%
2016/Fall	BUSI6902	Research Methodology	0.5	9	Main	100%
2016/Winter	ITIS5403	ICT for Development	0.25	7	Main	100%
2016/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	25	Main	100%
2016/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	33	Main	100%
2016/Winter	BUSI6907	PhD Thesis Tutorial	0.5	13	Main	100%
2016/Winter	BUSI6900	Directed Readings	0.5	3	Main	100%
2015/Fall	BUSI6907	PhD Thesis Tutorial	0.5	13	Main	100%
2015/Fall	BUSI6902	Research Methodology	0.5	4	Main	100%
2015/Summer	BUSI6900	Directed Readings	0.5	1	Main	100%
2015/Summer	ITIS5401	Fundamentals IT Service Mgmt	0.25	21	Bogota	100%
2015/Summer	BUSI6907	PhD Thesis Tutorial	0.5	13	Main	100%

Service to the institution (Academic)

Faculty Assignments

PhD. Comprehensive Committees:

2024-2025: Emily Jones Joannis

2024-2025: Noeline Paul

Faculty Assignments

PhD. Comprehensive Committees:

2023-2024: Thumesha Jayatilake

Faculty Assignments

PhD. Thesis Committees:

2024-2025: Arushi Sharma

Faculty Assignments

PhD. Thesis Committees:

2018-2019: External Examiner, Annamaré Wolmarans (University of Pretoria)

University Assignments

Masters Thesis Committees:

2011-2012: External Examiner, Nuket Nowlan

PhD. Thesis Committees:

2022-2023: Nuket Nowlan, Internal Examiner, School of Information Technology

External Committees**Thesis Assignments****PhD. Comprehensive Committees:**

2012-2013: University of the West Indies, 7 DBA students examined

Thesis Assignments**PhD. Thesis Committees:**

2021-2022: Bellraj Eapen, External

Thesis Assignments**PhD. Thesis Committees:**

2017-2018: External Examiner, Annamaré Wolmarans

2012-2013: External Examiner, Hamed Al-busaidi.

2012-2013: Supervisor and examiner, Christine Charlton-Laing

2010-2011: External Examiner, Willem J. J. Thompson

G. ADMINISTRATIVE RESPONSIBILITIES**Service to the Institution (Administrative)****Carleton University****Faculty Assignments****Chair:**

2020-2021: Tenure and Promotion Committee - Departmental (Cluster II)

2018-2019: Hiring Committee - Information Systems Faculty

2015-2016: Curriculum Review Committee (PhD)

H. OTHER**Selected Media Appearances: Print**

2010 - The experts speak... Postmedia News

Selected Media Appearances: Online

2018 - Where is the information in the Phoenix Information Systems?

2017 - Can your CFO trust what you are doing with IT investment money?

2017 - Believing in IT Magic!

2017 - Stop chasing the mirage of business-IT alignment. It's 2017!

2016 - Don't buy "cookie cutter" IT governance "solutions": They cannot work!

2016 - Don't invest in IT that increases information asymmetry

2016 - Make sure you understand your organization's value cycle when investing in IT

Selected Media Appearances: Print

2021 - Ottawa to fund detailed study of Black-owned businesses, The Globe and Mail.

Selected Media Appearances: Online

2022 - CBC News : Interviewed by Priscilla Ki Sun Hwang for the article "Here's what happens when your immigration application is assigned to inactive employee IDs

Selected Media Appearances: Television

2022 - Interview with Joan Chianello of CBC New for CBC News : Interview with Joan Chianello of CBC New for CBC News at 6:00 p.m. on Federal funding for black-led organizations.

Selected Media Appearances: Print

2023 - Collins and Grant: Proposed City of Ottawa Services Review takes the right approach

Selected Media Appearances: Online

2024 - TVO The Agenda with Steve Paikin : Thinking Beyond "Black Excellence" November 6th, 2024

Selected Media Appearances: Radio

2024 - CFRA 580 with Patricia Boal : February 7th, 2024

Credentials**Executive or Professional Education**

2016 - Realizing Value from IT Investments, course delivered for Chartered Professional Accountants-Ontario. Toronto, Ontario, Nov 5, 2015. [Activity: Delivery of Professional Education]

2016 - Realizing Value from IT Investments, seminar and workshop delivered for Global IT Services Advisory, General Conference of Seventh-day Adventist.. Silver Spring, Maryland, USA, March 2, 2016. [Activity: Delivery of Professional Education]

2015 - Workshop: Getting Value from IT Investments, Council for Information Technology Executives, Conference Board of Canada. Ottawa, Ontario, May 27 [Activity: Delivery of Professional Education]

Research Reports

2022: Grant, G., Wang, Y., Sharma, A., & Xu, J., Transforming work in the digital economy: The impact of digital technologies on work innovation and worker engagement., submitted to Social Science and Humanities Research Council (SSHRC) for Knowledge Synthesis Grant.

2016: Nardon, L., Grant, G., & Wang, Y., Socio Cognitive Influences on Innovation., submitted to Social Sciences and Humanities Research Council of Canada.

Curriculum Vitae - Sprott School of Business

Emily Gray, BCom
Associate Professor, Teaching Stream - Tenured, 2018
Sprott School of Business (Accounting)
Telephone: 613-520-2600 x3320
Email: emily.gray@carleton.ca
AACSB Qualification: Scholarly Practitioner (SP) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Bachelor of Commerce. Carleton University.

Title: *Co-Operative Education, Carleton University. Achieved Highest Honours for G.P.A above 11.*

Professional Certifications

Chartered Professional Accountant (CPA), 2012, Toronto, Ontario.

Chartered Accountant (CA), 2008, Toronto, Ontario.

B. EMPLOYMENT

Academic Appointments

Contract Staff – Finance Elective Module, CPA Canada – Professional Education Program (2022 - Present), Ottawa, Canada. Responsible for the oversight of the quarterly finance elective marking centre to ensure fairness to all candidates, including participation in the pre-examination centre where the marking guidelines are developed, observation of marker training, analysis of marking centre statistics – both on multiple choice questions and case questions, explanations to the Board of Examiners of candidate performance, and management of the appeals process.

Instructor III, Sprott School of Business, Carleton University (2013 - Present), Ottawa, Canada-Ontario.

- Designed, prepared and delivered classroom instruction in lecture, discussion, flipped, online synchronous and online asynchronous classroom formats for courses in the undergraduate (students in both the BCom and BIB programs), Post Baccalaureate Diploma in Accounting (PBDA), and Master of Accounting (MAcc) programs, based on the approved curricula, and developed the assignments, midterms and final examinations
- Selected and used a variety of approved course materials and teaching methods (lectures, demonstrations, discussions) to ensure needs of individual students were met
- Provided students with academic support and advice, referring them for additional assistance as required - tutor if necessary, and provided other assistance as required
- Co-ordinated multi-section first year courses: BUSI1005 (2014, 2015, 2016) and BUSI1004 (2015) and oversaw the design and delivery of various courses taught by contract instructors as their assigned course coordinator (BUSI1003, ACCT5124, ACCT5128, ACCT5129)
- As Teaching Area Coordinator for the accounting faculty group, allocated teaching assistants, organized teaching assignments, facilitated a group strategic planning process, organized EDI pedagogy training, liaised with CPA Ontario and ensured adherence to all undergraduate and PBDA accreditation requirements (2021 – present)
- As Director of the MAcc program, reviewed applications for admission, hosted monthly information sessions for prospective students, spearheaded promotion efforts, organized and presented a more robust orientation for incoming students, managed course offering calendar, chaired the MAcc CRC, managed the AOL process, cultivated the alumni network, dealt with all ad hoc issues that arose, built with the assistance of colleagues a comprehensive MAcc Case database, liaised with CPA Ontario and ensured adherence to all MAcc accreditation requirements (2021 – present)
- Participated in the Undergraduate CRC, MAcc CRC, six accounting faculty hiring committees, the social committee, the Sprott Sustainability Champions, three tenure and promotion committees, the TA taskforce, an LMS advisory committee, a Strategic Principles story-telling committee,
- Judged at the ROCA case competition at both the divisional and final rounds, providing feedback to teams for improvement (2021)
- Recruited new Sprott students through various annual recruitment events (e.g., OUF, Carleton parent's night, etc.)
- Prepared and submitted a grant proposal for provincial government funding for online course development of BUSI 2005 – Income Tax Fundamentals (2016)
- Co-ordinated and directed the Sprott Competes program, an extra-curricular program designed to train our top students for, and take them to, international business case competitions. The co-ordination of this program involved a significant time commitment of administrative work, fundraising, and assistant coaching/coaching of all elite and training teams (2014-2017)
 - Instructed annually at three MBA orientations on case learning (2014-2016)

Contract Instructor, Sprott School of Business, Carleton University (2010 - 2012), Ottawa, Canada-Ontario.

- Planned, prepared and delivered classroom instruction based on the approved curricula, and developed the assessment materials
- Provided students with academic support and advice

Courses Taught

Undergraduate

- BUSI 1001 – Principles of Financial Accounting (F13)
- BUSI 1002 – Management Accounting (W14)
- BUSI 1004 – Financial Accounting for Business Students (F13, F15)
- BUSI 1005 – Managerial Accounting for Business Students (W15, F15, W16)
- BUSI 2002 – Intermediate Accounting 2 (W10*, S10*, co-taught W15)
- BUSI 2005 – Income Tax Fundamentals (online: W17, S17)
- BUSI 3005 – Taxation 1 (F14, W15, F15, W16, F16, W17)
- BUSI 3800 – Business Case Analysis (co-taught F14)
- BUSI 4002 – Advanced Accounting Problems (F11*, W12*)

Graduate

- ACCT 5129 – Professional Accounting Cases 1 (S15, W16, S16, W17, S17)

** taught as contract instructor*

Teaching Assistant, Sprott School of Business, Carleton University (2004 - 2005), Ottawa, Canada-Ontario.

- Scheduled and maintained regular office hours to meet with students to discuss material, assignments and/or exams
- Evaluated and graded examinations, assignments, and papers, and recorded grades
- Met with students to provide feedback on grades, and assignments.

Other Employment

Multiple Choice and Case Question Reviewer, CPA Canada – Post Designation Public Accounting Program Evaluation Centre (2019 - Present), Ottawa, Canada-Ontario.

- Reviewed multiple choice questions developed for Core 1 and Assurance PEP module exams for assessment quality and technical correctness, providing recommending changes, in the following areas: Financial Reporting (both IFRS and ASPE), Assurance and Data Analytics/Information Systems
- Reviewed case questions developed for various PEP module exams for technical accuracy in the following areas: Financial Reporting, Assurance, Taxation, Finance

Task-Based Simulation Author-Trainer & Reviewer, CPA Canada – Post Designation Public Accounting Program Evaluation Centre (2019 - Present), Ottawa, Canada-Ontario.

- Developed and provided in-person and on-line training to authors preparing questions in a task-based simulation format for the first time
- Provided guidance to authors as the questions and solutions were being developed for improvement
- Reviewed task-based simulations developed for Core 1 and Assurance PEP module examinations for assessment quality and technical correctness, providing recommending changes, in the following areas: Financial Reporting (both IFRS and ASPE) and Assurance
- Reviewed task-based simulations developed for Core 1 and Taxation modules education program to determine if assessment quality and difficulty level were appropriate

Leader, CPA Canada – Post Designation Public Accounting Program Evaluation Centre (2018 - Present), Ottawa, Canada-Ontario.

Leader, CPA Canada – CFE, Evaluation Centre (2016 - Present), N/A, Canada.

As the Team Leader of the Day 2 – Assurance Role question at 3 CFE marking centres, led a team of 18-62 markers responsible for evaluating the competency ratings for each examination, and supervised the assistant team leaders in the role (1,200 – 6,700 exam papers per centre) over a 3-week period.

Task-Based Simulation Author, CPA Canada (2013 - Present), N/A, Canada. Developed task-based simulations for Core 1, Core 2 and Taxation Elective modules in the areas of Financial Reporting, Management Accounting, Assurance, Finance and Taxation for the CPA module examinations

Multiple Choice Question Author, CPA Canada/CMA Ontario (2012 - Present), N/A, Canada. Core 1 Module: CPA Canada (Pro Exam), Technical Proficiency Examination Development Workshop: CMA Ontario

- Developed multiple choice questions in the area of Taxation and Assurance for the CPA Taxation and Assurance modules
- Developed multiple choice questions in Financial Reporting in both IFRS and ASPE for CPA Core 1 module and the CMA Technical Proficiency Examination
- Reviewed multiple choice questions of peers, providing feedback regarding technical correctness and clarity

Professional Examination Case Author, CICA/CPA Canada (2009 - Present), N/A, Canada.

Responsible for the development of multi-disciplinary cases for national professional examinations (see appendix), and made valuable contributions to other cases at writing workshops over the course of these nine years

- 18 multi-disciplinary cases for the UFE/CFE

- 19 cases for Core 1, Core 2, Finance and Assurance modules of the Professional Education Program (PEP) national exams
- Contributed to 2 group-authored Day 2 case for the CFE (common assessment opportunities in Financial Reporting and Management Accounting, 1 for Assurance role)
- 1 case for the CMA public licensure examination
- Authored additional Assessment Opportunities to lengthen pre-developed Taxation Elective module cases

Assistant Team Leader, CICA/CPA Canada, Evaluation Center (2009 - 2015), Ottawa, Canada.

- As the Leader at four PDPA marking centre, developed the marking guidelines for the exam, and marked/arbitrated the exams
- As the Team Leader or Assistant Team Leader of the Day 2 – Assurance Role question at 6 CFE marking centres, developed the marking guidelines for the exam, trained and led a team of 6-62 markers responsible for evaluating the competency ratings for each examination, and supervised the assistant team leaders in the role (1,200 – 6,700 exam papers per centre) over a 3-week period
- As the Team Leader of the Assurance Elective Module marking centre, developed the marking guideline for the exam, trained and led a team of 12 markers responsible for evaluating the competency ratings set, and supervised the assistant team leader over a 1-week period
- As an Assistant Team Leader of a multidisciplinary case question at 6 UFE marking centres, directly supervised a team of six to eight academics and professionals in the review of over 4000 exams per centre over a 3-week period
 - Conducted evaluations on each marker and made required rulings based on discrepancies between different markers
 - Prepared and delivered performance appraisal reviews (PAR) to unsuccessful candidates, providing feedback and training for future exams

Task-Based Simulation Author, Core 1 and 2 Modules, CPA Canada (2013), N/A, Canada.

Developed task-based simulations in the areas of Financial Reporting, Management Accounting, Audit and Assurance, Finance and Taxation for the CPA Core 1 and Core 2 module examinations.

Financial Planning Unit, Canadian Institutes of Health Research (2010 - 2013), N/A, Canada. Budget preparation, forecasting and monitoring, review of funding opportunities, funding results and contracts.

Marker and Arbitrator, CICA, CICA-Evaluation Centre (2012), N/A, Canada.

- Participated as one of 16-22 markers responsible for marking approximately 4,000 exams over a nine-day period
- Acted as an Arbitrator responsible for making judgement calls on competency levels awarded for each question

Case Exam Consultant, Integrated Study Program and Licensure Exam Summer Workshop, CMA Ontario (2011), N/A, Canada-Ontario.

- Provided advice on the nature of non-comprehensive and comprehensive accounting case questions in development at CMA authoring working, and the make-up of the Integrated
- Study Program practice exam and final exam, and the Public Licensure Exam so that it satisfied the requirements of the UFE Competency Map
- Reviewed questions authored for appropriateness of professional level, integration of competencies and technical correctness

Consultant, Development of Public Licensure Program, CMA Ontario (2010), N/A, Canada-Ontario.

- Reviewed proposed Technical Proficiency Exam (multiple choice entrance exam) question bank in accounting, assurance, finance, taxation, management decision making and governance/risk management/strategy
- Reviewed proposed lecture and case material for Integrated Study Program (three week intensive program in case writing), proposed examinations for Integrated Study Program practice and final exam, and the Licensure exam
- Provided critiques, suggestions and corrections for all of the above based on technical requirements (Income Tax Act, CICA Handbook), the UFE Competency Map and professional experience in case writing, marking and authoring obtained through work for the CICA.

Marker, Certified General Accounts (CGA), CGA Canada (2006 - 2010), N/A, Canada.

- Marker responsible for evaluating over 3300 exams under the supervision of Darrell Herauf, CPA CA, CGA

Assurance & Advisory Unit, Private Client Services, Deloitte & Touche LLP (2008 - 2009), N/A, Unknown. Audit review engagements, corporate and personal tax return preparation.

Marker and Arbitrator, CICA, CICA-Evaluation Centre (2008), N/A, Canada.

- Participated as one of sixteen markers responsible for marking 3800 exams over a nine day period
- Acted as an Arbitrator responsible for making judgement calls on competency levels awarded for each question.

Private Client Services, Scott, Rankin & Gardiner (2004 - 2008), N/A, Unknown. Audit & review engagements, corporate and personal tax return preparation.

C. PROFESSIONAL HONOURS

2023: FCPA Designation, CPA Ontario.

2017: Professional Achievement Award for Instructor Employees, Carleton University. Professional Achievement Award for Instructor Employees, \$10,000. Awarded annually to five instructor employees to recognize outstanding professional achievements at Carleton University..

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Refereed Scholarly Publications

Other (Non-refereed) Scholarly Publications

Chapters in non-refereed books

Gray, E. (2016). CONFIDENTIAL CFE Board Report Case. *Common Final Examination (CFE)*. CPA Canada.

Description:

Gray, E. (2016). CONFIDENTIAL CFE Board Report Case. *Common Final Examination (CFE)*. CPA Canada.

Description:

Gray, E. (2015). CONFIDENTIAL UFE Board Report Case. *Chartered Accountants of Ontario*. Uniform Final Evaluation (UFE).

Description: 1 of 2

Gray, E. (2015). CONFIDENTIAL UFE Board Report Case. *Chartered Accountants of Ontario*. Uniform Final Evaluation (UFE).

Description: 2 of 2

Gray, E. (2011). CONFIDENTIAL UFE Board Report Case. *Chartered Accountants of Ontario*. Uniform Final Evaluation (UFE).

Description: 1 of 2

Gray, E. (2011). CONFIDENTIAL UFE Board Report Case. *Chartered Accountants of Ontario*. Uniform Final Evaluation (UFE).

Description: 2 of 2

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board of Directors: Substantial Involvement

2012 – 2015: Clean Air Champions. Treasurer

Member: Committee/Task Force

2023: Chartered Professional Accountants of Canada (CPA Canada). Certification 2.0 Assessment Committee

2022: CPA Ontario. Certification 2.0 Learning Outcomes Working Group: subject matter expert for Management Decision Making and Information Systems

2020 – 2021: Chartered Professional Accountants of Canada (CPA Canada). CPA Competency Map Task Force (CMTF) – Discussion forum member

2014 – 2017: Chartered Professional Accountants of Ontario.

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	ACCT5137	Professional Accounting Cases II	0.25	20	Main	100%
2024/Winter	BUSI2005	Income Tax Fundamentals	0.5	41	Main	100%
2023/Summer	ACCT5136	Advanced Integration II	0.17	4	Main	33%
2023/Summer	ACCT5136	Advanced Integration II	0.17	9	Main	34%
2023/Summer	ACCT5136	Advanced Integration II	0.17	9	Main	33%
2023/Summer	ACCT5129	Professional Accounting Cases I	0.13	9	Main	50%
2023/Summer	ACCT5129	Professional Accounting Cases I	0.13	13	Main	50%
2023/Winter	BUSI1004	Financial Accounting for Business Students	0.5	90	Main	100%

2022/Summer	ACCT5136	Advanced Integration II	0.17	7	Main	34%
2022/Summer	ACCT5136	Advanced Integration II	0.17	7	Main	34%
2022/Summer	ACCT5136	Advanced Integration II	0.17	9	Main	34%
2022/Winter	BUSI3005	Taxation I	0.5	30	Main	100%
2021/Summer	ACCT5136	Advanced Integration II	0.16	4	Main	32%
2021/Summer	ACCT5136	Advanced Integration II	0.17	10	Main	34%
2021/Summer	ACCT5136	Advanced Integration II	0.17	8	Main	34%
2020/Winter	BUSI2005	Income Tax Fundamentals	0.5	68	Main	100%
2019/Fall	ACCT5129	Professional Accounting Cases I	0.25	28	Main	100%
2019/Fall	ACCT5129	Professional Accounting Cases I	0.25	28	Main	100%
2019/Winter	ACCT5129	Professional Accounting Cases I	0.25	17	Main	100%
2019/Winter	BUSI3005	Taxation I	0.5	16	Main	100%
2019/Winter	BUSI2005	Income Tax Fundamentals	0.5	49	Main	100%
2017/Summer	ACCT5129	Professional Accounting Cases I	0.25	25	Main	100%
2017/Summer	ACCT5129	Professional Accounting Cases I	0.25	21	Main	100%
2017/Summer	BUSI2005	Income Tax Fundamentals	0.5	25	Main	100%
2017/Winter	BUSI2005	Income Tax Fundamentals	0.5	60	Main	100%
2017/Winter	ACCT5129	Professional Accounting Cases I	0.25	9	Main	100%
2017/Winter	BUSI3005	Taxation I	0.5	46	Main	100%
2016/Fall	BUSI3005	Taxation I	0.5	58	Main	100%
2016/Summer	ACCT5129	Professional Accounting Cases I	0.25	35	Main	100%
2016/Winter	BUSI3005	Taxation I	0.5	50	Main	100%
2016/Winter	BUSI1005	Managerial Accounting for Business Students	0.43	92	Main	86%
2016/Winter	ACCT5129	Professional Accounting Cases I	0.25	7	Main	100%
2016/Winter	BUSI1005	Managerial Accounting for Business Students	0.07	15	Main	14%
2015/Fall	BUSI1004	Financial Accounting for Business Students	0.07	14	Main	14%
2015/Fall	BUSI1004	Financial Accounting for Business Students	0.5	96	Main	100%
2015/Fall	BUSI1004	Financial Accounting for Business Students	0.43	88	Main	86%
2015/Summer	ACCT5129	Professional Accounting Cases I	0.25	32	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: Curriculum Review Committee (MBA)

2022-2023 – 2023-2024: Curriculum Review Committee (MAcc)

2021-2022: Curriculum Review Committee (MAcc) (Co-Chair)

Credentials

Professional Development

Professional Seminars / Workshops

2023: Canadian Academic Accounting Association (CAAA).

Fundamentals of Sustainability Accounting – Level I & Level II, IFRS Foundation

2022: Power Up Your Grading. online training, Teaching & Learning Services, Carleton

2022: Driving Business Value with Data Science. Online training module , CPA Ontario

2022: Foundations in Data Science. online training module, CPA Ontario

2022: AI and the Future of Accounting. online training module, CPA Ontario

2021: Bias in Peer Review. Bias in Peer Review, e-learning module, NSERC, SSHRC, Canada Research Chairs

2021: CPA Ontario. Tax – 5 Years of Development – online training workshop, CPA Ontario Diversity, Inclusion and the Digital Divide, webinar, CPA Ontario ESG Summit, webinar, CPA Ontario

2021: Carbon Literacy Training. Nottingham Business School

Service to the Community

Member of a Committee

2022: Federation of Citizen's Association, Representative from the WBCA

2022: Riverside United Church, Investment Committee member

2021: Event Coordinator, West Barrhaven Community Association

Other Community Service Activities

2021: Earthhub

Curriculum Vitae - Sprott School of Business

Daniel Gulanowski, PhD
Associate Professor - Tenured,
Sprott School of Business (International Business)
Telephone:
Email: daneil.gulanowski@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-5406-5086>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Carleton University.

Title: *Specialty Areas: Management and International Business Thesis: The role of online discussion forums in newcomers' labour market integration in Canada*

Master of Business Administration. Ryerson University.

Title: *Study Exchange: Tsinghua University, Beijing, China*

Bachelor of Commerce. University of Toronto.

Professional Certifications

Canadian Securities Course, 2004

B. EMPLOYMENT

Academic Appointments

Assistant Professor, International Business, Sprott School of Business, Carleton University (2019 - Present), Ottawa, Canada-Ontario.

Instructor of International Business, Sprott School of Business, Carleton University (2014 - 2018), Ottawa, Canada-Ontario.

Other Employment

Commercial Banking Manager, National Bank of Canada (2008 - 2012), Unknown, Canada.

Accountant, Amcor PET Packaging Canada Inc. (2003 - 2006), Montreal, Canada-Quebec.

C. PROFESSIONAL HONOURS

2023: Favorite Faculty Certificate, Carleton University. For recognition of efforts as a professor, as acknowledged by the students living in the residence community and studying at Carleton University..

2016: Ontario Graduate Scholarship (OGS), Government of Ontario.

2015: David and Rachel Epstein Foundation Scholarships, David and Rachel Epstein Foundation.

2014: Honourable Mention Award, International Business Division of ASAC.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		4		4
Articles-in-Progress (All)		5		5
Publications in Conference Proceedings (Refereed)		1		1
Paper Presentations (Refereed)		12		12
Grants - Funded (both refereed and non-refereed)		2	2	4
Other Research, Non-refereed		3		3

Totals		27	2	29

Refereed Scholarly Publications

Articles in Refereed Journals

Han, Y., Gulanowski, D., & Sears, G. J. (2022). International student graduates' workforce integration: A systematic review. *International Journal of Intercultural Relations*, 85, 163-189. [A]

Gulanowski, D., Nardon, L., & Hine, M. (2022). Online Discussion Forum And Pre-migration Information Seeking: An Affordance Perspective. *Journal of International Technology and Information Management*, 31 (2), 110-139. [C]

Nardon, L., Zhang, H., Szkudlarek, B., & Gulanowski, D. (2021). Identity work in refugee workforce integration: The role of newcomer support organizations. *Human Relations*, 28 (1), 29-51. [A+]

Published, 2022 update

Advance Online Publication-Forthcoming

Hine, M., Nardon, L., & Gulanowski, D. (2019). The Role of Emotional Expression in Accessing Social Networks: The Case of Newcomers' Blogs. *Journal of International Technology and Information Management*, 28 (1), 2. [C]

Gulanowski, D., Papadopoulos, N., & Plante, L. (2018). The Role of Knowledge in International Expansion: Toward an Integration of Competing Models of Internationalization. *Review of International Business and Strategy*, 28 (1), 35-60. [C]

Authors in alphabetical order indicating equal contribution; accepted October 21, 2017,

Nardon, L., Aten, K., & Gulanowski, D. (2015). Expatriate Adjustment in the Digital Age: The Co-creation of Online Social Support Resources Through Blogging. *International Journal of Intercultural Relations*, 47, 41-55. [A]

Articles in Refereed Conference Proceedings

Full Paper

Gulanowski, D., & Zhang, H. (2024). International students and workforce integration through technology. *Society of Interdisciplinary Business Research*.

Han, Y., Gulanowski, D., & Sears, G. (2021). International graduates' workforce integration: A systematic literature review. *Administrative Sciences Association of Canada*.

Gulanowski, D., & Nardon, L. (2018). The Role of Online Discussion Forums in Newcomers' Labour Market Integration in Canada. *Administrative Sciences Association of Canada (ASAC)*.

Toronto, Ontario, Canada.

Nardon, L., Aten, K., & Gulanowski, D. (2014). The Role of Blogging Technology in Expatriate Adjustment. *Administrative Sciences Association of Canada (ASAC)*.

May 2014. Honourable mention.

Abstract Only

Papadopoulos, N., Curwen, P., Gulanowski, D., & Plante, L. (2016). An Integrative and Critical Review of Research on the Psychic Distance Construct. *Administrative Sciences Association of Canada (ASAC)*.

International Business Division. June 4-6: Edmonton, AB.

Gulanowski, D., Plante, L., & Papadopoulos, N. (2015). A knowledge perspective on the Uppsala and Born Global internationalization models. *Academy of Marketing Science (AMS) World Marketing Congress*.

July 14 - 18, 2015. Bari, Italy.

Chapters in Edited Books

Papadopoulos, N., Gulanowski, D., & Plante, L. (2017). The Uppsala Model of Internationalization: A Critical Review. In C. Riaz Mafé, J. Aldas-Manzano, and C. Veloutsou (Eds.), *Communicating brands in an increasingly digital environment* (pp. 157-168). Athens, Greece: Athens Institute for Education and Research. [Status: Published]

Gulanowski, D., Plante, L., & Papadopoulos, N. (2016). A Knowledge Perspective on the Uppsala and Born Global Internationalization Models. *Rediscovering the Essentiality of Marketing* (pp. 503-504). Springer Publications. [Status: Published]

Nardon, L., & Gulanowski, D. (2015). Divergence and Convergence. In Benett, J (Ed.), *Encyclopedia of Intercultural Competence* (pp. 265-268). Thousand Oaks: Sage Publications. [Status: Published]

Other (Non-refereed) Scholarly Publications

Articles in non-Refereed journals

Applied or Integrative/application Scholarship

Gulanowski, D., & Zheng, E. (2024). Chinese Guanxi in Computer-Mediated Communications (CMC): A Scoping Review of Business and Management Studies. *Asia Pacific Management Review*.

Received 20 Sep 2023, Accepted 17 Mar 2024, Published online: 10 Apr 2024

Other Publications

Other Publications

2023: Gulanowski, D., *Facilitating workplace integration of international student graduates*.

2020: Gulanowski, D., *Finding Support in a Digital World*, Sprott Business Insights.

2020: Gulanowski, D., *Accessing Social Support Online During the COVID-19 Pandemic*, Sprott Business Insights.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Conference Proceedings

2023: Administrative Sciences Association of Canada (ASAC) (National). international Business Division

Presentations

Papers Presented at Conferences

Refereed

Gulanowski, D. & Zhang, H. (2024). *International students and workforce integration through technology*. Society of Interdisciplinary Business Research, Osaka, Japan.

Gulanowski, D. & Zhang, H. (2024). *International Knowledge Transfer and Global Mobility: A Review of Business and Management Literature*. Society of Interdisciplinary Business Research, Osaka, Japan.

Gulanowski, D. & Zhang, H. (2023). *The Role of Diaspora in International Knowledge Transfer*. STTPA Conference, Mississauga, Canada-Ontario.

Gulanowski, D. & Zheng, E. (2023). *The Role of Guanxi in Knowledge Sharing Online: A Review*. Administrative Sciences Association of Canada (ASAC), Toronto, Canada-Ontario.

Zheng, E. & Gulanowski, D. (2023). *The Role of Guanxi on Knowledge Sharing Online: A Systematic Review*. National Conference on Undergraduate Research, N/A, Wisconsin.

Gulanowski, D. (2021). *The Increasingly Significant Role of Technology in Supporting Immigrant Integration*. Work Research Forum, Ottawa, Canada-Ontario.

Han, Y., Gulanowski, D., & Sears, G. (2021). *International graduates' workforce integration: A systematic literature review*. Administrative Sciences Association of Canada, Virtual, Virtual.

Hoselton, L., Gulanowski, D., Nardon, L., & Hari, A. (2021). *The role of social capital and online social support in workforce integration of immigrant women during Covid-19*. Administrative Sciences Association of Canada, Virtual, Virtual.

Gulanowski, D. & Zheng, E. (2021). *The role of guanxi on knowledge sharing online*. Academy of International Business, Midwest Chapter, Chicago, Illinois.

Zhang, H. & Gulanowski, D. (2021). *The role of diaspora in international knowledge transfer: A narrative review*. Academy of International Business, Midwest Chapter Conference, Chicago, Illinois.

Hoselton, L., Gulanowski, D., Nardon, L., & Hari, A. (2021). *The role of social capital and online social support in workforce integration of immigrant women during Covid-19*. CRIW Virtual Early Career Researcher Conference, Ottawa, Canada-Ontario.

Gulanowski, D. & Nardon, L. (2020). *Integration of international students through technology*. Academy of International Business Southeast Chapter, Virtual, Virtual.

Gulanowski, D. & Nardon, L. (2019). *Migrants' labour market integration through online discussion forums*. STTPA Conference, Mississauga, Canada-Ontario.

Description: October 2019

Gulanowski, D. & Nardon, L. (2019). *Labour market integration in the information age: Knowledge exchange through online discussion forums*. Academy of International Business, Toronto, Canada-Ontario.

Description: May 2019

Gulanowski, D. & Nardon, L. (2018). *The Role of Online Discussion Forums in International Migrants' Occupational Integration*. Academy of International Business, Chicago, Illinois.

Gulanowski, D. & Nardon, L. (2018). *National Culture and Management: A Critical Review and Directions for Future Research*. Academy of International Business, Chicago, Illinois.

Gulanowski, D. & Plante, L. (2018). *A model of knowledge sharing in a global virtual team environment*. Academy of International Business, Chicago, Illinois.

Gulanowski, D., Plante, L., & Papadopoulos, N. (2018). *A critical review of the Psychic Distance construct in International Business research*. Academy of International Business, Kingston, Canada-Ontario.

Nardon, L., Zhang, H., Szkudlarek, B., & Gulanowski, D. (2018). *Employment Support and Refugee Workforce Integration*. Annual Conference of the Canadian Association for Refugee and Forced Migration Studies, Ottawa, Canada-Ontario.

Nardon, L., Zhang, H., Gulanowski, D., & Szkudlarek, B. (2018). *Supporting Refugee Workforce Integration: The Paradox of Managing Expectations*

and Supporting Professional Identities. European Academy of Management Conference, Reykjavik, Iceland.

Gulanowski, D. (2017). *A Critical Review of Research on the National Culture and Management*. Administrative Sciences Association of Canada (ASAC), Montreal, Canada-Quebec.

Gulanowski, D., Papadopoulos, N., & Plante, L. (2017). *Psychic Distance Construct: an integrative and critical review*. Academy of International Business, Philadelphia, Pennsylvania.

Gulanowski, D., Zhang, H., Nardon, L., & Szkudlarek, B. (2017). *Supporting newcomers: a critical review*. Academy of International Business (AIB) US Northeast Conference, Philadelphia, Pennsylvania.

Description: October, 2017.

Nardon, L. & Gulanowski, D. (2017). *Occupational integration of newcomers in the digital age*. Academy of International Business (AIB) US Northeast Conference, Philadelphia, Pennsylvania.

Description: October, 2017.

Gulanowski, D. (2016). *An Integrative and Critical Review of Research on the Psychic Distance Construct*. Administrative Sciences Association of Canada (ASAC), Edmonton, Canada-Alberta.

Gulanowski, D., Plante, L., & Papadopoulos, N. (2016). *The Uppsala Model of Internationalization: Review, Evolution, and Context*. Sprott PhD Symposium, Ottawa, Canada-Ontario.

Description: April 15.

Gulanowski, D. (2015). *Culture and behaviour in multicultural situations*. Administrative Sciences Association of Canada (ASAC), Halifax, Canada-Nova Scotia.

Gulanowski, D. (2015). *A knowledge perspective on the Uppsala and Born Global internationalization models*. Academy of Marketing Science, Bari, Italy.

Gulanowski, D. (2015). *Developing intercultural competence through reflection*. European Group for Organizational Studies (EGOS) Colloquium, Athens, Greece.

Gulanowski, D. (2014). *The Role of Blogging Technology in Expatriate Adjustment*. Administrative Sciences Association of Canada (ASAC), Muskoka, Canada-Ontario.

Gulanowski, D. (2014). *Attention to the Global Environment*. Academy of Management (AOM), Philadelphia, United States of America.

Gulanowski, D. (2013). *Bridging cultures through technology: The role of blogging in acculturation and cultural brokerage*. European Group for Organizational Studies (EGOS) Colloquium, Montreal, Canada-Quebec.

Non-Refereed

Papadopoulos, N., Gulanowski, D., & Plante, L. (2015). *Factors Affecting the International Behaviour of SMEs*. Annual Sardinia Meet: The Role of Small and Medium Sized Enterprises in Peripheral Area Development, Sardinia, Greece.

Description: July 24-25, 2015. Foundation for Local Development Thomas & Afrodete Papanikos (ITATHAP).

Other Presentations

Presentation

2022: Internship-Carleton University Research Experience for Undergraduate Students. Zheng, E., & Gulanowski, D. (2022). *The Role of Discussion Forums in Creating an Engaging Online Learning Community*. Presented at the Internship-Carleton University Research Experience for Undergraduate Students (I-CUREUS) Conference, Ottawa, Canada.

2019: Immigration, Refugees and Citizenship Canada. Gulanowski, D. (2019). *The Role of Online Discussion Forums in Newcomers' Labour Market Integration in Canada*. Presented at the Immigration, Refugees and Citizenship Canada (IRCC): Research Matters, Ottawa, Canada. *Invited Speaker; Featured Research

2017: Two Cities, Curious Minds: Graduate Research at Three Universities National Capital Region Thesis Competition, Ottawa, Canada-Ontario. *The role of online discussion forums in newcomers' occupational integration in Canada*.

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 3 of 3]: Gulanowski, D. Insight Development Grant (\$19,201.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 3]: Gulanowski, D. Insight Development Grant (\$19,201.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 2 of 2]: Gulanowski, D. Insight Development Grant (\$30,144.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 2 of 2]: Gulanowski, D. Insight Development Grant (\$31,279.00 Not Funded of a total grant amount of \$31,279.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022: Gulanowski, D. CuResearch Development Grant - SSHRC Explore (\$9,978.00 Not Funded), Principal Investigator, PRI-Carleton University. [Status: Not Funded]

2022 [Year 1 of 3]: Gulanowski, D. Insight Development Grant (\$19,201.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 1 of 2]: Gulanowski, D. Insight Development Grant (\$30,144.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 1 of 2]: Gulanowski, D. Insight Development Grant (\$31,279.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021: Gulanowski, D. Student ad Partners Program (\$4,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Gulanowski, D. I-CUREUS (\$1,125.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2020: Gulanowski, D. Start-up Funds (\$10,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Chair: Conference / Track / Program

2023: Administrative Sciences Association of Canada (ASAC). Program Coordinator

Member: Committee/Task Force

2023: Centre for Research on Inclusion at Work. Associate Director

Reviewer: Ad Hoc Reviewer for a Journal

2020: Multidisciplinary Business Review.

2017 – 2020: International Journal of Intercultural Relations.

2017: Administrative Sciences Association of Canada.

2017: Canadian Journal of Administrative Sciences.

2017: Review of International Business and Strategy.

Reviewer: Conference Paper

2020: Academy of International Business, U.S. Southeast Chapter.

2018: Academy of International Business U.S. Midwest Chapter.

2017: Academy of International Business U.S. Northeast Chapter.

Scholarly Work in Progress

Papers Under Review

Gulanowski, D. & Zheng, H. (2023). "The role of international migrants as knowledge carriers: A systematic review," Revised and resubmitted.

Gulanowski, D. & Nardon, L. (2020). "Online discussion forums and newcomers' labor market integration," Initial submission to *International Migration*.

Hine, M., Gulanowski, D., & Nardon, L. (2018). "Emotional expression and access to social networks: a text analysis of newcomers' blogs.," Initial submission to *Journal of Global Mobility: The Home of Expatriate Management Research*.

Working Papers

Gulanowski, D., Sears, G., & Ng, E. (2024). "International students and workforce integration through technology: The future of Canada's prosperity."
Description: Research project

Nardon, L., Sears, G., Gulanowski, D., & Han, Y. (2023). "Enhancing labour outcomes through sector-specific initiatives."

Sears, G., Gulanowski, D., Han, Y., & Ng, E. (2023). "Promoting Retention, Inclusion, and Integration of International Graduates."
Description: Research project

Gulanowski, D. (2023). "The Impact of Online Discussion Boards on Teaching and Learning International Business."
Description: Research project

Nardon, L., Szkudlarek, B., Gulanowski, D., & Zhang, H. (2018). "Social support and newcomers' work adjustment: a literature review and future research agenda," targeted for International Journal of Intercultural Relations.

Papadopoulos, N., Gulanowski, D., Plante, L., & Nardon, L. (2018). "Knowing, Feeling, Doing: Cognitive, Affective, and Conative Factors in Internationalization and Export Development," targeted for International Journal of Export Marketing.

Papadopoulos, N., Gulanowski, D., & Plante, L. (2018). "An integrative and critical review of research on the psychic distance construct.," targeted for International Marketing Review.

Gulanowski, D. & Nardon, L. (2018). "Newcomers integration and computer mediated interactions.," targeted for Computers in Human Behavior.

Gulanowski, D. & Nardon, L. (2018). "The role of online discussion forums in newcomers' labour market integration in Canada.," targeted for Journal of World Business.

Nardon, L., Zhang, H., & Gulanowski, D. (2018). "Supporting refugee workforce integration: connecting the past, present and future," targeted for Organization Studies.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2023/Fall	BUSI2701	Fundamentals of International Business	0.5	79	Main	100%
2023/Fall	BUSI2701	Fundamentals of International Business	0.5	78	Main	100%
2023/Fall	BUSI1701	Introduction to International Business	0.5	33	Main	100%
2023/Fall	BUSI3704	International Business Environment	0.5	50	Main	100%
2023/Winter	BUSI2701	Fundamentals of International Business	0.5	80	Main	100%
2022/Fall	BUSI2701	Fundamentals of International Business	0.5	80	Main	100%
2022/Fall	BUSI2701	Fundamentals of International Business	0.5	79	Main	100%
2022/Fall	BUSI1701	Introduction to International Business	0.5	54	Main	100%
2021/Fall	BUSI2701	Fundamentals of International Business	0.5	78	Main	100%
2021/Fall	BUSI2701	Fundamentals of International Business	0.5	78	Main	100%
2021/Fall	BUSI1701	Introduction to International Business	0.5	65	Main	100%
2021/Summer	BUSI2701	Fundamentals of International Business	0.5	73	Main	100%
2021/Winter	IBUS5701	International Business	0.25	18	Main	100%
2020/Fall	BUSI2701	Fundamentals of International Business	0.5	79	Main	100%
2020/Fall	BUSI1701	Introduction to International Business	0.5	71	Main	100%
2020/Fall	IBUS5701	International Business	0.25	22	Main	100%
2020/Fall	BUSI2701	Fundamentals of International Business	0.5	78	Main	100%
2019/Fall	BUSI2701	Fundamentals of International Business	0.5	76	Main	100%
2019/Fall	BUSI1701	Introduction to International Business	0.5	63	Main	100%
2019/Fall	BUSI2701	Fundamentals of International Business	0.5	77	Main	100%
2019/Summer	IBUS5701	International Business	0.25	4	Main	100%
2019/Summer	BUSI2701	Fundamentals of International Business	0.5	59	Main	100%
2018/Fall	IBUS5701	International Business	0.25	21	Main	100%
2018/Fall	BUSI2701	Fundamentals of International Business	0.5	71	Main	100%
2018/Fall	BUSI2701	Fundamentals of International Business	0.5	77	Main	100%
2018/Fall	IBUS5701	International Business	0.25	27	Main	100%
2018/Fall	BUSI2701	Fundamentals of International Business	0.5	78	Main	100%
2017/Summer	BUSI2701	Fundamentals of International Business	0.5	66	Main	100%
2015/Fall	BUSI2701	Fundamentals of International Business	0.5	87	Main	100%
2015/Fall	BUSI2702	Intro International Management	0.5	16	Main	100%
2015/Fall	BUSI2702	Intro International Management	0.5	29	Main	100%

2015/Fall	BUSI2701	Fundamentals of International Business	0.5	85	Main	100%

Service to the institution (Academic)

Faculty Assignments

PhD. Comprehensive Committees:

2022-2023: Tasnuva Chaudhury

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: Centre for Inclusion in Work (Co-Chair)

Credentials

Professional Memberships

Academy of International Business U.S. Midwest Chapter, -
 Academy of International Business U.S. Northeast Chapter, -
 The Academy of International Business (AIB), -
 The Academy of Management (AOM), -
 The Administrative Sciences Association of Canada (ASAC), -

Professional Development

Other Professional Development

2023: Administrative Sciences Association of Canada (ASAC). Symposium - Finding Our Way with Artificial Intelligence Powered Virtual Work-Integrated Learning in Business Programs

2023: Administrative Sciences Association of Canada (ASAC). Symposium - AI in Management Education: Resist, Submit, or Embrace?

Professional Seminars / Workshops

2024: Academy of International Business. Recent Advances in international Leadership
 2024: Academy of International Business. An Introduction to Reflexive Thematic Analysis
 2024: Harvard Business Publishing Education. ChatGPT Strategies You Can Implement Today to Enhance Your Class Sessions
 2023: Academy of International Business. Qualitative Comparative Analysis Techniques and IB Research
 2023: Academy of International Business. A Global Perspective on DEI in IB Education - Sessions 1 & 2
 2023: Academy of International Business. Introducing the AIB-CIBER Certificate Program in International Business
 2023: Academy of International Business. Digital Technologies' Impact on IB Models and Processes
 2023: Academy of International Business. MNEs' Engagement with Political Actors in Host Countries
 2023: Academy of International Business. MNEs' Navigation of Rising Nationalism and Political Tensions
 2023: Academy of International Business. IB Teaching Innovations – Lessons from Outstanding Educators
 2023: Harvard Business Publishing Education. Will AI Replace the Educator?
 2023: Harvard Business Publishing Education. How ChatGPT and Other AI Tools Can Maximize the Learning Potential of Your Case-Based Classes
 2023: Harvard Business Publishing Education. Unlocking the Power of AI: How Tools Like ChatGPT Can Make Teaching Easier and More Effective
 2023: Academy of Management (AOM). International Management Division Research and Teaching Webinars - IB research in an era of Industry 4.0
 2023: Academy of International Business. A Global Perspective on DEI in IB Education
 2023: Academy of International Business. Social Network Analysis in International Business Research
 2022: Digital technology and international entry modes: New trends, databases and research areas. Time for some new theories. - AOM IM Division Research Webinar.
 2022: The Role of Global Mobility in Knowledge Transfer - AIB Journals Webinar.
 2022: Moving Beyond Templates in Qualitative IB Research - AIB SIGs Webinar.
 2022: Digitization and Internationalization: Insights from Qualitative Research - AOM IM Division Research Webinar.

2022: Experiential Learning Best Practices & Approaches - AIB SIGs Webinar.

2022: Giving Students Real-World Experience Through Simulations: Road-Tested.

Service to the Community

Chair of a Committee

2024: International Business Division, Administrative Sciences Association of Canada

Curriculum Vitae - Sprott School of Business

Sefa Hayibor, PhD
Associate Professor - Tenured, 2012
Sprott School of Business (Management and Strategy)
Telephone: 613-520-2600 x2202
Email: sefa.hayibor@carleton.ca
AACSB Qualification: Additional (A) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Pittsburgh.
Title: *Katz Graduate School of Business Dissertation: Equity and Expectancy Considerations in Stakeholder Action, Dec., 2005.*
Master of Business Administration. Simon Fraser University.
Bachelor of Business Administration. Simon Fraser University.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (2012 - Present), Ottawa, Canada-Ontario.
Assistant Professor, Sprott School of Business, Carleton University (2008 - 2012), Ottawa, Canada-Ontario.
Assistant Professor, Sobey School of Business, Saint Mary's University (2006 - 2008), Halifax, Canada-Nova Scotia.
Lecturer, Sobey School of Business, Saint Mary's University (2005), Halifax, Canada-Nova Scotia. B.Com Program
Adjunct Instructor, College for Graduate Studies, Chatham University (2004), Pittsburgh, Pennsylvania.
Adjunct Instructor, Palumbo-Donahue School of Business, Duquesne University (2004), Pittsburgh, Pennsylvania. Master of Science in Leadership and Business Ethics Program
Research Fellow, University of Pittsburgh (2002 - 2004), Pittsburgh, Pennsylvania. David Berg Center for Ethics and Leadership

Other Employment

Lecturer, College of Business Administration, University of Pittsburgh (2001 - 2004), Pittsburgh, Pennsylvania. Bachelor of Science in Business Administration Program
Recitation Instructor, College of Business Administration, University of Pittsburgh (1998 - 2004), Pittsburgh, Pennsylvania.
Lecturer, Katz Graduate School of Business, University of Pittsburgh (2002), Pittsburgh, Pennsylvania. MBA Program
Graduate Research Assistant, University of Pittsburgh (1997 - 2001), Pittsburgh, Pennsylvania. Katz Graduate School of Business

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles-in-Progress (All)	1	1		2
Publications in Conference Proceedings (Refereed)	1	1		2
Paper Presentations (Refereed)	2			2
Totals	4	2		6

Refereed Scholarly Publications

Articles in Refereed Journals

Hayibor, S. (2017). Is fair treatment enough? Augmenting the Fairness-Based Perspective on Stakeholder Behaviour. *Journal of Business Ethics*, 140 (1), 43-64. [A,FT50]
online only in 2015
Hayibor, S., & Collins, C. (2016). Motivators of Mobilization: Influences of Inequity, Expectancy, and Resource Dependence on Stakeholder Propensity to Take Action Against the Firm. *Journal of Business Ethics*, 139 (2), 351-374. [A,FT50]

Hayibor, S. (2012). Equity and Expectancy Considerations in Stakeholder Action. *Business and Society*, 51 (2), 220-262. [A]

Hayibor, S., Agle, B., Sears, G. J., Sonnenfeld, J. A., & Ward, A. (2011). Value congruence and charismatic leadership in CEO – top manager relationships: An empirical investigation. *Journal of Business Ethics*, 102 (2), 237-254. [A,FT50]

Articles in Refereed Conference Proceedings

Full Paper

Mauger, Y., Wasieleski, D. M., & Hayibor, S. (2019). Exploring personal values and job attribute salience among job seekers. *Annual Meeting of the International Association for Business and Society*.

San Diego, USA

Hayibor, S. (2019). Equity Sensitivity and Stakeholder Behaviour. *Annual Meeting of the International Association for Business and Society*.

San Diego, USA

Hayibor, S., & Wasieleski, D. M. (2011). Preferences Concerning Moral Development of Coworkers. *Annual Meeting of the International Association for Business and Society (IABS)*.

Bath, United Kingdom.

Chapters in Edited Books

Hayibor, S. (2017). Stakeholder Action: Predictors of Punitive and Prosocial Stakeholder Behaviour. In David M. Wasieleski, James Weber (Ed.), *Business & Society 360: Stakeholder Management* (pp. 215 - 247). Emerald Publishing. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Scholarly Publications

2013: Hayibor, S., *Review of 'Just Business: Arguments in Business Ethics', by M. E. Sandbu*. *Journal of Business Ethics Education*, 10: 379-388

2011: Hayibor, S., *Review of 'Business Ethics as Rational Choice', by John Hooker*. *Journal of Business Ethics Education*, 8(1): 423-430.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Associate Editor

2017: Academy of Management (AOM) (International). Social Issues in Management Division

2010: Academy of Management (AOM) (International). Social Issues in Management Division

Editor: Pedagogical PRJ

2010 – 2015: *Journal of Business Ethics Education* (International). Book Review Editor

Presentations

Papers Presented at Conferences

Refereed

Hayibor, S. (2019). *Equity Sensitivity in the Firm-Stakeholder Relationship*. Annual Meeting of the International Association for Business and Society, San Diego, California.

Mauger, Y., Wasieleski, D. M., & Hayibor, S. (2019). *Exploring Personal Values and Job Attribute Salience among Job Seekers*. Annual Meeting of the International Association for Business and Society, San Diego, California.

Hayibor, S. & Wasieleski, D. M. (2018). *The Dark Triad and Psychopathy: Values and Ethical Perspectives*. Biennial Conference of the International Society for the Study of Work and Organizational Values, Trieste, Italy.

Hayibor, S. & Wasieleski, D. (2015). *Scope and Duration Neglect in Assessments of Anticipated Utility*. Annual Meeting of the European Association for Work and Organizational Psychology, Oslo, Norway.

Hayibor, S. & Wasieleski, D. M. (2013). *Values Communication in Charismatic Relationships*. European Congress of Work and Organizational Psychology (EAWOP), Munster, Germany.

Wasieleski, D. M., Lundberg, G., & Hayibor, S. (2013). *Motivating Moral Action in Organizations: The Effects of Omission Bias and the Affect Heuristic on Perceptions of Moral Intensity*. European Congress of Work and Organizational Psychology (EAWOP), Munster, Germany.

Hayibor, S. & Wasieleski, D. M. (2011). *Determinants of Preferences Concerning the Cognitive Moral Development of Superiors and Subordinates*. European Congress of Work and Organizational Psychology (EAWOP), Maastricht, Netherlands.

Hayibor, S. & Wasieleski, D. M. (2011). *Preferences Concerning Moral Development of Coworkers*. Annual Meeting of the International Association for Business and Society (IABS), Bath, United Kingdom.

Hayibor, S., Sears, G., & Wasieleski, D. M. (2010). *Value Congruence as a Determinant of Charisma in CEOs' Relationships with their Top Managers*. International Society for the Study of Organizational and Work Values (ISSWOV), Estoril, Portugal.

Contract or Other Research

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Member: Committee/Task Force

2010 – 2012: Academy of Management (AOM). Membership Committee, Social Issues in Management Division, Academy of Management

Other Professional Service Activities

2015: Social Sciences and Humanities Research Council (SSHRC). " External Referee

Reviewer - External Tenure

2017: Sobey School of Business Saint Mary's University, Halifax, Canada-Nova Scotia.

2014: Odette School of Business, University of Windsor, Windsor, Canada-Ontario.

Reviewer: Ad Hoc Reviewer for a Journal

2016: Canadian Journal of Administrative Sciences.

2012 – 2016: Business and Society.

2010 – 2016: Journal of Business Ethics.

2014: Human Relations.

Reviewer: Conference Paper

2010 – 2012: Academy of Management Meeting.

- SIM Division, 2002, 2004-2005, 2008-2010, 2010
- OB Division, 2005-2012.
- MOC Division, 2010.

2011: Atlantic Schools of Business.

2010: International Association for Business and Society.

Scholarly Work in Progress**Working Papers**

Hayibor, S. (2019). "Equity Sensitivity and Stakeholder Behaviour," targeted for Business and Society.

Mauger, Y., Wasieleski, D. M., & Hayibor, S. (2019). "Exploring personal values and job attribute salience among job seekers," targeted for Business and Society.

Hayibor, S. (2017). "Scope and duration neglect in ethical reasoning," targeted for Journal of Business Ethics Education.

Description: Manuscript being prepared for submission

Hayibor, S. & Wasieleski, D. (2017). "Cluelessness about Cluelessness about Ethics: Metacognitive Deficiencies and Perceptions of Ethical Competence," targeted for Journal of Business Ethics.

Description: Manuscript being prepared for submission

Hayibor, S. & Collins-Dodd, C. (2017). "Equity, Expectancy, and Resource Dependence in Customer Retaliation Following Service Failure," targeted for Journal of Service Research.

Description: Manuscript being prepared for submission

Hayibor, S., Wasieleski, D., & Suezerglu, S. (2017). "Preferences Concerning Cognitive Moral Development of Superiors and Subordinates," targeted for Turkish Journal of Business Ethics.

Description: Manuscript being prepared for submission

Hayibor, S. (2017). "Stakeholder Identification and Corporate Social Performance: An Upper Echelons Perspective," targeted for Journal of Behavioral and Applied Management.

Description: Manuscript being prepared for submission

Hayibor, S., Wasieleski, D., & Escobar, Z. (2017). "Reconceptualizing 'Fit' in Stakeholder Networks," targeted for Journal of Business Ethics.

Description: Manuscript being prepared for submission

Hayibor, S. & Nordstrom, A. (2017). "Values Communication in Charismatic Relationships," targeted for Leadership Quarterly.

Description: Manuscript being prepared for submission

Hayibor, S. (2017). "Equity Sensitivity and Stakeholder Behaviour," targeted for Business and Society.

Description: Manuscript being prepared for submission

F. ACADEMIC RESPONSIBILITIES (TEACHING)**Teaching Schedule**

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4601	Business Ethics	0.5	49	Main	100%

2024/Winter	BUSI4601	Business Ethics	0.5	51	Main	100%
2024/Winter	BUSI4601	Business Ethics	0.5	49	Main	100%
2023/Winter	BUSI5802	Business Ethics	0.25	38	Shanghai	100%
2023/Winter	BUSI4601	Business Ethics	0.5	48	Main	100%
2023/Winter	BUSI4601	Business Ethics	0.5	50	Main	100%
2023/Winter	BUSI4601	Business Ethics	0.5	47	Main	100%
2022/Fall	BUSI6910	Foundations of Management Theory and Research	0.46	13	Main	100%
2022/Fall	BUSI6910	Foundations of Management Theory and Research	0.42	5	Main	100%
2022/Fall	BUSI5980	Foundations of Management Theory	0.04	1	Main	100%
2022/Fall	BUSI5980	Foundations of Management Theory	0.08	1	Main	100%
2021/Fall	BUSI5980	Foundations of Management Theory	0.36	5	Main	72%
2021/Fall	BUSI5980	Foundations of Management Theory	0.06	1	Main	12%
2021/Fall	BUSI6910	Foundations of Management Theory and Research	0.44	8	Main	88%
2021/Fall	BUSI6910	Foundations of Management Theory and Research	0.14	2	Main	28%
2021/Fall	BUSI5802	Business Ethics	0.25	35	Shanghai	100%
2021/Summer	BUSI6109	Special Topics in Management	0.5	5	Main	100%
2021/Summer	BUSI5802	Business Ethics	0.25	29	Shanghai	100%
2020/Fall	BUSI5980	Foundations of Management Theory	0.5	12	Main	100%
2020/Fall	BUSI5802	Business Ethics	0.25	38	Main	100%
2020/Fall	BUSI5802	Business Ethics	0.25	28	Main	100%
2020/Fall	BUSI4601	Business Ethics	0.5	48	Main	100%
2020/Fall	BUSI4601	Business Ethics	0.5	49	Main	100%
2020/Fall	BUSI4601	Business Ethics	0.5	45	Main	100%
2020/Winter	BUSI5980	Foundations of Management Theory	0.15	4	Main	31%
2020/Winter	BUSI5980	Foundations of Management Theory	0.35	9	Main	69%
2019/Fall	BUSI4601	Business Ethics	0.5	49	Main	100%
2019/Fall	BUSI4601	Business Ethics	0.5	47	Main	100%
2019/Fall	BUSI5802	Business Ethics	0.25	30	Main	100%
2019/Fall	BUSI5802	Business Ethics	0.25	13	Main	100%
2019/Fall	BUSI4601	Business Ethics	0.5	47	Main	100%
2019/Summer	BUSI5802	Business Ethics	0.25	43	Shanghai	100%
2018/Fall	BUSI5802	Business Ethics	0.25	12	Main	100%
2018/Fall	BUSI4601	Business Ethics	0.5	48	Main	100%
2018/Fall	BUSI4601	Business Ethics	0.5	45	Main	100%
2018/Fall	BUSI4601	Business Ethics	0.5	47	Main	100%
2018/Summer	BUSI5802	Business Ethics	0.25	30	Shanghai	100%
2018/Summer	BUSI5802	Business Ethics	0.25	19	Shanghai	100%

2017/Fall	BUSI5802	Business Ethics	0.25	27	Main	100%
2017/Fall	BUSI4601	Business Ethics	0.5	50	Main	100%
2017/Fall	BUSI5802	Business Ethics	0.25	19	Main	100%
2017/Fall	BUSI4601	Business Ethics	0.5	50	Main	100%
2017/Winter	BUSI4601	Business Ethics	0.5	46	Main	100%
2017/Winter	BUSI4601	Business Ethics	0.5	50	Main	100%
2017/Winter	BUSI4601	Business Ethics	0.5	46	Main	100%
2016/Fall	BUSI5802	Business Ethics	0.25	15	Main	100%
2016/Fall	BUSI5802	Business Ethics	0.25	32	Main	100%
2016/Winter	BUSI4601	Business Ethics	0.5	48	Main	100%
2016/Winter	BUSI4601	Business Ethics	0.5	43	Main	100%
2015/Fall	BUSI4601	Business Ethics	0.5	58	Main	100%
2015/Fall	BUSI5802	Business Ethics	0.25	25	Main	100%
2015/Fall	BUSI5802	Business Ethics	0.25	16	Main	100%
2015/Fall	BUSI4601	Business Ethics	0.5	63	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Professional Memberships

Academy of Management, N/A

European Association of Work and Organizational Psychology, N/A

International Association for Business and Society, N/A

International Society for the Study of Work and Organizational Values, N/A

Curriculum Vitae - Sprott School of Business

Robert Helal, PhD
Associate Professor, Teaching Stream - Preliminary - Tenure Track
Sprott School of Business (Marketing)
Telephone:
Email: robert.helal@carleton.ca
AACSB Qualification: Practice Academic (PA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Carleton University.
Master of Business Administration. University of Ottawa.
Bachelor of Science. McGill University.

B. EMPLOYMENT

Other Employment

Program Director, Analytics Solutions and Cloud Portfolio Management, IBM Analytics Division, IBM (2012 - Present), Ottawa, Canada-Ontario.
With a mission to identify and incubate new solution portfolio innovations, current mandate within product management focuses on solution ecosystem strategy and development, leading assessments of analytic offering candidate viability and championing early stage solution innovations from concept to version 1.0. This includes IBM integrated analytic solutions for line of business (LoB) and cloud-based SaaS package analytics initiatives, targeting major and emerging markets, and the leading of multi-functional high performance senior expert teams (external channels, cross-division).

Solutions Portfolio Strategy, Office of Strategy, Business Analytics Division, IBM (2010 - 2012), Ottawa, Canada-Ontario.
Responsible for the IBM Business Analytic division's solutions strategy, representing the division and working across the company's executive management teams on strategic global initiatives aimed at driving organic expansion opportunities, growth plays, and interlock synergies for the business.

Worldwide Program Director, Partner Solutions, Analytic Applications, IBM (2007 - 2010), Ottawa, Canada-Ontario.
Drove the vision and creation of a global Partner Ecosystem aimed at revenue growth and regional scalability through Partner adoption of the next generation IBM Cognos Analytic Applications and Adaptive Application Framework (AAF). As champion for this program, played a central role in the program planning and design, field alignment, partner recruitment, and enablement, which resulted in a proven repeatable partner growth model.

Director, Product and Portfolio Management, Analytic Applications, Cognos Incorporated (2005 - 2007), Ottawa, Canada-Ontario.
As part of Cognos' applied packaged analytics business, led the strategy and market requirements for the Analytic Applications Portfolio Management function, and the Analytic Application product lines: Performance Apps 2.0, and the next generation Analytic Applications. Responsible for all product planning, roadmap and market requirements, and supported Leadership in business development.

Director of Product, Performance Applications, Cognos Incorporated (2004 - 2005), Ottawa, Canada-Ontario.
As Director of Product, was responsible for all aspects of the Cognos Performance Applications product line, including product management, architecture and development functions. Managing this multifunctional team of over 20 people, the focus was on the delivery of the next generation of guided analytics, Application platform unification, and the rollout of all Applications on the major Cognos 7 Business Intelligence platform release.

Director, Analytic Architecture, Cognos Incorporated (2002 - 2003), Ottawa, Canada-Ontario.
Leading a cross-functional Products team, was responsible for the development of the Performance Applications Analytic Architecture, as part of Cognos' strategic agenda for leadership in the emerging Performance Management space. The mandate was focused on establishing a business role-based analysis framework to support the maturing market demand for information-based decision-making methodologies. This would become the foundation for the next generation Cognos Performance Analytic Solutions, including scorecarding and planning.

Senior Product Manager, Cognos Incorporated (2000 - 2001), Ottawa, Canada-Ontario.
In support of Cognos' goal to expand the Applications' addressable market, was promoted to lead the Applied Analytics strategy, supporting multiple development streams for the Financial, Customer and Supply Chain Analytics. Responsible for product roadmap, planning and content strategy, led a team of product managers and Application modelers in an aggressive growth period, aimed at expanding the portfolio of business-driven Analytic Applications by new five content products, across three platforms (SAP, Oracle, JDEdwards).

Product Manager, Cognos Incorporated (1999), Ottawa, Canada-Ontario.
As part of the founding team of the Applied Analytics Cognos Products business, led the Product Management function for the first packaged Analytic Applications developed by Cognos. As the "Voice of the Customer" in an emerging market, was responsible for all aspects of the Product planning, requirements and leadership with delivery teams in this highly entrepreneurial organization. This included Product evangelism, innovation, field support, and education of corporate stakeholders, channels and lead customers in establishing the prerequisite early business wins.

Senior Management Consultant (SAP Competency Center), Fujitsu Canada (formerly DMR Incorporated) (1998 - 1999), Ottawa, Canada-Ontario.

As a certified senior SAP R/3 functional consultant, specializing in the delivery of SAP R/3 Sales and Distribution applications, was responsible for successful project-based deliverables spanning all phases of major ERP system delivery to large enterprise clients in both public and private sector.

Working within cross-functional teams and as a prime client interface, project responsibilities included project functional module planning, requirements and design, system configuration and UAT, and end-user enablement.

C. PROFESSIONAL HONOURS

2016: 1st Place PhD Elevator Pitch Competition, Research in Management: National Capital Forum, Ottawa, Canada.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Refereed Scholarly Publications

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4800	Sprott Student Consulting II	0.5	2	Main	100%
2024/Winter	BUSI3800	Sprott Student Consulting I	0.5	5	Main	100%
2024/Winter	BUSI5997	Project Based Service Learning	0.5	12	Main	100%
2023/Fall	BUSI5997	Project Based Service Learning	0.5	10	Main	100%
2023/Fall	BUSI4800	Sprott Student Consulting II	0.5	2	Main	100%
2023/Fall	BUSI3800	Sprott Student Consulting I	0.5	8	Main	100%
2023/Fall	BUSI1800	Introduction to Business	0.5	176	Main	100%
2023/Fall	BUSI1800	Introduction to Business	0.5	212	Main	100%
2023/Summer	BUSI5997	Project Based Service Learning	0.5	5	Main	100%
2023/Summer	BUSI3800	Sprott Student Consulting I	0.5	3	Main	100%
2023/Winter	MKTG5200	Marketing Strategy	0.5	36	Main	100%
2023/Winter	BUSI5906	Special Topics	0.25	2	Main	100%
2022/Summer	MKTG5211	Technology Marketing	0.25	21	Main	100%
2022/Summer	MKTG5200	Marketing Strategy	0.5	9	Main	100%
2022/Winter	MKTG5200	Marketing Strategy	0.5	23	Main	100%
2022/Winter	BUSI5906	Special Topics	0.25	13	Main	100%
2022/Winter	MKTG5200	Marketing Strategy	0.5	27	Main	100%
2021/Fall	MKTG5200	Marketing Strategy	0.5	13	Main	100%
2021/Winter	MKTG5200	Marketing Strategy	0.5	29	Main	100%
2020/Winter	MKTG5200	Marketing Strategy	0.5	31	Main	100%
2020/Winter	MKTG5200	Marketing Strategy	0.5	27	Main	100%
2019/Winter	STGY5900	Corporate & Business Strategy	0.5	13	Main	100%

2018/Fall	BUSI4205	International Marketing	0.5	44	Main	100%
2018/Winter	BUSI3208	Business-to-Business Marketing	0.13	16	Main	27%
2018/Winter	BUSI3208	Business-to-Business Marketing	0.37	44	Main	73%
2017/Winter	BUSI3208	Business-to-Business Marketing	0.5	60	Main	100%
2016/Winter	BUSI3208	Business-to-Business Marketing	0.5	44	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Curriculum Vitae - Sprott School of Business

Michael Hine, PhD
Associate Professor - Tenured, 2005
Sprott School of Business (Business Analytics)
Telephone: 613-520-2600 x2662
Email: mike.hine@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-0184-8172>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Arizona State University.

Title: *Doctor of Philosophy in Business Administration. Dissertation: "The Design, Development and Validation of a Knowledge-based Organizational Learning Support System"*

Master of Science. Arizona State University.

Title: *Thesis: "The Design, Development, and Validation of a Run-Time Distributed Artificial Intelligence Shell"*

Bachelor of Commerce. University of Alberta.

B. EMPLOYMENT

Academic Appointments

Inaugural Area Coordinator, Sprott School of Business, Carleton University (2022 - Present), Ottawa, Canada-Ontario. Inaugural Area Coordinator, Business Analytics

Area Coordinator, Information Systems, Sprott School of Business, Carleton University (2014 - Present), Ottawa, Canada-Ontario.

Associate Professor, Information Systems, Sprott School of Business, Carleton University (2005 - Present), Ottawa, Canada-Ontario.

Associate Dean, Undergraduate Studies, Sprott School of Business, Carleton University (July, 2010 - June, 2013), Ottawa, Canada-Ontario.

Visiting Scholar, Victoria University of Wellington (February, 2008 - June, 2008), Wellington, New Zealand.

Visiting Scholar, University of Victoria (September, 2007 - January, 2008), Victoria, Canada-British Columbia.

Area Coordinator, Information Systems, Sprott School of Business, Carleton University (2006 - 2007), Ottawa, Canada-Ontario.

Assistant Professor, Information Systems, Sprott School of Business, Carleton University (2003 - 2005), Ottawa, Canada-Ontario.

Assistant Professor, Information Systems, Asper School of Business, University of Manitoba (2002 - 2003), Winnipeg, Canada-Manitoba.

Assistant Professor, Information Systems, Virginia Commonwealth University (1994 - 1996), Richmond, Virginia.

Other Employment

Vice President, Monster Consulting Group Inc. (1996 - Present), N/A, Unknown. Responsible for securing revenue generating contracts; designing, implementing and maintaining a variety of Information Systems including data-driven Internet/Intranet applications

Director of Decision Support Technology, Employment Support Institute, Virginia Commonwealth University (1997 - 2002), Richmond, Virginia.

Responsibilities include leading technical side of a \$1.5 Million U.S. Decision Support System project to help people with disabilities make work transition decisions.

C. PROFESSIONAL HONOURS

2012: Best Paper Award, Annual Hawaii International Conference on System Sciences. "Exploring Contracts With Options in Loyalty Reward Programs Supply Chain"

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	2	4		6
Articles-in-Progress (All)	1	2		3
Publications in Conference Proceedings (Refereed)		4		4

Paper Presentations (Refereed)		1		1
Grants - Funded (both refereed and non-refereed)		2		2
Totals	3	13		16

Refereed Scholarly Publications

Articles in Refereed Journals

Deng, Q., Hine, M., Ji, S., & Wang, Y. (2023). What Makes Brand Social Media Posts Engaging? An Integrative Framework and Future Research Agenda. *Journal of Internet Commerce*, 22 (1), 1-39. [B]

Published online with DOI in 2021

Gulanowski, D., Nardon, L., & Hine, M. (2022). Online Discussion Forum And Pre-migration Information Seeking: An Affordance Perspective. *Journal of International Technology and Information Management*, 31 (2), 110-139. [C]

Deng, Q., Hine, M., Ji, S., & Wang, Y. (2021). Understanding consumer engagement with brand posts on social media: The effects of post linguistic styles. *Electronic Commerce Research and Applications*, 48, 101068. [B]

Khataei, A., Hine, M., & Arya, A. (2020). The Design, Development and Validation of a Persuasive Content Generator. *Journal of International Technology and Information Management*, 29 (3), 46-80. [C]

Jan 2021: Publication was entered this as a 2020 publication and should not be changed going forward. This was be used in workload calculations for the next five years (last year to count is in 2024) and the publication stipend for 2020 only (if applicable).

Citation: Khataei, A., Hine, M.J., and Arya, A. (2021). "The Design, Development and Validation of a Persuasive Content Generator". *Journal of International Technology and Information Management*, Vol. 29, No. 3, pp. 46-80.

Hine, M., Nardon, L., & Gulanowski, D. (2019). The Role of Emotional Expression in Accessing Social Networks: The Case of Newcomers' Blogs. *Journal of International Technology and Information Management*, 28 (1), 2. [C]

Deng, Q., Hine, M., Sur, S., & Ji, S. (2019). Inside the Black Box of Dictionary Building for Text Analytics: A Design Science Approach. *Journal of International Technology and Information Management*, 27 (3), 7. [C]

Updated on Jan 16, 2020 Forthcoming

Rojas-Méndez, J., & Hine, M. (2018). Brand Personalities of Global Wine Exporters: A Collective Reputation Theory Perspective. *Journal of International Food & Agribusiness Marketing*, 30 (1), 88-105. [B]

Published online: 07 Nov 2017

Riordan, R., Hine, M., & Smith, T. (2017). An Integrated Learning Approach to Teaching an Undergraduate Information Systems Course. *Journal of Information Systems Education*, 23 (3), 59-70. [B]

Rojas-Méndez, J., & Hine, M. (2017). Countries' positioning personality traits: Analysis of 10 South American national tourism websites. *Journal of Vacation Marketing*, 23 (3), 233-247. [A]

Weber, M., & Hine, M. (2015). Who Inhabits a Business Ecosystem? The Technospecies as a Unifying Concept. *Technology Innovation Management Review*, 5 (5), 31-44. [C]

Hine, M. (2015). The Effects of Text Complexity on Online Review Helpfulness. *Communications of the International Information Management Association*, 14 (1), 45-61.

Murphy, S. A., Hine, M., & Kiffin-Petersen, S. (2014). The Role of Motivations and Emotions in Virtual Work. *Communications of the International Information Management Association*, 14 (3), 57-80.

Cater-Steel, A., Hine, M., & Grant, G. (2010). Embedding IT Service Management in the Academic Curriculum: A Cross-national Comparison. *Journal of Global Information Technology Management*, 13 (4), 64-92. [B]

special issue in [Global Issues in IT Servitization and IT Service Management](#)

Hine, M., Murphy, S. A., & Ambwani, A. (2010). Emotional Contagion in Computer Mediated Communication. *International Journal of Knowledge, Culture and Change Management*, 10 (6), 149-163. [C]

Articles in Refereed Conference Proceedings

Full Paper

Deng, Q., Hine, M., & Ji, S. (2022). Symposium: Improving Text Analytics Using Content Dictionaries. *Society for Industrial and Organizational Psychology (SIOP) Annual Conference*.

Deng, Q., Hine, M., Ji, S., & Wang, Y. (2020). Investigating the Impacts of Brand Social Media Posts' Linguistic Styles on Consumer Engagement. *Hawaii International Conference on System Sciences*, 2741 – 2750.

Maui, Hawaii, USA

Deng, Q., Hine, M., Ji, S., & Wang, Y. (2020). Consumer Engagement with Brand Posts on Social Media: Current State and Research Agenda. *Hawaii International Conference on System Sciences*, 4089-4098.

Maui, Hawaii, USA

Rojas-Mendez, J., Hine, M., & Rod, M. (2019). Country wine brand personality (CWBP): The case of French wine in Canada. *Brand Symposium*.

Brand Symposium, May 13-14, Shanghai, China.

Arya, A., Hine, M., & Khataei, A. (2018). User Trust Graph: A Model to Measure Trustworthiness. *Personalization in Persuasive Technology Workshop*, 93-101.

Waterloo, Canada, May

Rojas-Méndez, J., Hine, M., & Rod, M. (2017). Brand Personalities of Global Wine Exporters: A Collective Reputation Theory Perspective. *International Food Marketing Research Symposium*.

Proceedings of the International Food Marketing Research Symposium, Dubrovnic, Croatia, June 15-17

Deng, Q., Hine, M., Sur, S., & Ji, S. (2017). Building an Environmental Sustainability Dictionary for the IT Industry. *Hawaii International Conference on System Sciences (HICSS)*.

Rojas-Mendez, J., Rod, M., & Hine, M. (2016). What's Your Oenotype?: Global Wine Consumers' Perceptions of Country-wine Personalities. *Global Brand Conference*.

Bradford, England - April 27-29.

Rojas-Méndez, J., & Hine, M. J. (2014). South American countries' positioning on personality traits: Analysis of 10 national tourism websites. *Global Marketing Conference*.

July 15-18, 2014. Singapore.

Cao, Y., Nsakanda, A. L., Diaby, M., Ji, S., & Hine, M. J. (2012). Exploring Contracts With Options in Loyalty Reward Programs Supply Chain. *Hawaii International Conference on System Sciences (HICSS)*, 1257-1266.

January 4-7, 2012. Maui, Hawaii, USA. Nominated for best paper.

Ramirez, A., Ji, S., Riordan, R., Ulbrich, F., & Hine, M. (2010). Empowering Business Students: Using Web 2.0 Tools in the Classroom. *International Conference on Computer Supported Education*.

April 7-10, 2010. Valencia, Spain.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Associate Editor

2018: Information Systems Journal (International). Special issue on Storytelling in Information Systems

Presentations

Papers Presented at Conferences

Refereed

Rojas-Mendez, J., Hine, M., & Rod, M. (2023). *How French Wine Personality Influences Canadian Consumers' Purchase Decisions*. Academy of International Business Conference, Warsaw, Poland.

Rojas-Méndez, J., Hine, M., & Rod, M. (2017). *Brand Personalities of Global Wine Exporters: A Collective Reputation Theory Perspective*. International Food Marketing Research Symposium, Dubrovnik, Croatia.

Description: June 15-16

Gulanowski, D., Zhang, H., Nardon, L., & Szkudlarek, B. (2017). *Supporting newcomers: a critical review*. Academy of International Business (AIB) US Northeast Conference, Philadelphia, Pennsylvania.

Description: October, 2017.

Hine, M. & Nardon, L. (2017, June). *Emotional Expression in Newcomer's Blogs: A text analytics approach*. International Academy of Intercultural Research, Staten Island, New York.

Description: 10th Biennial Conference

Rojas-Méndez, J., Rod, M., & Hine, M. (2016). *What's Your Oenotype?: Global Wine Consumers' Perceptions of Country-wine Personalities*. Global Brand Conference, Bradford, United Kingdom.

Rojas-Méndez, J. & Hine, M. (2014). *South American countries' positioning on personality traits: Analysis of 10 national tourism websites*. Global Marketing Conference, Singapore, Singapore.

Cao, Y., Nsakanda, A., Diaby, M., Ji, S., & Hine, M. J. (2012). *Exploring Contracts with Options in Loyalty Reward Programs Supply Chain*. Hawaii International Conference on System Sciences (HICSS), Maui, Hawaii.

Description: January 4-7

Other Presentations

Invited Lecture

2022: May Research Day, Halifax, Canada-Nova Scotia. "Do Emojis Clutter Messages or Add Value? The Effects on Brand Perceptions", May Research Day, Faculty of Management, Dalhousie University, Halifax, NS, Canada, May 2022.

Contract or Other Research

Research Grants and Awards

Grants

2021: Hine, M. & Nardon, L., CU COVID-19 Rapid Research Response Grants (\$6,115.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Hine, M. & Nardon, L., CU COVID-19 Rapid Research Response Grants (\$6,115.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2017: Nardon, L. & Hine, M., Targeted Research, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board Member: PRJ Editorial Review Board

2022 – 2023: Journal of Information Systems Education.

Chair: Committee / Task Force

2017 – 2023: Text Mining in Big Data Analytics, Hawaii International Conference on Systems Science..

Chair: Conference / Track / Program

2023: Workshop on Text Analytics, Hawaii International Conference on Systems Science.

2017 – 2021: Hawaii International Conference on System Sciences (HICSS). Mini-Track Co-Chair. 2017. Text Mining in Big Data Analytics, Hawaii International Conference on Systems Science.

2010 – 2018: Hawaii International Conference on System Sciences (HICSS). Mini-Track Co-Chair. 2010-2018. Global Virtual Teams, Hawaii International Conference on Systems Science.

Invited Lecture

2022: May Research Day, Halifax, Canada-Nova Scotia. "Do Emojis Clutter Messages or Add Value? The Effects on Brand Perceptions", May Research Day, Faculty of Management, Dalhousie University, Halifax, NS, Canada, May 2022.

Other Professional Service Activities

2018 – 2023: Hawaii International Conference on System Sciences (HICSS). Co-Organizer: Workshop on Text Analytics for Global Virtual Teams, Hawaii International Conference on Systems Science.

2015: Hawaii International Conference on System Sciences (HICSS). Co-Organizer: Workshop on Text Analytics for Global Virtual Teams, Hawaii International Conference on Systems Science.

2013 – 2015: Hawaii International Conference on System Sciences (HICSS). Co-Organizer. Workshop on Cultural Communication and Accessible CyberLearning

Reviewer: Ad Hoc Reviewer for a Journal

2022 – 2023: Pacific Asia Conference on Information Systems (PACIS).

2022 – 2023: Decision Support Systems.

2022: Pacific Asia Conference on Information Systems.

2022: Decision Support Systems.

2022: Journal of Information Systems Education.

2015 – 2016: Journal: Information & Management.

Scholarly Work in Progress

Papers Under Review

Deng, Q., Hine, M., Ji, S., & Wang, Y. (2020). "Consumer Engagement with Brand Posts on Social Media: Current State and Research Agenda," Revised and resubmitted to *Journal of Research in Interactive Marketing*.

Hine, M., Gulanowski, D., & Nardon, L. (2018). "Emotional expression and access to social networks: a text analysis of newcomers' blogs.," Initial submission to *Journal of Global Mobility: The Home of Expatriate Management Research*.

Hine, M. & Arya, A. (2018). "User Trust Graph: A model to detect trust strength," Initial submission to *International Conference on Persuasive Technology*.

Working Papers

Hine, M. (2024). "Examining the Impact of COVID-19 on Canadian University Reddit Communities: A Text Mining and Visualization Approach."

Hine, M., Philips, K., Bhattacharya, O., Driver, A., & marks, A. (2024). "Message vs messenger: How linguistic and communicator attributes influence viewer motivation to act against climate change."

Hine, M., Rojas-Mendez, J., & Rod, M. (2023). "Pour Decisions: Unveiling the Allure of French Wine - A Tale of Personality, Occasions, and Gender," targeted for Journal of International Food & Agribusiness Marketing.

Deng, Q., Ji, S., Wang, Y., & Hine, M. (2020). "Investigating the Impacts of Brand Social Media Posts' Linguistic Styles on Consumer Engagement." Description: Electronic Commerce Research and Applications

Hine, M. & Nardon, L. (2018). "Emotional Expression in Newcomers' Blogs: A Text Analytics Perspective." Description: In preparation for journal submission.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	ITIS5434	Data Visualization	0.25	22	Main	100%
2024/Winter	BUSI3434	Data Visualization	0.5	10	Main	100%
2024/Winter	BUSI2401	Intro Data Analytics	0.5	69	Main	100%
2024/Winter	BUSI2401	Intro Data Analytics	0.5	71	Main	100%
2024/Winter	ITIS5434	Data Visualization	0.25	40	Shanghai	100%
2023/Summer	ITIS5434	Data Visualization	0.25	13	Main	100%
2023/Summer	ITIS5434	Data Visualization	0.25	24	Shanghai	100%
2023/Winter	ITIS5434	Data Visualization	0.25	16	Main	100%
2023/Winter	BUSI2401	Intro Data Analytics	0.5	80	Main	100%
2022/Fall	BUSI2401	Intro Data Analytics	0.5	59	Main	100%
2022/Fall	ITIS5434	Data Visualization	0.25	17	Main	100%
2022/Winter	ITIS5434	Data Visualization	0.25	38	Shanghai	100%
2022/Winter	ITIS5434	Data Visualization	0.25	35	Main	100%
2021/Fall	ITIS5408	Social Analytics	0.5	30	Main	100%
2021/Fall	BUSI4408	Social Analytics	0.5	39	Main	100%
2021/Fall	BUSI3400	Data and Information Management	0.5	57	Main	100%
2021/Summer	ITIS5434	Data Visualization	0.25	23	Main	100%
2021/Summer	ITIS5434	Data Visualization	0.25	34	Shanghai	100%
2021/Winter	ITIS5434	Data Visualization	0.25	12	Main	100%
2020/Fall	BUSI3400	Data and Information Management	0.5	55	Main	100%
2020/Fall	ITIS5408	Social Analytics	0.5	40	Main	100%
2020/Fall	BUSI4408	Social Analytics	0.5	48	Main	100%
2020/Summer	ITIS5434	Data Visualization	0.25	19	Main	100%
2020/Summer	ITIS5434	Data Visualization	0.25	29	Shanghai	100%
2019/Fall	ITIS5434	Data Visualization	0.25	34	Main	100%
2019/Summer	ITIS5434	Data Visualization	0.25	42	Shanghai	100%
2019/Summer	BUSI5906	Special Topics	0.25	14	Main	100%
2018/Fall	ITIS5408	Social Analytics	0.5	16	Main	100%
2018/Fall	BUSI4408	Social Analytics	0.5	33	Main	100%
2018/Fall	BUSI3400	Data and Information Management	0.5	36	Main	100%
2018/Summer	BUSI5906	Special Topics	0.25	30	Shanghai	100%

2018/Summer	BUSI5906	Special Topics	0.25	19	Shanghai	100%
2018/Winter	BUSI4408	Social Analytics	0.5	25	Main	100%
2017/Fall	BUSI4408	Social Analytics	0.5	34	Main	100%
2017/Fall	BUSI2400	Foundations of Information Systems	0.39	66	Main	78%
2017/Fall	BUSI3400	Data and Information Management	0.5	59	Main	100%
2017/Fall	BUSI2400	Foundations of Information Systems	0.11	2	Main	22%
2016/Fall	BUSI3400	Data and Information Management	0.5	55	Main	100%
2016/Fall	BUSI2400	Foundations of Information Systems	0.5	74	Main	100%
2016/Winter	BUSI2400	Foundations of Information Systems	0.45	64	Main	90%
2016/Winter	BUSI2400	Foundations of Information Systems	0.1	16	Main	20%
2016/Winter	BUSI2400	Foundations of Information Systems	0.06	8	Main	11%
2016/Winter	BUSI2400	Foundations of Information Systems	0.05	7	Main	10%
2016/Winter	BUSI2400	Foundations of Information Systems	0.4	65	Main	80%
2016/Winter	BUSI2400	Foundations of Information Systems	0.44	64	Main	89%

Service to the institution (Academic)

Faculty Assignments

PhD. Comprehensive Committees:

2017-2018: Hugh Cairns

PhD. Thesis Committees:

2017-2018: Andre Lancot

University Assignments

Masters Thesis Committees:

2016-2017: Emily Walpole

University Assignments

Masters Thesis Committees:

2022-2023: Serdar Tuncer, Computer Science

PhD. Thesis Committees:

2022-2023: Hossain Samr Qorbani, Engineering

Innovation in Teaching Methods

Innovations in Course Content / Presentation

2017 - BUSI 4408 (Social Analytics): Designed and developed the first course in Social Analytics to be offered at the Sprott School of Business.

2015 - BUSI 3405: Designed and developed the first course in ITIL offered by the Sprott School of Business..

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2018-2019: Tenure and Promotion Committee - Departmental (Cluster II)

2018-2019: Nicol Building Faculty Office Space Allocation Committee

2016-2017 – 2017-2018: Workload Incentive Task Force

2014-2015: Plenary Committee

Sprott School of Business, Carleton University

University Assignments

Other Committees:

2021-2022: Carleton University Institute for Data Science Board

Credentials

Professional Memberships

Administrative Sciences Association of Canada, N/A

Association for Information Systems, N/A

Decision Sciences Institute, N/A

Institute for Operations Research and the Management Sciences, N/A

Curriculum Vitae - Sprott School of Business

Diane Isabelle, PhD
Associate Professor - Tenured, 2019
Sprott School of Business (International Business)
Telephone: 613-520-2600 x8581
Email: diane.isabelle@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcidID: <https://orcid.org/0000-0002-1833-1110>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Carleton University.
Title: *National Innovation Systems, Social Capital, and Country Image: A Multi-Country Study of International Scientific Collaborations*
Master of Business Administration. University of Manitoba.
Bachelor of Science. Université de Montréal École Polytechnique.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (July, 2019 - Present), Ottawa, Canada-Ontario. Director, International Business Study Group
Visiting Associate Professor, University of Johannesburg (2021 - 2024), Johannesburg, South Africa.
Visiting Professor, Aalto University (August, 2019 - September, 2019), Aalto, Finland.
Visiting Professor, University of Southern Denmark (August, 2019 - September, 2019), Odense, Denmark.
Assistant Professor, Sprott School of Business, Carleton University (2014 - June, 2019), Ottawa, Canada-Ontario. Global Entrepreneurship (2014-16), International Business (2016-present).
Instructor, Sprott School of Business, Carleton University (2011 - 2014), Ottawa, Canada-Ontario. Term faculty (Instructor) in Entrepreneurship, International Business, and Marketing at the B.Comm and MBA levels.

Other Employment

Industrial Engineer and Technology Advisor for IRAP, Manitoba Research Council (2015 - Present), Winnipeg, Canada-Manitoba. Advised manufacturing enterprises on issues such as, processes, methods, plant layouts, costing, inventory, production planning and control. Training and use of CAD/CAM tools.
Senior Project Engineer, Boeing of Canada Ltd. (2015 - Present), Winnipeg, Canada-Manitoba. In charge of projects to optimize plant layouts, equipment, production methods and information systems.
Project Engineer, Esso- Building Products Of Canada Ltd. (2015 - Present), Montreal, Canada-Quebec. Responsible for the study, design, approval and implementation of engineering projects for manufacturing plants across Canada. These projects required mechanical, civil and industrial engineering expertise.
Manufacturing Engineer, General Electric Of Canada Ltd. (2015 - Present), Montreal, Canada-Quebec. Hydraulic turbines and manufacturing systems.
Principal, Diane Isabelle & Associates Consultants (2011 - Present), Ottawa, Canada. Expert advice, research and analysis related to technology & innovation management for public and private sector organizations.
Sessional Lecturer, Sprott School of Business, Carleton University (2008 - 2011), Ottawa, Canada-Ontario. Marketing
A/Executive Director to the V.P. Physical Sciences, National Research Council Of Canada (NRC) (2008 - 2011), Ottawa, Canada-Ontario. Supporting the Vice-President Physical Sciences who oversaw a portfolio of eight research institutes located across Canada (approx. 700 staff, \$150M annual budget), working in fields ranging from metrology, nanotechnology, IT, molecular sciences, microstructural sciences, material sciences to astronomy and astrophysics. The portfolio is actively engaged in collaboration with universities and the private sector, in Canada and abroad, to co-develop and translate technological innovations into commercial products. Key contributions include the effective participation of the portfolio to the new strategic directions of NRC: foresight, market analyses, and evaluation of proposed business plans for new research programs. The Executive Director was also accountable for the effective and efficient management of a team of professionals providing various executive support services, including the management of the VP office budget (approx. \$1M). Work was generally of a critical and confidential nature, requiring considerable judgement.
Manager, International Programs, National Research Council Of Canada (NRC)- Industrial Research Assistance Program (IRAP) (2006 - 2008), Ottawa, Canada-Ontario. Reporting to the Director General (DG) of NRC-IRAP, responsible for the development and implementation of a national strategy for IRAP's international involvement to support Canadian small enterprises R&D and commercialization efforts. Key responsibilities included developing and overseeing formal arrangements with foreign organizations similarly mandated, managing key relationships in Canada and abroad, sharing knowledge of

innovation systems and best practices with foreign organizations, with a view to position IRAP within other Canadian and foreign key players. Other key activities included contributing and participating in international technology missions with Canadian firms, promoting joint collaborative research projects with foreign countries, directing research and development of strategies, programs, policies, knowledge systems and tools for IRAP's network of Industrial Technology Advisors working with Canadian firms.

Researcher, Innovation Management, National Research Council Of Canada (NRC) (2005 - 2006), Ottawa, Canada-Ontario. Reporting to the VP, Renewal, led a team of scientists and consultants to conduct a complex foresight exercise to 2020 in the areas of science & technology, innovation systems, major world societal and market trends driving the priorities of S&T, competencies and innovation system required in Canada.

S&T Commercialization Researcher, National Research Council Of Canada (NRC) (2004 - 2005), Ottawa, Canada-Ontario. Reporting to the DG of the NRC Commercialization Branch to conduct research into national and international commercialization models of publicly funded research and the development of strategic models for NRC. The work led to the permanent institution of a Central Business Services with a goal to support commercialization efforts of NRC institutes.

Strategic Project Manager, National Research Council Of Canada (NRC)- Industrial Research Assistance Program (IRAP) (2003 - 2004), Ottawa, Canada-Ontario. Reporting to the DG of IRAP, responsible for leading strategic projects of national interest to IRAP and NRC, taking into consideration the global environment.

Acting Director, National Initiatives, National Research Council Of Canada (NRC)- Industrial Research Assistance Program (IRAP) (2001 - 2003), Ottawa, Canada-Ontario. Reporting to the DG of IRAP, managed a group of senior engineers and scientists responsible to provide leadership in technology trends, assessments, committees and networking within NRC and with other government departments to assist Canadian SMEs.

Manager, NRC- IRAP Precommercialization Assistance Program (1999 - 2002), Ottawa, Canada-Ontario. Responsible for the design and implementation of a 30M\$/year initiative between NRC-IRAP and Technology Partnership Canada (TPC, Industry Canada) across Canada to support large research projects by industry. Several of these early projects involved NRC spin-offs that have since been extremely successful (e.g., SiGe, acquired by Skyworks for \$210M in 2011; IMRIS; Novadaq).

Strategic Planner, NRC Institute for National Measurement Standards (2000 - 2001), Ottawa, Canada-Ontario. On assignment from IRAP to lead a multi-disciplinary team responsible for the strategic plan framework and the development of a five-year strategic plan for the institute.

National Coordinator, NRC-HRDC Youth Initiatives (1997 - 2000), Ottawa, Canada-Ontario. Selected as the national coordinator of the initiative because of my extensive experience with SMEs. Design and implementation of the new NRC Youth initiatives at IRAP, representing 5M\$ and 500 internships of recent graduates in SMEs per year, as part of the Youth Employment Strategy of then Human Resources Department Canada (HRDC).

Senior Industrial Technology Advisor., National Research Council Of Canada (NRC)- Industrial Research Assistance Program (IRAP) (1994 - 1997), Montreal, Canada-Quebec. Managing a team of 12 seasoned Industrial Technology Advisors. Responsible for the approval of approx. 200 R&D projects with SMEs/year, with an annual contribution budget of \$3M.

Industrial Technology Advisor (ITA), National Research Council Of Canada (NRC)- Industrial Research Assistance Program (IRAP) (1984 - 1994), Ottawa, Canada-Ontario. Responsible for providing technical and financial assistance to SMEs for industrial research projects. Consistently generated high numbers of large, complex R&D projects. In charge of the Industrial Engineering (IE) assistance to Quebec SMEs, supervised Industrial Engineering students and graduates. Active participation in various national and international NRC activities (technology transfer missions).

C. PROFESSIONAL HONOURS

2023: Conference Best Paper Proceedings, Biennial Conference of the Africa Academy of Management. Isabelle D.A., Semanya, L., and Dhlwayo, S. (2023) Sustainable adoption of Fourth Industrial Revolution technologies by SMEs: The case of the South African ecosystem. 6th Biennial Conference of the Africa Academy of Management, January 8-10, 2023, Cairo, Egypt. Conference Best Paper Proceedings..

2020: Conference Best Paper Proceedings, Biennial Conference of the Africa Academy of Management. Isabelle D.A., Westerlund, M., and Sajuyigbe V. (2020). Legitimacy and distinctiveness of Nigerian-Canadian transnational firms. Proceedings of the Biennial Conference of the Africa Academy of Management, Lagos, Nigeria. January 8-11, 2020..

2014: Honourable Mention, Technology and Innovation Management Division, Annual Conference of Administrative Sciences Association of Canada (ASAC), Technology Management Division. For "Conceptual Exploration of Quality Function Deployment in a Science, Technology and Innovation Policy Context", Annual Conference of Administrative Sciences Association of Canada (ASAC), Technology Management Division, Muskoka, Ontario, May 10-13, 2014..

2013: Telfer-Sprott Research Fund, Telfer School of Business, University of Ottawa and Sprott School of Business, Carleton University. "Applying Quality Function Deployment to Science, Technology and Innovation Policy"

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	9	2	12
Articles-in-Progress (All)		10		10
Publications in Conference Proceedings (Refereed)		12	1	13

Paper Presentations (Refereed)		2	1	3
Research Report, Non-Refereed		1		1
Grants - Funded (both refereed and non-refereed)		5		5
Totals	1	39	4	44

Refereed Scholarly Publications

Articles in Refereed Journals

Isabelle, D., & Weserlund, M. (2023). A topic modelling based bibliometric exploration of international business research. *International Journal of Bibliometrics in Business and Management*. [C,Other]

Isabelle, D., Westerlund, M., & Sajuyigbe, V. (2022). Building legitimacy and distinctiveness on Nigerian-Canadian transnational firms' websites. *Africa Journal of Management*, 8 (4), 505-526. [B]

Isabelle, D., Han, Y., & Westerlund, M. (2022). A machine-learning analysis on the impacts of the COVID-19 pandemic on small business owners and implications from Canadian government policy response. *Canadian Public Policy*, 48 (2), 322-342. [B]

Isabelle, D., & Westerlund, M. (2022). A review and categorization of Artificial Intelligence-based opportunities in wildlife, ocean and land conservation. *Sustainability*, 14 (4). [C,Other]

Westerlund, M., Isabelle, D., & Leminen, S. (2021). The acceptance of digital surveillance in an age of Big Data. *Technology Innovation Management Review*, 11 (3), 33-45. [C]

Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). Entrepreneurial Motivation in University Business Students: A Latent Profile Analysis based on Self-Determination Theory. *Entrepreneurship Research Journal*. [B]

accepted for publication; November 25, 2020

Isabelle, D., Westerlund, M., Mane, M., & Leminen, S. (2020). The Role of Analytics in Data-Driven Business Models of Multi-Sided Platforms: An exploration in the food industry. *Technology Innovation Management Review*, 10 (7). [C]

Del Sarto, N., & Isabelle, D. (2020). The role of accelerators in firm survival: an fsQCA analysis of Italian startups. *Technovation*, 90-91. [A]
In press, advance online publication

Isabelle, D. (2020). Gamification of entrepreneurship education. *Decision Sciences Journal of Innovative Education*, 18 (2), 203-223. [C]
Journal was B in SPRJ 2019, journal became C in SPRJ 2020

Isabelle, D., & Del Sarto, N. (2020). How can accelerators in South America evolve to support start-ups in a post-COVID-19 world? *Multidisciplinary Business Review*, 13 (2), 66-79.

Isabelle, D., Horak, K., McKinnon, S., & Palumbo, C. (2020). Is Porter's Five Forces framework still relevant? A study of the mining industry versus the IT industry. *Technology Innovation Management Review*, 10 (6), 28-41. [C]

Isabelle, D., Westerlund, M., Rajala, M., & Leminen, S. (2019). Understanding the aspirations of Finnish entrepreneurs and venture capitalists: their effects on international operations and growth. *International Journal of Entrepreneurship and Small Business*, 37 (2), 190-213. [B]

Westerlund, M., Rajala, R., Leminen, S., & Isabelle, D. (2017). Do relationships facilitate growth in small technology firms? *International Journal of Technoentrepreneurship*, 3 (3), 228-243.

Isabelle, D., Westerlund, M., Rajala, R., & Leminen, S. (2017). Networks, Business Models and Competitiveness in Small Finnish Firms. *International Journal of Business and Globalisation*, 18 (1), 9-26.

Schillo, R.S., Isabelle, D., & Shakiba, A. (2017). Linking Advanced Biofuels Policies with Stakeholder Interests - A Framework and Methodology Building on Quality Function Deployment. *Energy Policy*, 100, 126-137. [A]

Westerlund, M., Isabelle, D., Rajala, R., & Leminen, S. (2016). Funders and founders: Partners in good times and in bad? *International Journal of Globalisation and Small Business*, 8 (3), 269-288. [C]

Aten, K., Nardon, L., & Isabelle, D. (2016). Making Sense of Foreign Context: Skilled Migrant's Perceptions of Contextual Barriers and Career Options. *International Journal of Cross Cultural Management*, 16 (2), 191-214. [B]

Isabelle, D., & Heslop, L. (2014). The Role of Social Capital in International Scientific Collaborations: Evidence from a Multi-Country Survey. *International Journal of Technology and Globalization*, 7 (4), 259-287. [C]

Isabelle, D. (2013). Key Factors Affecting a Technology Entrepreneur's Choice of Incubator or accelerator. *Technology Innovation Management Review*, 16-22. [C]

Isabelle, D., & Heslop, L. (2011). Managing for Success in International Scientific Collaborations: Views from Canadian Government Senior Science Managers. *Science and Public Policy*, 38 (5), 349-364. [B]

Isabelle, D. (2010). Technology Foresight at the National Research Council of Canada: Methodology and implementation. *Maintenance Problems*, 3, 35-43.

Articles in Refereed Conference Proceedings

Full Paper

- Isabelle, D., Semanya, L., & Dhlwayo, S. (2022). Sustainable adoption of Fourth Industrial Revolution technologies by SMEs: The case of the South African ecosystem. *Conference of the Africa Academy of Management*.
- Isabelle, D., Del Sarto, N., & Di Minin, A. (2022). Corporate accelerators as technology intermediaries for growth. *R&D Management Conference*.
- Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). Entrepreneurial motivations in university students. *International Congress of Psychology*.
- Westelund, M., Isabelle, D., & Leminen, S. (2020). Citizen acceptance of mass surveillance? Identity, intelligence and biodata concerns. *ISPIM Connects Global*.
Osaka, Japan (Virtual). Dec. 7-8, 2020
- Isabelle, D., Westerlund, M., & Leminen, S. (2020). A machine-learning video analysis of videos on entrepreneurial fear of failure. *ISPIM Connects Global*.
- Isabelle, D., Westerlund, M., & Sajuyigbe, V. (2020). Legitimacy and distinctiveness of Nigerian-Canadian transnational firms. *Biennial Conference of the Africa Academy of Management*.
Best Paper Award Winner, Entrepreneurship & Small Business
- Westerlund, M., Rajala, R., Isabelle, D., Leminen, S., Basbair, R., Korhonen (2019). A multifactor model for digital innovation in allergy-free food retailing. *ISPIM Connects*.
ISPIM Connects Ottawa 2019 Conference, Ottawa, Canada, April 7-10. (BEST PAPER NOMINATION/Dick Marsh Award)
- Isabelle, D., & Westerlund, M. (2019). A Topic Modelling Analysis of Research in International Business Conferences. *Vaasa Conference on International Business*.
Vaasa, Finland, August 19-21
- Lu, I., Heslop, L. A., Brouard, F., Kwan, E., & Isabelle, D. A. (2019). Understanding the Heterogeneity of Youth's Entrepreneurial Motivations. *Global Research Symposium on Marketing and Entrepreneurship*.
London, UK. June 27-29, 2019
- Lu, I., Heslop, L. A., Brouard, F., Kwan, E., & Isabelle, D. A. (2019). Exploring the Profiles of Youth Entrepreneurial Motivation. *Academy of Marketing Conference*.
London, UK. July 2-4, 2019.
- Taherizadeh, A., & Isabelle, D. (2019). Do theories of strategic alliances explain open-source technological collaborations? *ISPIM Connects*.
Ottawa, Canada, April 7-10, 2019.
- Fraser, L., & Isabelle, D. (2019). Impact of quality management practices on innovation performance: The case of Paradigm Electronics Inc./MartinLogan Ltd./Anthem. *ISPIM Connects*.
Ottawa, Canada, April 7-10, 2019
- Westerlund, M., Isabelle, D., & Ebonka, E. (2019). Identifying user priorities for service innovation in the public sector. *ISPIM Connects*.
ISPIM Connects Ottawa 2019 Conference, Ottawa, Canada, April 7-10
- Isabelle, D., & Westerlund, M. (2018). Data-driven business models in the food business. *International Society for Professional Innovation and Management (ISPIM) Connects*.
Fukuoka, Japan, December 2-5, 2018
- Maheshwari, B., & Isabelle, D. (2017). Resilience through academic Collaborative Innovation Networks: the case of Canada Research Chairs. *International Conference on Collaborative Innovation Networks*.
Detroit, Michigan, Sept. 14-17
- Isabelle, D., Westerlund, M., Leminen, S., & Rajala, R. (2017). Public venture capital and entrepreneurial cognizance: Effects on the performance of small international companies. *Academy of International Business (AIB) Annual Meeting*.
July 2-5 - Dubai, UAE
- Isabelle, D., & Westerlund, M. (2016). Business Incubation and Business Model Innovation. *International Conference on Innovation and Entrepreneurship*.
4th International Conference in Toronto, Canada, April 28-29
- Westerlund, M., Rajala, R., Leminen, S., & Isabelle, D. (2015). Networked Business Models for Small Firm's International Expansion. *International Conference on Globalization and Changing Landscape of Business*.
June 30 - July 1, 2015. Bangalore, India.
- Schillo, R. S., & Isabelle, D. (2014). Conceptual Exploration of Quality Function Deployment in a Science, Technology and Innovation Policy Context. *Administrative Sciences Association of Canada (ASAC)*.
Muskoka, Ontario. May 10-13, 2014.
Honourable Mention, Technology and Innovation Management Division.
- Isabelle, D., & Nardon, L. (2013). Bridging Cultural Distances: A Cognitive Perspective on Migrant Workers. *European Group for Organizational Studies (EGOS) Colloquium*.
Colloquium: Bridging Continents, Cultures and Worldviews. Montréal, Québec. July 4-6, 2013.
- Isabelle, D., & Heslop, L. A. (2012). Triple Helix Collaborations: Success Factors and Capitalization of Knowledge in International Scientific

Collaborations. *International Schumpeter Society (ISS) Conference*.
Brisbane, Australia. July 2-5, 2012.

Chapters in Edited Books

Isabelle, D. (2014). Incubación y Aceleración de Empresas Alrededor Del Mundo: Una Revisión de la Investigaciones, y Reflexiones para Colombia (Business Incubation and Acceleration around the World: A Review of Research and Insights for Colombia). In Edgar Vieira Posada (Ed.), *EL TLC Colombia Canadá. Nuevo escenario para el comercio y la inversión* (pp. 155-195). Bogota, B.C.: Editorial CESA. [Status: Published]

Isabelle, D. (2013). Capitalization of Science & Technology Knowledge: Practices, Trends and Impacts on Techno-Entrepreneurship. In François Thérin (Ed.), *Handbook of Research on Techno- Entrepreneurship, Second Edition: How Technology and Entrepreneurship are Shaping the Development of Industries and Companies* (pp. 60-90). UK: Edward Elgar Publishing. [Status: Published]

Isabelle, D. (2013). Key Factors Affecting a Technology Entrepreneur's Choice of Incubator or Accelerator. In S.M. Muegge & C. Haw (Eds.), *Business Models for Entrepreneurs and Startups: Best of TIM Review*. Talent First Network. [Status: Published]

Description: Reprint of an article published in the February 2013 issues of the TIM Review.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Isabelle, D., Semenza, L., & Dhlwayo, S. (2023). *Sustainable adoption of Fourth Industrial Revolution technologies by SMEs: The case of the South African ecosystem*. Conference of the Africa Academy of Management, Cairo, Egypt.

Description: 6th Biennial Conference of the Africa Academy of Management

Del Sarto, N., Isabelle, D., & Di Minin, A. (2022). *Corporate accelerators as technology intermediaries for growth*. R&D Management Conference, Trento, Italy.

Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). *Entrepreneurial motivations in university students*. International Congress of Psychology, Prague, Czech Republic.

Isabelle, D. (2016, August). *Innovation in Entrepreneurship Pedagogy: The Online Venture Challenge*. Conférence Innovations Pédagogiques dans l'enseignement de l'Entrepreneuriat, Quebec City, Canada-Quebec.

Description: At HEC Montreal

Isabelle, D. (2016, May). *Innovation in Entrepreneurship Pedagogy: The Online Venture Challenge*. Carleton University Spring Conference, Gananoque, Canada-Ontario.

Description: 29 May - 1 June 2016

Isabelle, D. & Nardon, L. (2013). *Bridging Cultural Distances: A cognitive perspective on migrant workers*. European Group for Organizational Studies (EGOS) Colloquium, Montreal, Canada-Quebec.

Isabelle, D. (2010). *Technology Clusters: A Canadian Experience*. International Society for Professional Innovation Management (ISPIM) Innovation Symposium, Quebec, Canada-Quebec.

Description: Dec. 12-15, 2010

Contract or Other Research

Research Grants and Awards

Grants

2021: Isabelle, D. CU COVID-19 Rapid Research Response Grants (\$6,413.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Isabelle, D. CU COVID-19 Rapid Research Response Grants (\$6,412.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Isabelle, D. CRIW Ignite! (\$5,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2019: Isabelle, D. International Research Seed Grant (\$3,575.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2019: Nardon, L. Partnership Engage Grant, Co-Investigator, Carleton University - Centre for Research & Education on Women and Work (CREWW). [Status: Funded]

2015: Isabelle, D. Start-up Funds (\$5,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2015: Isabelle, D. Start-up Funds (\$5,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board Member: PRJ Editorial Review Board

2020: Multidisciplinary Business Review.

2017 – 2019: Journal of Immigrant and Refugee Entrepreneurship.

2014 – 2019: Journal of Technoentrepreneurship.

Board of Directors: Substantial Involvement

2021: Operation Eyesight Universal.

Other Professional Service Activities

2018 – 2019: CIHR Grand Challenges Canada Peer Review Committee. External Reviewer

Reviewer: Ad Hoc Reviewer for a Journal

2010 – 2020: Technology Innovation Management Review.

2010 – 2020: Technovation.

2010 – 2017: Journal of Industry & Higher Education.

2010 – 2017: Journal of Entrepreneurship and Innovation Management.

Reviewer: Conference Paper

2010 – 2017: Administrative Sciences Association of Canada (ASAC). Occasional reviewer

2010 – 2017: Academy of Management (AOM). Occasional reviewer

2016: Academy of International Business (AIB) Annual Meeting.

Scholarly Work in Progress

Papers Under Review

Del Sarto, N., Cucino, V., Isabelle, D., & Di Minin, A. (2024). "Corporate accelerators as open innovation tools: The case of H-Farm's white label accelerator," 2nd revise and resubmit to *R&D Management*.

Isabelle, D., Han, Y., & Westerlund, M. (2020). "A machine-learning based analysis of the impacts of the COVID-19 pandemic on small business owners," Initial submission.

Description: International Small Business Journal

Isabelle, D. & Westerlund, M. (2020). "A machine learning analysis of research themes in international business conferences," Initial submission to *Critical Perspectives on International Business*.

Isabelle, D., Westerlund, M., & Sajuyigbe, V. (2020). "Building legitimacy and distinctiveness on Nigerian- Canadian transnational firms' websites," 2nd revise and resubmit to *Africa Journal of Management*.

Isabelle, D., Westerlund, M., & Mane, M. (2019). "The role of analytics in data-driven business models for digital platforms in the food industry," Initial submission to *Creativity and Innovation Management*.

Isabelle, D., Bujaki, M., & Rasouli, M. (2019). "Immigrant entrepreneurs in Canada: Role of context and identity," Initial submission to *International Journal of Entrepreneurship and Innovation Management*.

Isabelle, D., Brouard, F., Lu, I., & Heslop, L. A. (2018). "An Integrative Framework for Studying Students' Attitudes toward Entrepreneurship," Initial submission to *Entrepreneurship, Theory and Practice*.

Del Sarto, N., Isabelle, D., & Di Minin, A. (2017). "Exploring the relationship between accelerators and firm survival: Evidence from Italy," Initial submission to *Journal of Small Business Management*.

Description: Submitted Dec. 2017.

Westerlund, M., Rajala, R., Isabelle, D., & Luminen, S. (2016). "Digitalization in retailing: implications to niche food e-commerce.," Revised and resubmitted to *Journal of Research in Interactive Marketing*.

Description: December 2016

Working Papers

Akande, R. & Isabelle, D. (2024). "Effect of informality on sustainable development in West Africa: does institutional quality matter?."

Description: Journal of African Economies

Bujaki, M., Isabelle, D., & Rasouli, M. (2024). "Grounding Entrepreneurship Education for Women Immigrant Entrepreneurs in a Bourdieusian Perspective on Capital."

Description: Entrepreneurship Education and Pedagogy

Baru, O., Isabelle, D., & Pineau, S. (2024). "Climate change and societal transformation: a cohort-based international experiential learning program with an interdisciplinary focus on environmental education for graduate students."

Description: Environmental Education Research

Del Sarto, N., Cucino, V., Isabelle, D., & Di Minin, A. (2022). "Corporate accelerators as open innovation tools: The case of H-Farm's white label accelerator."

Isabelle, D. & Westerlund, M. (2022). "An application of machine learning topic modelling to research themes in international business conferences."

Isabelle, D., Brouard, F., Lu, I., & Heslop, L. A. (2019). "An Integrative Framework for Studying Students' Attitudes toward Entrepreneurship."

Bujaki, M. & Isabelle, D. (2019). "Supporting women immigrant entrepreneurs in Canada: A Bourdieusian perspective on capital.."

Lu, I., Kwan, E., Heslop, L. A., Brouard, F., & Isabelle, D. (2019). "An examination of youth entrepreneurial motivation based on self-determination theory and latent profile analysis."

Isabelle, D., Westerlund, M., Leminen, S., & Rajala, R. (2018). "Entrepreneurial perception of public venture capital and its effects on the performance of small international companies."

Bujaki, M. & Isabelle, D. (2018). "Immigrant Entrepreneurs in Canada: The interconnectedness of personal and business circumstances and priorities," targeted for Canadian Journal of Administrative Sciences.

Description: September 2018

Isabelle, D. & Heslop, L. (2018). "Globalization of science: what makes an attractive research collaborator?."

Isabelle, D. & Bujaki, M. (2018). "Reflections and Advice for Immigrant Entrepreneurs: The Perspectives of Male and Female Entrepreneurs.," targeted for Journal of Small Business Management.

Isabelle, D., Westerlund, M., Leminen, S., & Rajala, R. (2018). "Public venture capital and entrepreneurial cognizance: Effects on the performance of small international companies.."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI2701	Fundamentals of International Business	0.5	75	Main	100%
2024/Winter	IBUS5701	International Business	0.25	17	Main	100%
2023/Winter	IBUS5701	International Business	0.25	13	Main	100%
2023/Winter	BUSI4710	International New Ventures	0.5	11	Main	100%
2023/Winter	BUSI2701	Fundamentals of International Business	0.5	80	Main	100%
2023/Winter	BUSI2701	Fundamentals of International Business	0.5	80	Main	100%
2022/Winter	BUSI2701	Fundamentals of International Business	0.5	79	Main	100%
2022/Winter	BUSI2701	Fundamentals of International Business	0.5	80	Main	100%
2022/Winter	BUSI4710	International New Ventures	0.5	20	Main	100%
2022/Winter	IBUS5701	International Business	0.25	18	Main	100%
2021/Winter	BUSI2701	Fundamentals of International Business	0.5	81	Main	100%
2021/Winter	BUSI2701	Fundamentals of International Business	0.5	80	Main	100%
2019/Winter	BUSI4710	International New Ventures	0.5	21	Main	100%
2019/Winter	BUSI2701	Fundamentals of International Business	0.5	72	Main	100%
2019/Winter	BUSI2701	Fundamentals of International Business	0.5	74	Main	100%
2018/Winter	BUSI4710	International New Ventures	0.3	13	Main	59%
2018/Winter	BUSI4710	International New Ventures	0.2	9	Main	41%
2018/Winter	BUSI2701	Fundamentals of International Business	0.5	38	Main	100%
2018/Winter	BUSI2701	Fundamentals of International Business	0.5	64	Main	100%
2017/Fall	IBUS5701	International Business	0.25	35	Main	100%
2017/Fall	IBUS5701	International Business	0.25	34	Main	100%
2017/Winter	IBUS5701	International Business	0.25	29	Bogota	100%
2017/Winter	BUSI2701	Fundamentals of International Business	0.5	90	Main	100%
2017/Winter	BUSI2701	Fundamentals of International Business	0.5	90	Main	100%
2016/Fall	IBUS5701	International Business	0.25	23	Main	100%

2016/Fall	IBUS5701	International Business	0.25	35	Main	100%
2016/Fall	BUSI2701	Fundamentals of International Business	0.5	85	Main	100%
2016/Winter	BUSI2800	Entrepreneurship	0.06	2	Main	12%
2016/Winter	BUSI3810	Business Development	0.5	33	Main	100%
2016/Winter	BUSI2800	Entrepreneurship	0.44	14	Main	88%
2016/Winter	BUSI2800	Entrepreneurship	0.5	99	Main	100%
2015/Fall	BUSI2800	Entrepreneurship	0.5	85	Main	100%
2015/Fall	IBUS5701	International Business	0.25	33	Shanghai	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2015-2016: External examiner., Weiwen Yu

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2021-2022: Tenure and Promotion Committee - Departmental (Cluster I)

2020-2021: Small Business Resource Directory

Sprott School of Business, Carleton University

School Assignments

Other Committees:

2021-2022 – 2024-2025: Queen Elizabeth Advanced Scholars – West Africa, Member of Governing Committee

H. OTHER

Student Experience Activities

2023 - Transformed 4th UG course International New Venture into a new IB division of SSCG for W23 : Transformed 4th UG course International New Venture into a new IB division of Sprott Student Consulting Group for W 23, under a CU Experiential Learning Fund.

Credentials

Professional Memberships

Academy of International Business, N/A

Academy of Management, N/A

Administrative Science Association of Canada, N/A

Africa Academy of Management, N/A

International Society for Professional Innovation Management, N/A

Order of Engineers of Quebec, N/A

Skills

Languages

Fluently bilingual (English, French)

Paid Service Experience

2017: National Research Council

2015: The Funding Portal

2014: National Research Council

2012: Industry Canada

Research Reports

2022: Isabelle, D., & Bujaki, M., Knowledge Synthesis of Mentorship and Sponsorship Strategies and Programs Available to Women in Key Economic Sectors that are Growing and Emerging., submitted to Women and Gender Equality Canada.

2018: Isabelle, D., Idea-to-Development Program Evaluation., submitted to NRC Industrial Research Assistance Program.

2015: Isabelle, D., Investing in Canada's Northern and Aboriginal Communities., submitted to The Funding Portal.

2014: Isabelle, D., Project impacts comparison study., submitted to Report to NRC Industrial Research Assistance Program..

2012: Isabelle, D., Research on business incubators and accelerators in Canada., submitted to Industry Canada.

Service to the Community

Member of a Committee

2022 – 2023: Operation Eyesight, Operation Eyesight, Representative of Canadian Board of Directors on development of global strategic plan 2023-2027.

Positions Held in Civic Organizations

2011 – 2017: Advisor, The Funding Portal, Public funding expert and advisor for The Funding Portal, a Canadian private venture corporation that provides an expert funding service for business entrepreneurs and universities to access government funding and private financing marketplace.

Curriculum Vitae - Sprott School of Business

Shaobo Ji, PhD
Full Professor - Tenured, 2004
Sprott School of Business (Information Technology/Information Systems)
Telephone: 613-520-2600 x5751
Email: shaobo.ji@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-0932-6758>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Waterloo.
Master of Business Administration. Babson College.
Bachelor of Engineering. Dalian University of Technology.

B. EMPLOYMENT

Academic Appointments

Associate Dean, Research & International and Director, Graduate Research Programs, Sprott School of Business (July, 2019 - Present), Ottawa, Canada-Ontario.
Professor, Sprott School of Business, Carleton University (July, 2019 - Present), Ottawa, Canada-Ontario.
Adjunct Professor, Dalian University of Technology (January, 2002 - Present), Dalian, China.
Associate Dean, Professional Graduate Programs, Sprott School of Business, Carleton University (July, 2017 - June, 2019), Ottawa, Canada-Ontario.
Associate Professor, Sprott School of Business, Carleton University (July, 2000 - June, 2019), Ottawa, Canada-Ontario.
Assistant Professor, University of Northern B.C. (January, 1995 - December, 1997), Prince George, Canada-British Columbia.
Lecturer, Dalian University of Technology (January, 1982 - May, 1989), Dalian, China.

Other Employment

Systems Analyst, Cognos Inc. (January, 2000 - June, 2000), Ottawa, Canada-Ontario.
Systems Analyst, EDS Canada Inc. (January, 1998 - December, 1999), Ottawa, Canada-Ontario.
Systems Analyst, Accenture (January, 1994 - December, 1994), Ottawa, Canada-Ontario. Formerly Andersen Consulting

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	2	11		13
Articles-in-Progress (All)		7		7
Publications in Conference Proceedings (Refereed)		5		5
Grants - Funded (both refereed and non-refereed)		4		4
Totals	2	27		29

Refereed Scholarly Publications

Articles in Refereed Journals

Guo, F., Zhou, W., Wang, Z., Ju, C., Ji, S., Qibei Lu (2023). A link prediction method based on topological nearest-neighbors similarity in directed networks. *Journal of Computational Science*, 69, 102002. [A,Other]
Wang, Y., Neilson, L., & Ji, S. (2023). Mindfulness Through Agency in Health Consumption: Empirical Evidence from Committed Dietary Supplement Consumers. *Journal of Consumer Affairs*, 57 (2), 871-905. [A]
Wang, Y., Neilson, L., & Ji, S. (2023). Why and How Do Consumer Use Dietary Supplements? A Systematic Review and Thematic Analysis. *Health Promotion International*, 38 (1), daac197. [A]

- Deng, Q., Hine, M., Ji, S., & Wang, Y. (2023). What Makes Brand Social Media Posts Engaging? An Integrative Framework and Future Research Agenda. *Journal of Internet Commerce*, 22 (1), 1-39. [B]
Published online with DOI in 2021
- Guo, F., Wang, Z., Ji, S., & Lu, Q. (2022). Influential Nodes Identification in the Air Pollution Spatial Correlation Weighted Networks and Collaborative Governance: Taking China's Three Urban Agglomerations as Examples. *International Journal of Environmental Research and Public Health*, 19 (8), 4461. [B,Other]
(Unranked journal), Scopus CiteScore (2021): 4.4; impact factor: 3.39 (2020); H-index: 113; Q2; SSCI and SCIE)
- Guo, F., Zhang, L., Wang, Z., & Ji, S. (2022). Research on determining critical carbon emission influencing factors and carbon reduction optimization strategies: applying GRA and improved STIRPAT model: Taking the Yangtze River Delta as an Example. *International Journal of Environmental Research and Public Health*, 19 (14), 8791. [B,Other]
(Unranked journal) Scopus CiteScore (2021): 4.4; impact factor: 3.39 (2020); H-index: 113; Q2; SSCI and SCIE)
- Lu, Q., Gus, F., Zhou, W., Wang, Z., & Ji, S. (2022). Mobile social recommendation model integrating users' personality traits and relationship strength under privacy concerns. *Systems*, 10 (6), 1-25. [B,Other]
(Unranked journal) (IF: 2.895 (2021); 5-Year Impact Factor: 2.410 (2021); Indexed within Scopus, SSCI (Web of Science); CiteScore: 4.3 (2021); H-index: 84; Journal rank: JCR - Q2 (Social Sciences, Interdisciplinary)
- Deng, Q., Wang, Y., Rod, M., & Ji, S. (2021). Speak to head and heart: The effects of linguistic features on B2B brand engagement on social media. *Industrial Marketing Management*, 99, 1-15. [A+]
- Deng, Q., Hine, M., Ji, S., & Wang, Y. (2021). Understanding consumer engagement with brand posts on social media: The effects of post linguistic styles. *Electronic Commerce Research and Applications*, 48, 101068. [B]
- Wang, Y., Rod, M., Deng, Q., & Ji, S. (2021). Exploiting Business Networks in the Age of Social Media: The Use and Integration of Social Media Analytics in B2B Marketing. *Journal of Business and Industrial Marketing*, 36 (12), 2139-2149. [A]
2022 Update: published with volume and issue numbers on November 23, 2021
Forthcoming, accepted for publication [Vol. ahead-of-print No. ahead-of-print.]
- Wang, T., Rod, M., Ji, S., & Deng, Q. (2021). A Thematic Exploration of Social Media Analytics in Marketing Research and an Agenda for Future Inquiry. *Journal of Strategic Marketing*, 29 (6), 471-491. [A]
2022 Update: volume and issue numbers assigned in 2021
Forthcoming, Published online 2020-04-24 Received 19 Jun 2018, Accepted 07 Apr 2020, Published online: 24 Apr 2020
- Wang, Y., Deng, Q., & Ji, S. (2019). Understanding Café Culture: Toward a Dynamic and Holistic Research Framework. *Journal of Global Marketing*, 32 (1), 377-348. [B]
Published online: 31 Jan 2018.
- Deng, Q., Hine, M., Sur, S., & Ji, S. (2019). Inside the Black Box of Dictionary Building for Text Analytics: A Design Science Approach. *Journal of International Technology and Information Management*, 27 (3), 7. [C]
Updated on Jan 16, 2020 Forthcoming
- Deng, Q., & Ji, S. (2018). A Review of Design Science Research in Information Systems: Concept, Process, Outcome, and Evaluation. *Pacific Asia Journal of the Association for Information Systems*, 10 (1), 1-36. [B]
- Wang, Y., Rod, M., Ji, S., & Deng, Q. (2017). Social Media Capability in B2B Marketing: Toward a Definition and a Research Model. *Journal of Business and Industrial Marketing*, 32 (8), 1125-1135. [A]
- Ji, S., Deng, Q., & Wang, Y. (2017). Green IT Practice Disclosure: An Examination of Corporate Sustainability Report in IT Sector. *Journal of Information, Communication and Ethics in Society*, 15 (2), 145-164. [B]
- Jiang, X., & Ji, S. (2015). E-government web portal adoption: The effects of service quality. *e-Service Journal*, 9 (3), 43-60. [B]
- Deng, Q., & Ji, S. (2015). Organizational Green IT Adoption: Concept and Evidence, Sustainability. *Sustainability*, 7 (12), 16737-16755. [C,Other]
Special Issue "Resilient Businesses: Assessment, Approaches and Technology"
- Shahsavaran, N., & Ji, S. (2014). Research in information technology service management (ITSM) (2000-2010): An overview. *International Journal of Information Systems in the Service Sector*, 6 (4), 76-94. [C]
<http://www.igi-pub.com/ijiss>
- Wang, J., & Ji, S. (2014). Research and application on auto-word building. *Computer Science*, 41 (11), 256-259.
in Chinese. (http://www.jsjxx.com/jsjxx/ch/reader/view_fixed_content.aspx?id=next_issue; or
http://www.jsjxx.com/jsjxx/ch/reader/issue_list.aspx?year_id=2014&quarter_id=11&Submit.x=14&Submit.y=13; journal site:
<http://www.jsjxx.com/jsjxx/ch/index.aspx>)
- Ji, S., & Deng, Q. (2014). The Role of Gender in Individual and Group Decision Making: A Research Model. *Open Journal of Social Sciences*, 2 (3), 30-33.
- Ji, S., & Zhong, Q. (2013). Research of Context-oriented Adaptive Content Framework in Seamless Learning. *Information Technology*, 4, 66-68.
<http://kns.cnki.net/kcms/detail/detail.aspx?dbcode=CJFD&filename=HDZJ201304022&dbname=CJFD2013>
- Wang, J., & Ji, S. (2012). Mining concept map based on Chinese syntax tree. *Journal of Dalian Maritime University*, 38 (4).
in Chinese

- Min, Q., Liu, Z., & Ji, S. (2011). A study of mobile instant messaging adoption: Within-culture variation. *International Journal of Mobile Communications*, 9 (3), 280-297.
- Jiang, X., & Ji, S. (2011). User adoption of E-government portals: A comparative study based on service level. *Library and Information Services*, 55 (11), 134-138.
in Chinese
- Jiang, X., Ji, S., & Zhong, Q. (2011). Study of citizen's adoption of e-government service: an empirical study. *Journal of Science Research Management*, 32 (1), 129-136.
in Chinese
- Ji, S., Sun, Y., Yu, X., & Li, Y. (2010). Influence Mechanism of Macro-economic Variance on Interest Rate term Structure. *Technology Economics*, 29 (6), 99-101.
in Chinese
- Jiang, X., Zhong, Q., & Ji, S. (2010). A framework of citizen e-government adoption: A process based view. *Journal Intelligence*, 29 (3), 30-34.
in Chinese
- Jiang, X., Zhong, Q., & Ji, S. (2010). Research in online privacy: Concept, research progress and trend. *Information Science*, 28 (2), 305-310.
in Chinese
- Jiang, X., Zhong, Q., & Ji, S. (2010). Study on trust factors of citizen adoption of E-government. *Journal Intelligence*, 29 (1), 37-41.
in Chinese
- Liu, Z., Min, Q., & Ji, S. (2010). An empirical study of mobile securities management systems adoption: A task-technology fit perspective. *International Journal of Mobile Communications*, 8 (2), 230-243.

Articles in Refereed Conference Proceedings

Full Paper

- Deng, Q., Hine, M., & Ji, S. (2022). Symposium: Improving Text Analytics Using Content Dictionaries. *Society for Industrial and Organizational Psychology (SIOP) Annual Conference*.
- Deng, Q., Hine, M., Ji, S., & Wang, Y. (2020). Investigating the Impacts of Brand Social Media Posts' Linguistic Styles on Consumer Engagement. *Hawaii International Conference on System Sciences*, 2741 – 2750.
Maui, Hawaii, USA
- Deng, Q., Hine, M., Ji, S., & Wang, Y. (2020). Consumer Engagement with Brand Posts on Social Media: Current State and Research Agenda. *Hawaii International Conference on System Sciences*, 4089-4098.
Maui, Hawaii, USA
- Nazari, A., Weiss, M., Shah, A., & Ji, S. (2019). Innovation Management Journal Analysis using Topic Modelling Approaches. *International Society for Professional Innovation and Management (ISPIM) Connects*.
Ottawa, Canada, April 7 – 10, 2019
- Wang, Y., Ji, S., Rod, M., & Deng, Q. (2019). Applying Bourdieu's practice theory to social commerce: toward a dynamic process-oriented research framework. *International Conference on Information Resources Management (Conf-IRM)*.
Auckland, New Zealand, May 27-29, 2019
- Ji, S., Wang, Y., & Deng, Q. (2017). Applying third Place Theory in Mobile Social Media Research: The Physical-Virtual Integration. *Conf-IRM*.
Wang, Y., Deng, Q., and Ji, S. (2017) Applying third Place Theory in Mobile Social Media Research: The Physical-Virtual Integration, 2017 Conf-IRM Conference Proceedings, Santiago, Chile, May 17-19.
- Ji, S., Deng, Q., & Wang, Y. (2017). Decision Science Research in Information Systems: A Systemic Literature Review 2001-2015. *Conf-IRM*.
Deng, Q., Ji, S., and Wang, Y. (2017) Decision Science Research in Information Systems: A Systemic Literature Review 2001-2015, 2017 Conf-IRM Conference Proceedings, Santiago, Chile, May 17-19.
- Ji, S., Wang, Y., & Deng, Q. (2017). Green IT Practices across Industries: A Text-Mining based Analysis. *Americas Conference on Information Systems (AMCIS)*.
Deng, Q., Ji, S., and Wang, Y. (2017) Green IT Practices across Industries: A Text-Mining based Analysis, 23rd Americas Conference on Information Systems, Boston, USA, August 10-12.
- Deng, Q., Hine, M., Sur, S., & Ji, S. (2017). Building an Environmental Sustainability Dictionary for the IT Industry. *Hawaii International Conference on System Sciences (HICSS)*.
- Deng, Q., Wang, Y., & Ji, S. (2015). A Review of Social Media Use in Enterprises. *International Conference on Information Resources Management (Conf-IRM)*.
May 18-20, 2015, Ottawa, Ontario, Canada.
- Deng, Q., Ji, S., & Wang, Y. (2015). Green IT Practice Disclosure: An Examination of Corporate Sustainability Report in IT Sector. *International Conference on Information Systems (ICIS)*.
December 13-16, 2015. Forth Worth, Texas, USA.
The paper is accepted, to be presented in the "Breakout Ideas" track, and to be included in the 2015 ICIS proceedings.

- Deng, Q., & Ji, S. (2015). Organizational Green IT Adoption: Concept and Evidence. *Americas Conference on Information Systems (AMCIS)*. August 13-15, 2015. San Juan, Puerto Rico.
- Wang, Y., Deng, Q., & Ji, S. (2015). Why Organizations Adopt Green IT: A Comprehensive Review. *International Conference on Information Resources Management (Conf-IRM)*. May 18-20, 2015. Ottawa, Ontario, Canada.
- Wang, Y., Rod, M., & Ji, S. (2015). Industrial Tweeting: A Critical Review on the Use of Social-Media in B2B Marketing. *Australia and New Zealand Marketing Academy Conference (ANZMAC)*. November 30 - December 2, 2015. Sydney, Australia.
- Ji, S. (2014). Online Electronic Thesis Support System at Maritime University: A Teaching Case for Systems Analysis and Design Course. *Americas Conference on Information Systems (AMCIS)*. (<http://elibrary.aisnet.org/Default.aspx?url=http://aisel.aisnet.org/cgi/viewcontent.cgi?article=1177&context=amcis2014>) August 7-9, 2014. Savannah, Georgia, USA.
- Deng, Q., & Ji, S. (2014). The Role of Gender in Individual and Group Decision Making: A Research Model. *International Conference on Engineering and Business Management (EBM)*. March 10-12, 2014. Suzhou, China.
- Jiang, X., & Ji, S. (2014). E-Government Web Portal Adoption: A Service Level and Service Quality Perspective. *Hawaii International Conference on System Sciences (HICSS)*, 2179-2188. January 5-9, 2014. Big Island, Hawaii, USA.
- Ji, S., Zhong, Q., & Liu, X. (2013). Research of Context-oriented Adaptive Content Framework in Seamless Learning. *International Conference on Education Technology and Management Science*. Zhong, Q., Liu, X. Ji, S. (2013) Research of Context-oriented Adaptive Content Framework in Seamless Learning, International Conference on Education Technology and Management Science (ICETMS 2013), June 8-9, 2013, Nanjing, Jiangsu, China, pp.711-714.
- Ahmed, Z., & Ji, S. (2013). Business analytics: current state and challenges. *International Conference on Information Resources Management (Conf-IRM)*. May 22-24, 2013. Natal, Brazil.
- Ahmed, Z., & Ji, S. (2013). Business Analytics: What drives the value? *International Conference on Information Resources Management (Conf-IRM)*. Natal, Brazil
- Qu, G., Ji, S., & Nsakanda, A. L. (2012). Complexity and Knowledge Transfer in Global Software Outsourcing Project Teams: A Transactive Memory Systems Perspective. *Hawaii International Conference on System Sciences (HICSS)*, 3776-3785. January 4-7, 2012. Maui, Hawaii, USA.
- Cao, Y., Nsakanda, A. L., Diaby, M., Ji, S., & Hine, M. J. (2012). Exploring Contracts With Options in Loyalty Reward Programs Supply Chain. *Hawaii International Conference on System Sciences (HICSS)*, 1257-1266. January 4-7, 2012. Maui, Hawaii, USA. Nominated for best paper.
- Ahmed, Z., & Ji, S. (2012). Data Security in Cloud Computing: Risks and Challenges. *Institute for Operations Research and Management Sciences (INFORMS) International Conference*. June 24-27, 2012. Beijing, China.
- Shahsavaran, N., & Ji, S. (2011). Research in Information Technology Service Management (ITSM): Theoretical Foundation and Research Topic Perspectives. *International Conference on Information Resources Management (Conf-IRM)*. June 12-14, 2011. Seoul, Korea.
- Shahsavaran, N., & Ji, S. (2011). Research in Information Technology Service Management (ITSM) (2000-2010): An Overview. *Administrative Sciences Association of Canada (ASAC)*. July 2-5, 2011. Montreal, Canada.
- Liu, Y., & Ji, S. (2010). Enterprise Blog Categorization and Business Value. *International Conference on Information Resources Management (Conf-IRM)*. May 16-18, 2010. Montego Bay, Jamaica.
- Min, Q., Liu, Z., & Ji, S. (2010). Communication Effectiveness in Global Virtual Teams: A Case Study of Software Outsourcing Industry. *Hawaii International Conference on System Sciences (HICSS)*. January 5-8, 2010. Koloa, Hawaii, USA.
- Ramirez, A., Ji, S., Riordan, R., Ulbrich, F., & Hine, M. (2010). Empowering Business Students: Using Web 2.0 Tools in the Classroom. *International Conference on Computer Supported Education*. April 7-10, 2010. Valencia, Spain.

Abstract Only

- Wang, Y., Rod, M., Ji, S., & Deng, Q. (2018). Neuroscience in Marketing: A literature review. *Administrative Sciences Association of Canada (ASAC)*.

Toronto, Canada.

Wang, Y., Deng, Q., Rod, M., & Ji, S. (2018). Social media analytics in Marketing: A systematic and thematic literature review. *Administrative Sciences Association of Canada (ASAC)*.

Toronto, Canada.

Other (Non-refereed) Scholarly Publications

Articles in non-Refereed journals

Basic or Discovery Scholarship

Guo, F., Liu, Z., Lu, Q., Ji, S., & Zhang, C. (2024). Social Media Public Opinion about COVID-19 in China on Microblog Platform: Topic Modeling and Multidimensional Sentiment Analysis. *Journal of Medical Internet Research*, 26.

Guo, F., Wang, Z., Wang, X., Lu, Q., & Ji, S. (2024). Dual-view multi-modal contrastive learning for graph-based recommender systems. , 116.

Received 27 October 2023, Revised 11 March 2024, Accepted 21 March 2024, Available online 29 March 2024, Version of Record 29 March 2024.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Associate Editor

2016 – 2024: Journal of Global Information Management (International).

Presentations

Papers Presented at Conferences

Refereed

Ahmed, Z. & Ji, S. (2012). *Cloud Computing: Current state and Challenges*. Institute for Operations Research and Management Sciences (INFORMS) International Conference, Beijing, China.

Cao, Y., Nsakanda, A., Diaby, M., Ji, S., & Hine, M. J. (2012). *Exploring Contracts with Options in Loyalty Reward Programs Supply Chain*. Hawaii International Conference on System Sciences (HICSS), Maui, Hawaii.

Description: January 4-7

Qu, G., Ji, S., & Nsakanda, A. (2012). *Project complexity and Knowledge Transfer in Global outsourcing Project teams*. Hawaii International Conference on System Sciences (HICSS), Maui, Hawaii.

Description: January 4-7

Non-Refereed

Ji, S. (2015). *Corporate Sustainability and Green IT Adoption: A Review of Relevant Organizational Issues*. Invited presentation at International Workshop on the Theories and Practices of Green Growth., Dalian, China.

Description: Invited paper, Presented, as a keynote speaker, at the International Workshop on the Theories and Practices of Green Growth, April 11-12, 2015, Dalian, China.

Contract or Other Research

Research Grants and Awards

Grants

2022: Ji, S. Business Strategy Internship (\$10,000.00), Principal Investigator, PRI-Mitacs. [Status: Funded]

2022: Ji, S. Business Strategy Internship (\$10,000.00), Principal Investigator, Connected Canadians. [Status: Funded]

2021 [Year 2 of 2]: Lee, I. & Ji, S., Multidisciplinary Research Catalyst Fund, Co-Investigator, PRI-Carleton University. Co-applicant. [Status: Funded]

2020 [Year 1 of 2]: Lee, I. & Ji, S., Multidisciplinary Research Catalyst Fund, Co-Investigator, PRI-Carleton University. Co-applicant. [Status: Funded]

2016: Ji, S. Insight Grant, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board Member: PRJ Editorial Review Board

2007 – 2016: Journal of Global Information Management.

Chair: Conference / Track / Program

2021: International Conference on Information Resources Management.

2015: International Conference on Information Resources Management (Conf-IRM), Ottawa, Canada. Track Co-chair, Information Security, Privacy, and Risk Management, May 18-20, 2015.

2014: International Conference on Information Resources Management (Conf-IRM), HoChi Minh City, Viet Nam. Track Co-chair, Information Security, Privacy, and Risk Management, May 21 – 23, 2014.

2013: International Conference on Information Resources Management (Conf-IRM), Natal, Brazil. Track Co-chair, Information Security, Privacy, and Risk Management, May 22 – 24, 2013.

2012: International Conference on Information Resources Management (Conf-IRM), Vienna, Austria. Track Co-chair, Information Security, Privacy, and Risk Management, 2012 International Conference on Information Resources Management (Conf-IRM), Vienna, Austria, May 21-23, 2012.

2012: Americas Conference on Information Systems (AMCIS), Seattle, Washington. Track Co-chair, Track - End-user information systems, innovation, and change, Minitrack - Organizational routines, work processes, and employee performance, 2012 AMCIS, August 9-12, 2012.

2011: International Conference on Information Resources Management (Conf-IRM), Seoul, Republic of Korea. Track Co-chair, ICT in the Asia Pacific Track, 2011 International Conference on Information Resources Management (Conf-IRM), Seoul, South Korea, June 12 -14, 2011.

2010: International Conference on Information Resources Management (Conf-IRM), Montego Bay, Jamaica. Track Chair, Information Security, Privacy, and Risk Management, 2010 International Conference on Information Resources Management (Conf-IRM), May 16-18, 2010.

Member: Committee/Task Force

2010: International Conference on e- Government, Cape Town, South Africa. Member of Organizing and Program Committee, 6th International Conference on e- Government, Cape Peninsula University of Technology, September 30th to October 1st, 2010.

2010: International Workshop on Intelligent E-government and Emergency Management, Toronto, Canada-Ontario. Member of Program Committee and Member of Workshop Organizing Committee, August 31 – September 3, 2010.

Other Professional Service Activities

2010 – 2012: Ontario Graduate Scholarship Competition, Ministry of Training, Colleges and Universities, Ontario. Panelist

Reviewer - External Tenure

2021: Dalhousie University, Canada.

2021: Carnegie Mellon University, USA.

Reviewer: Ad Hoc Reviewer for a Journal

2014: Journal of Global Information Management. Reviewed two papers

2014: Information & Management. One paper reviewed

2014: Canadian Journal of Administrative Science. One paper reviewed

2013: Journal of Global Information Management. Reviewed two (2) papers

2013: Nankai Management Review. Reviewed one (1) paper

2013: Mathematical Problems in Engineering. Reviewed one (1) paper

2011 – 2012: Journal of Global Information Management. Reviewed two (2) papers

2011: Journal of Theoretical and Applied Electronic Commerce Research. Reviewed one (1) paper submitted to Journal of Theoretical and Applied Electronic Commerce Research, Special Issue on Business Models for Mobile Platforms

2010: Journal of Global Information Management. Reviewed two (2) papers

Reviewer: Conference Paper

2014: Americas Conference on Information Systems (AMCIS). Reviewed three papers

2013: Hawaii International Conference on System Sciences (HICSS). Reviewed four (4) papers

2012: Hawaii International Conference on System Sciences (HICSS). Reviewed three (3) papers

2012: International Conference on Information Resources Management (Conf-IRM). Reviewed five (5) papers

2011: International Conference on Information Resources Management (Conf-IRM). Reviewed two (2) papers

2011: International Conference on Information Systems (ICIS). Reviewed one (1) paper

2010: International Conference on Information Resources Management (Conf-IRM). Reviewed five (5) papers

2010: International Conference on e- Government. Reviewed one (1) paper

Scholarly Work in Progress

Papers Under Review

Ji, S. (2020). "Understanding Consumer Engagement with Brand Posts on Social Media: The Effects of Post Linguistic Styles," Revised and resubmitted.

Description: International Journal of Electronic Commerce

Ji, S. (2020). "Consumer Engagement with Brand Posts on Social Media: An Integrative Model and Agendas for Future Research," Revised and resubmitted to *Journal of Research in Interactive Marketing*.

Wang, Y., Ji, S., Rod, M., & Deng, Q. (2018). "A Thematic Exploration of Social Media Analytics in Marketing and an Agenda for Future Inquiry," Initial submission to *Journal of Business Research*.

Wang, Y., Ji, S., Rod, M., & Deng, Q. (2018). "Method or Phenomenon? Unveiling the Social Media Analytics in Marketing," Initial submission to *Marketing Intelligence and Planning*.

Working Papers

Wang, Y., Rod, M., Deng, Q., & Ji, S. (2024). "How can health professionals persuade consumers in the digital age? The social dynamics within the online field of health consumption," targeted for *Journal of Consumer Behavior*.

Wang, Y., Neilson, L., & Ji, S. (2022). "Localization of Dietary Supplement Consumption in China: The Power of Social Structure, Culture, and History," targeted for *Consumption Markets and Culture*.

Zhou, W., Guo, F., Wang, Z., Ju, C., Ji, S., Qibei Lu, (2022). "A link prediction method based on topological nearest-neighbors similarity in directed networks," targeted for *Journal of Computational Science*.

Uruthirapathy, A., McKay, R., & Ji, S. (2022). "Whistleblowing and Moral Courage Within Collective Cultures: A Comparative Analysis Between China and Colombia," targeted for *International Journal of Cross Cultural Management*.

Ji, S. (2019). "Cloud computing for organizations: the good, the bad, and the ugly."

Ji, S. (2019). "Decision making in the age of big data and data analytics."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2023/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	23	Shanghai	100%
2023/Winter	BUSI6400	Seminar in Information Systems I	0.43	6	Main	100%
2023/Winter	BUSI5480	Seminar in Information Systems I: Research Issues	0.07	1	Main	100%
2022/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	38	Shanghai	100%
2021/Summer	BUSI6907	PhD Thesis Tutorial	0.5	17	Main	100%
2021/Summer	BUSI6900	Directed Readings	0.5	2	Main	100%
2021/Summer	BUSI5906	Special Topics	0.25	34	Shanghai	100%
2021/Winter	BUSI6900	Directed Readings	0.5	5	Main	100%
2021/Winter	BUSI5906	Special Topics	0.25	29	Shanghai	100%
2021/Winter	BUSI6907	PhD Thesis Tutorial	0.5	18	Main	100%
2021/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	31	Shanghai	100%
2020/Fall	BUSI6400	Seminar in Information Systems I	0.45	8	Main	100%
2020/Fall	BUSI5480	Seminar in Information Systems I: Research Issues	0.05	1	Main	100%
2020/Fall	BUSI6907	PhD Thesis Tutorial	0.5	17	Main	100%
2020/Summer	BUSI6907	PhD Thesis Tutorial	0.5	15	Main	100%
2020/Summer	BUSI6900	Directed Readings	0.5	8	Main	100%
2020/Winter	BUSI6907	PhD Thesis Tutorial	0.5	16	Main	100%
2019/Fall	BUSI6900	Directed Readings	0.5	1	Main	100%
2019/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	28	Shanghai	100%
2019/Fall	BUSI6907	PhD Thesis Tutorial	0.5	21	Main	100%
2019/Summer	BUSI6907	PhD Thesis Tutorial	0.5	18	Main	100%
2019/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	21	Main	100%
2019/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	35	Main	100%

2019/Winter	BUSI5900	Directed Studies	0.5	1	Main	100%
2018/Fall	BUSI6400	Seminar in Information Systems I	0.5	2	Main	100%
2018/Summer	BUSI5905	Special Topics	0.5	1	Main	100%
2018/Winter	DATA5000	Data Science Seminar	0.25	9	Shanghai	
2017/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	19	Shanghai	100%
2017/Fall	BUSI5900	Directed Studies	0.5	1	Main	100%
2017/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	33	Shanghai	100%
2017/Summer	ITIS5401	Fundamentals IT Service Mgmt	0.25	28	Shanghai	100%
2017/Winter	ITIS5401	Fundamentals IT Service Mgmt	0.25	41	Shanghai	100%
2017/Winter	BUSI3402	Systems Analysis & Design	0.5	59	Main	100%
2016/Fall	BUSI4400	IS Strategy, Management & Acquisitions	0.5	34	Main	100%
2016/Summer	ITIS5401	Fundamentals IT Service Mgmt	0.25	28	Shanghai	100%
2016/Summer	ITIS5401	Fundamentals IT Service Mgmt	0.25	10	Bogota	100%
2016/Winter	BUSI3402	Systems Analysis & Design	0.5	51	Main	100%
2015/Fall	ITIS5401	Fundamentals IT Service Mgmt	0.25	33	Shanghai	100%
2015/Fall	BUSI4400	IS Strategy, Management & Acquisitions	0.5	31	Main	100%
2015/Summer	BUSI5803	Managerial Economics	0.25	33	Shanghai	50%

Service to the institution (Academic)

Faculty Assignments

MBA Projects:

2010-2011: Chengyao Yuan: Automobile Industry Analysis in China: A Case Study of Brilliance China Automotive Holdings Limited

2010-2011: Hamid Reza Ghaffari, Implementing Enterprise Service Oriented Architecture (SOA): A Case Study of E-Registration in Iranian National Organization for Development of Exceptional Talents (NODET)

2010-2011: Jeremy Hutchinson: Developing an Operating Model: Case of Bank of Canada's IT Department

2010-2011: Ayeh Atrafi: Study on Behavior of Online Foreign Hotel Reservation in Tehran

Faculty Assignments

MBA Projects:

2010-2011: Jian Yang: Doing Business in China: A Case Study of a Canadian Steel Housing Company

Faculty Assignments

MBA Projects:

2010-2011: Radmehr Khamooshi: Business-IT Strategic Alignment in Enterprise Resource Planning (ERP) Project Implementation in Iran Khodro Company

2010-2011: Scott Gonsalves: The importance of relational mechanisms to IT governance: a case study in higher education

PhD. Comprehensive Committees:

2016-2017: Valérie Gamache-O'Leary: Social Capital: Implications for the Top Management Team

2013-2014: Mohammed Alwan: Factors that Influence International Mobility of People with an emphasis on International Mobility of Students

2013-2014: Christian Stone: The Entrepreneurial Opportunity Recognition Process: Towards a Framework

2011-2012: David Hudson: Managing Disruptive Technology in Industry

PhD. Thesis Committees:

2013-2014 – 2017-2018: Yun Wang

2013-2014 – 2017-2018: Qi Deng

2015-2016: Allen Brown: Exploring IT Governance Effectiveness: Identifying Sources of Divergence through the Adoption of a Behavioural-Based Organizational Routines Perspective

2011-2012 – 2014-2015: Zafor Ahmed

2013-2014: William MacKinnon: The Impact of Electronic Medical Records Systems on Healthcare Subunit Performance: A Dynamic Capabilities Study

2012-2013: David Hudson

2011-2012: Ajit Thomas: A study of the strategic value, uses and effects of corporate performance management (CPM) systems from a dynamic capability perspective

2010-2011: Manjari Maheshwari: Assessing the impact of social capability, technical capability, and their fit on software development team performance: an empirical study

University Assignments

Masters Thesis Committees:

2011-2012: Howard Rosenblum: Types of Communication Enabled Application Mashups

University Assignments

PhD. Thesis Committees:

2020-2021: Ghazi Alsuruji, Mechanical & Aerospace Engineering, Carleton University

2019-2020: Anandkumar Chelliah, Civil Engineering

2019-2020: External Examiner, Pouyan Eslami, McMaster University

2019-2020: Ghazi Alsuruji, Mechanical & Aerospace Engineering

External Committees

Thesis Assignments

PhD. Thesis Committees:

2016-2017: Ken Owen: Motivation and demotivation of hacker activities – a contextual approach

Thesis Assignments

PhD. Thesis Committees:

2012-2013: Supervisor-PhD thesis: Dalian University of Technology

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: FTPC Committee (Co-Chair)

2023-2024: Canada Research Chair - Tier 2 Hiring Committee

2019-2020 – 2023-2024: Research Committee

2022-2023: CRC Tier 2 in Business Analytics Hiring Committee

2021-2022: Canada Research Chair - Tier 2 Hiring Committee

2019-2020 – 2020-2021: Curriculum Review Committee (Graduate Research Programs - PhD and MSc)

2017-2018 – 2018-2019: Curriculum Review Committee (MBA)

2017-2018 – 2018-2019: Curriculum Review Committee (MAcc) (Co-Chair)

2014-2015: Faculty Board

Credentials

Skills

Languages

English and Chinese – fluent (read, write, speak)

Curriculum Vitae - Sprott School of Business

Guoliang (Frank) Jiang, PhD
Associate Professor - Tenured, 2016
Sprott School of Business (International Business)
Telephone: 613-520-2600 x1502
Email: frank.jiang@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
Orcid: <https://orcid.org/0000-0002-4235-2237>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Western Ontario.
Master of Business Administration. Richard Ivey School of Business, University of Western Ontario.
Bachelor of Science. Shanghai Jiao-Tong University.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (2016 - Present), Ottawa, Canada-Ontario.
Associate Professor, Rowe School of Business, Dalhousie University (2015 - 2016), Halifax, Canada-Nova Scotia.
Assistant Professor, Rowe School of Business, Dalhousie University (2010 - 2015), Halifax, Canada-Nova Scotia.
Instructor, University of Western Ontario (2007 - 2008), London, Canada-Ontario. Strategy, Department of Management & Organizational Studies

C. PROFESSIONAL HONOURS

2010: Best Paper Proceedings, Academy of Management. Jiang, G. & Holburn, G. (2010). "Is foreign investment for outperformers or underperformers? The international expansion of Japanese machinery firms, 1986-2002." Academy of Management conference, Montreal, QC.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	3	4		7
Publications in Conference Proceedings (Refereed)	1	4		5
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings		1	2	3
Paper Presentations (Refereed)		4		4
Grants - Funded (both refereed and non-refereed)	4	2		6
Totals	8	15	2	25

Refereed Scholarly Publications

Articles in Refereed Journals

Southam, C., Jiang, G., Todd, J., & Tonkin, I. (2024). Impact of post-IPO investments on the long-term financial market performance of Japanese IPOs: A preregistered report. *Pacific Basin Finance Journal*, 86. [A]
Yang, Y., Jiang, G., & Konrad, A. M. (2023). From Home to Corner Office: How Work-Life Programs Influence Women's Managerial Representation in Japan. *Journal of Management*. [A+]
DOI only
Jiang, G., Reuer, J., Southam, C., & Beamish, P. (2022). The impact of initial public offerings on SMEs' foreign investment decisions. *Journal of International Business Studies*, 53, 879–901. [A+,FT50]
DOI: unassigned; accepted for publication on Nov 15, 2021
DOI and volume assigned 2023-GS
Apaydin, M., Jiang, G., Demirbag, M., & Jamali, D. (2021). The importance of corporate social responsibility strategic fit and times of economic hardship. *British Journal of Management*, 32 (2), 399-415. [A]
2022 Update; Volume Assigned

Lupton, N., Jiang, G., Escobar, L., & Jimenez, A. (2020). National income inequality and international business expansion. *Business and Society*, 59 (8), 1630-1666. [A]

Forthcoming. First Published Online December 7, 2018

Published in 2020

Jiang, G., Jung, J., & Makino, S. (2020). Parent firm corporate social responsibility and overseas subsidiary performance: A signaling perspective. *Journal of World Business*, 55 (6), 101-141. [A+]

Jiang, G., Holburn, G., & Beamish, P. (2020). Repeat market entries in the internationalization process: The impact of investment motives and corporate capabilities. *Global Strategy Journal*, 10 (2), 335-360. [A]

Early View Online Version of Record before inclusion in an issue

Forthcoming. Early View First published: 17 January 2018

Published May 2020

Jiménez, A., Jiang, G., Gammelgaard, J., & Petersen, B. (2019). Within-country religious diversity and performance of private participation infrastructure projects. *Journal of Business Research*, 95, 13-25. [A]

Jiang, G., & Holburn, G. (2018). Organizational performance feedback effects and international expansion. *Journal of Business Research*, 90, 48-58. [A]

Jiang, G. (2017). Corruption and private participation projects in Central and Eastern Europe. *Management International Review*, 57 (5), 775-792. [A]

Jiang, G., Holburn, G., & Beamish, P. (2016). The spatial structure of foreign subsidiaries and MNE expansion strategy. *Journal of World Business*, 51 (3), 438-450. [A+]

Bansal, T., Jiang, G. F., & Jung, J. (2015). Managing responsibly in tough economic times: Strategic and tactical CSR during the 2008-2009 global recession. *Long Range Planning*, 48 (2), 69-79. [A]

Featured in *Business + Strategy* at <http://www.strategy-business.com/blog/The-Subtleties-of-CSR-in-Hard-Times>

Jiang, G. F., Holburn, G., & Beamish, P. (2014). The impact of vicarious experience on foreign location strategy. *Journal of International Management*, 20 (3), 345-358. [A]

Fang, Y., Jiang, G. F., Makino, S., & Beamish, P. (2010). Multinational firm knowledge, use of expatriates, and foreign subsidiary performance. *Journal of Management Studies*, 47 (1), 27-54. [A+,FT50]

Articles in Refereed Conference Proceedings

Full Paper

Jung, J., Shin, D.J., Jiang, G., & Bu, M. (2023). I won't go: An interactive perspective to the air pollution effect on expatriate assignments. *Academy of International Business Conference*.

- Shortlisted for the Aalto University That's interesting! Award

Jung, J., Shin, D., Jiang, G., & Bu, M. (2023). Air pollution effect on expatriate assignments: An interactive perspective on MNEs and expatriates. *Academy of Management Conference*.

Jiang, G., & Sartor, M. (2019). Does corporate self-regulation matter? An analysis of corporate anti-corruption policy and foreign investment strategy. *Academy of International Business Conference*.

Copenhagen

Jiang, G., & Sartor, M. (2019). Corporate anti-corruption policy and MNE location strategy: The contingent role of investment motive. *Academy of Management Conference*.

Boston, MA

Jiang, G., & Sartor, M. (2019). The impact of multinational enterprise corporate anti-corruption policy on location strategy: The contingent role of investment motive. *European International Business Academy Conference*.

Leeds, UK.

Jiang, G., Jung, J., & Makino, S. (2018). The impact of parent firm CSR on foreign subsidiary performance: A signaling approach. *Academy of Management (AOM)*.

Chicago, IL.

Yang, Y., & Jiang, G. (2017). Work-life programs, demographic composition, and organizational outcomes. *Academy of Management (AOM)*.

Atlanta, GA

Lupton, N., Jiang, G., & Escobar, L. (2017). Income inequality and multinational enterprise expansion strategy. *Academy of Management (AOM)*.

Atlanta, GA

Jiang, G. F., Holburn, G., & Beamish, P. (2015). Path dependency and MNE location choice: The impact of investment intent and firm capabilities. *Academy of Management (AOM)*.

Vancouver, British Columbia.

- Jiang, G. F., Holburn, G., & Beamish, P. (2013). Investment objectives, firm capabilities and foreign location strategy. *Administrative Sciences Association of Canada (ASAC)*.
Calgary, Alberta.
- Jung, J., & Jiang, G. F. (2013). Economic recession, performance prospect and corporate social investment. *Academy of Management (AOM)*.
Orlando, Florida.
- Jiang, G. F., Holburn, G., & Beamish, P. (2013). Subsidiary spacial structure and MNE expansion strategy. *Academy of Management (AOM)*.
Orlando, Florida.
- Jiang, G. F., & Holburn, G. (2012). The evolution of MNE networks: The effects of prior exits and regional strategies. *Administrative Sciences Association of Canada (ASAC)*.
St. John's, Newfoundland.
- Jung, J., & Jiang, G. F. (2012). Corporate social responsibility in economic recession: An analysis of performance prospect perspective. *Administrative Sciences Association of Canada (ASAC)*.
St. John's, Newfoundland.
- Jiang, G. F., & Holburn, G. (2010). Is foreign investment for outperformers or underperformers? The international expansion of Japanese Machinery firms, 1986-2002. *Academy of Management (AOM)*.
Montreal, Quebec.
Best Paper Proceedings

Chapters in Edited Books

- Jiang, G., & Nguyen, T. (2024). A Tale of Two Markets: Nippon Steel's Retreat from China and its Acquisition of U.S. Steel. *Nikkei BizRuptors*. Nikkei BizRuptors. [Status: Published]
- Jiang, G., & Sartor, M. (2021). Corporate anti-corruption policy, investment motives, and foreign location choice. In Emerald Publishing Limited (Ed.), *Progress in International Business Research* (pp. 173-192). Emerald Publishing. [Status: Published]
- Jiang, G., Dueck, L., & Angulo, J. (2020). UBits: Feed Your Skills (A) and (B). *Ivey Publishing*. Ivey Publishing. [Status: Published]
Description: (9B20M200 and 9B20M201) and teaching notes (8B20M200)
- Dueck, L., & Jiang, G. (2019). MoviePass: A Netflix for Moviegoers?. *Ivey Publishing*. London, Ontario: Ivey Publishing. [Status: Published]
Description: Product Number: 9B19M137
- Lupton, N., Jiang, G., & Escobar, L. (2017). National income inequality, Society, and multinational enterprises. In Presenza, A. & Sheehan, L (Eds.), *Geopolitics and Strategic Management in the Global Economy* (pp. 219-241). IGI Global. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Scholarly Publications

- 2015: Jiang, G., *Managing responsibly in tough economic times: Strategic and tactical CSR during the 2008-2009 global recession*. Featured in Business+Strategy: Bansal, T., Jiang G., & Jung, J. (2015). "Managing responsibly in tough economic times: Strategic and tactical CSR during the 2008-2009 global recession." Long Range Planning. 48(2): 69-79.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

- Jiang, G. (2024). *Old Hands and New Blood: The Effects of Incumbent and Newly Appointed Female Directors on Firm Internationalization*. Annual Meeting of the Association of Japanese Business Studies, Seoul, Unknown.
- Jiang, G., Hyang, Y., & Makino, S. (2023). *Better governance or greater legitimacy? Examining the impact of transnational pressures on female board appointments*. Annual Meeting of the Southern Management Association, St. Pete Beach, Florida.
- Lehmberg, D. & Jiang, G. (2021). *The characteristics of firms employing foreign managers in Japan*. Annual Meeting of the Association of Japanese Business Studies, Virtual, Virtual.
- Jiang, G. & Sartor, M. (2019). *Does corporate self-regulation matter? An analysis of corporate anti-corruption policy and foreign investment strategy*. Academy of International Business, Copenhagen, Denmark.
- Jiang, G. & Sartor, M. (2019). *The impact of multinational enterprise corporate anti-corruption policy on location strategy: The contingent role of investment motive*. European International Business Academy, Leeds, United Kingdom.
- Jiang, G., Jung, J., & Makino, S. (2018). *The impact of parent firm CSR on foreign subsidiary performance: A signaling approach*. Academy of Management conference, Chicago, Illinois.
- Jiang, G., Jung, J., & Makino, S. (2018). *Corporate social responsibility at home and financial performance abroad*. Academy of International Business, Minneapolis, Minnesota.
- Jiang, G., Holburn, G., & Beamish, P. (2014). *Path dependency and MNE location strategy: The impact of investment objectives and firm capabilities*. Academy of International Business (AIB) Annual Meeting, Vancouver, Canada-British Columbia.

Other Presentations

Invited Lecture

2018: Sun Yat-Sen University, Guangzhou, China. The use of simulations in business education: A personal reflection.

2015: Faculty of Management, University of Lethbridge, Lethbridge, Canada-Alberta. Is foreign investment for outperformers or underperformers? The international expansion of Japanese machinery firms

2012: School of Business Administration, University of Vermont, Burlington, Vermont. "Organizational performance and risk-taking behavior in international expansion strategy"

2010: Faculty of Economics and Business, University of Groningen, Groningen, Netherlands. Is foreign investment for outperformers or underperformers? The international expansion of Japanese machinery firms 1986-2002."

2010: Bloch School of Management, University of Missouri, Kansas City, Kansas. "Is foreign investment for outperformers or underperformers? The international expansion of Japanese machinery firms 1986-2002."

2010: School of Business Administration, University of Vermont, Burlington, Vermont. "Is foreign investment for outperformers or underperformers? The international expansion of Japanese machinery firms 1986-2002."

Presentation

2019: HEC Montreal, Montreal, Canada-Quebec. "Corporate anti-corruption policy and MNE location strategy: The contingent role of investment motive." HEC Montreal, 2019.

2016: Sprott School of Business, Ottawa, Canada-Ontario. "The spatial structure of foreign subsidiaries and MNE expansion strategy"

2014: Rowe School of Business, Dalhousie University, Halifax, Canada-Nova Scotia. Investment objectives, firm capabilities and foreign location strategy

2014: Faculty of Management, Dalhousie University, Halifax, Canada-Nova Scotia. "Path dependency and MNE location strategy: The impact of investment objectives and firm capabilities"

Contract or Other Research

Research Grants and Awards

Grants

2025 [Year 4 of 4]: Jiang, G. Insight Grant (\$23,058.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2024 [Year 3 of 4]: Jiang, G. Insight Grant (\$23,058.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2024 [Year 3 of 3]: Jiang, G. Insight Development Grant (\$17,416.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024: Jiang, G. Research Achievement Award (\$15,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2023 [Year 2 of 4]: Jiang, G. Insight Grant (\$23,058.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 2 of 3]: Jiang, G. Insight Development Grant (\$17,416.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 5 of 5]: Jiang, G. Insight Grant (\$12,291.00 of a total grant amount of \$61,455.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 4]: Jiang, G. Insight Grant (\$23,058.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 1 of 3]: Jiang, G. Insight Development Grant (\$17,416.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 4 of 5]: Jiang, G. Insight Grant (\$12,291.00 of a total grant amount of \$61,455.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020 [Year 3 of 5]: Jiang, G. Insight Grant (\$12,291.00 of a total grant amount of \$61,455.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019 [Year 2 of 2]: Jiang, G. Insight Development Grant (\$22,900.00 Not Funded of a total grant amount of \$22,900.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2019 [Year 2 of 5]: Jiang, G. Insight Grant (\$12,291.00 of a total grant amount of \$61,455.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 1 of 2]: Jiang, G. Insight Development Grant (\$22,900.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2018 [Year 1 of 4]: Jiang, G. Insight Grant (\$12,291.00 of a total grant amount of \$61,455.00), Principal Investigator, GOV-Social Sciences and

Humanities Research Council (SSHRC). [Status: Funded]

2018: Jiang, G. Sabbatical Research Grant (\$9,500.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2017: Jiang, G. Dalhousie University - Grant (\$1,000.00), Principal Investigator, Dalhousie University. [Status: Funded]

2017: Jiang, G. Start-up Funds (\$10,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2017: Jiang, G. Start-up Funds (\$10,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board Member: PRJ Editorial Review Board

2022 – 2024: Journal of International Management.

2014 – 2024: Canadian Journal of Administrative Science.

2016 – 2022: Journal of International Management.

Chair: Conference / Track / Program

2012 – 2013: Administrative Sciences Association of Canada (ASAC). Divisional Chair, International Business Division

2011 – 2012: Administrative Sciences Association of Canada (ASAC). Program Chair, International Business Division

Invited Lecture

2018: Sun Yat-Sen University, Guangzhou, China. The use of simulations in business education: A personal reflection.

2015: Faculty of Management, University of Lethbridge, Lethbridge, Canada-Alberta. Is foreign investment for outperformers or underperformers? The international expansion of Japanese machinery firms

2012: School of Business Administration, University of Vermont, Burlington, Vermont. "Organizational performance and risk-taking behavior in international expansion strategy"

2010: Faculty of Economics and Business, University of Groningen, Groningen, Netherlands. Is foreign investment for outperformers or underperformers? The international expansion of Japanese machinery firms 1986-2002."

2010: Bloch School of Management, University of Missouri, Kansas City, Kansas. "Is foreign investment for outperformers or underperformers? The international expansion of Japanese machinery firms 1986-2002."

2010: School of Business Administration, University of Vermont, Burlington, Vermont. "Is foreign investment for outperformers or underperformers? The international expansion of Japanese machinery firms 1986-2002."

Reviewer: Conference Paper

2010 – 2011: Administrative Sciences Association of Canada (ASAC). Academic Reviewer, International Business Division

Scholarly Work in Progress

Papers Under Review

Jiang, G., Yang, Y., & Makino, S. (2024). "Pressures from afar, and far from pressured: Examining the impact of foreign institutional ownership and host-country board gender quota laws on female board appointments.," Initial submission.

Jiang, G., Ragozzino, R., & Reuer, J. (2024). "International corporate development activities and information disclosures in earnings calls," Initial submission.

Apaydin, M., Jiang, G., & Jamali, D. (2017). "Should corporate social responsibility focus be industry specific?," Initial submission to *Business and Society*.

Lupton, N., Jiang, G., & Escobar, L. (2017). "Income inequality and multinational enterprise expansion strategy," Initial submission to *Management International Review*.

Jimenez, A., Jiang, G., Gammerlgaard, J., & Petersen, B. (2017). "Within-country religious diversity and the performance of private infrastructure project," 1st revise and resubmit to *Journal of Business Research*.

Jiang, G. & Holburn, G. (2017). "Organizational performance feedback effects and international expansion," 1st revise and resubmit to *Journal of Business Research*.

Working Papers

Jiang, G. & Yang, Y. (2018). "Work-life programs, demographic composition, and organizational outcomes."

Jiang, G., Jung, J., & Makino, S. (2018). "The impact of parent firm CSR on foreign subsidiary performance: A signaling approach."

Jiang, G. & Apaydin, M. (2018). "CSR strategic fit and the times of economic hardship."

Jiang, G. & Sartor, M. (2018). "Does corporate self-regulation matter? An analysis of corporate anti-corruption policy and foreign investment strategy."

Jiang, G., Martins, H., & Motta, V. (2018). "Corporate governance and firm internationalization strategy: An analysis of the role of managerial entrenchment."

Jiang, G., Jung, J., & Makino, S. (2017). "Home-country corporate social performance and foreign subsidiary performance: A signaling approach."

Description: Working Paper

Jiang, G. & Yang, Y. (2017). "Work-life programs, demographic composition, and organizational outcomes."

Description: Working Paper

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	STGY5903	Strategic Concepts	0.5	40	Shanghai	100%
2024/Winter	IBUS5701	International Business	0.25	232	Main	100%
2024/Winter	STGY5903	Strategic Concepts	0.5	279	Main	100%
2023/Fall	STGY5903	Strategic Concepts	0.5	156	Main	100%
2023/Fall	STGY5903	Strategic Concepts	0.5	13	Main	100%
2023/Fall	STGY5903	Strategic Concepts	0.5	23	Main	100%
2023/Fall	IBUS5701	International Business	0.25	172	Main	100%
2023/Summer	STGY5903	Strategic Concepts	0.5	175	Main	100%
2023/Summer	STGY5903	Strategic Concepts	0.5	24	Shanghai	100%
2023/Summer	IBUS5701	International Business	0.25	106	Main	100%
2023/Winter	IBUS5701	International Business	0.25	48	Main	100%
2023/Winter	STGY5903	Strategic Concepts	0.5	79	Main	100%
2022/Fall	IBUS5701	International Business	0.25	10	Main	100%
2022/Fall	STGY5903	Strategic Concepts	0.5	18	Main	100%
2022/Fall	STGY5903	Strategic Concepts	0.5	69	Main	100%
2022/Fall	STGY5903	Strategic Concepts	0.5	18	Main	100%
2021/Fall	STGY5903	Strategic Concepts	0.5	22	Main	100%
2021/Fall	STGY5903	Strategic Concepts	0.5	38	Shanghai	100%
2021/Fall	STGY5903	Strategic Concepts	0.5	33	Main	100%
2021/Fall	STGY5903	Strategic Concepts	0.5	29	Main	100%
2021/Winter	STGY5903	Strategic Concepts	0.5	13	Main	100%
2021/Winter	BUSI6700	Seminar in International Business I: International Markets and Strategy	0.16	1	Main	100%
2021/Winter	BUSI5780	Seminar in International Business I: International Markets and Strategy	0.34	2	Main	100%
2020/Fall	STGY5903	Strategic Concepts	0.5	34	Shanghai	100%
2020/Fall	STGY5903	Strategic Concepts	0.5	21	Main	100%
2020/Fall	STGY5903	Strategic Concepts	0.5	24	Main	100%
2020/Winter	STGY5903	Strategic Concepts	0.5	28	Shanghai	100%
2019/Fall	STGY5903	Strategic Concepts	0.5	29	Main	100%
2019/Fall	STGY5903	Strategic Concepts	0.5	29	Main	100%
2019/Fall	STGY5903	Strategic Concepts	0.5	24	Main	100%
2019/Fall	STGY5903	Strategic Concepts	0.5	40	Main	100%
2019/Fall	BUSI4709	Strategic Management International Business	0.5	30	Main	100%

2019/Summer	IBUS5721	Regional & Global Business Strategy	0.25	15	Bogota	100%
2019/Summer	IBUS5712	Business & Government In Emerging Economies	0.25	17	Bogota	100%
2019/Winter	BUSI4709	Strategic Management International Business	0.5	29	Main	100%
2018/Fall	STGY5903	Strategic Concepts	0.5	43	Shanghai	100%
2018/Fall	STGY5903	Strategic Concepts	0.5	35	Main	100%
2018/Fall	STGY5903	Strategic Concepts	0.5	21	Main	100%
2018/Fall	STGY5903	Strategic Concepts	0.5	21	Main	100%
2018/Fall	BUSI4709	Strategic Management International Business	0.5	20	Main	100%
2018/Summer	IBUS5701	International Business	0.25	17	Bogota	100%
2018/Winter	IBUS5712	Business & Government In Emerging Economies	0.25	28	Bogota	100%
2018/Winter	BUSI4709	Strategic Management International Business	0.36	32	Main	71%
2018/Winter	BUSI4709	Strategic Management International Business	0.14	13	Main	29%
2018/Winter	BUSI2701	Fundamentals of International Business	0.5	29	Main	100%
2017/Summer	IBUS5713	Doing Business in the U.S.	0.25	41	Shanghai	100%
2017/Summer	IBUS5712	Business & Government In Emerging Economies	0.25	8	Bogota	100%
2017/Summer	IBUS5712	Business & Government In Emerging Economies	0.25	41	Shanghai	100%
2017/Winter	BUSI4709	Strategic Management International Business	0.5	54	Main	100%
2016/Fall	BUSI4708	International Expansion and Operations	0.5	43	Main	100%
2016/Fall	BUSI4709	Strategic Management International Business	0.5	25	Main	100%

Service to the institution (Academic)

External Committees

Thesis Assignments

Masters Thesis Committees:

2023-2024: Kaitlin Aarma

Thesis Assignments

PhD. Thesis Committees:

2016-2017: Limin Fu, The University of Adelaide

Thesis Assignments

PhD. Thesis Committees:

2023-2024: Steven Guo

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2018-2019: Hiring Committee - International Business Faculty

H. OTHER

Selected Media Appearances: Online

2020 - Managing CSR in the Global Context

Credentials

Professional Development

Professional Seminars / Workshops

2014: Using Cases in IB Teaching Workshop, Academy of International Business conference.

2012: Case Teaching Workshop, Rowe School of Business.

2010: Recording Teaching Accomplishment Workshop, Dalhousie University.

Skills

Languages

English (proficient: read/write/speak) Chinese (native speaker)

Curriculum Vitae - Sprott School of Business

Emily Jones Joannis, MBA
Assistant Professor, Teaching Stream - Preliminary - Tenure Track
Sprott School of Business (To Be Determined/Unassigned)
Telephone:
Email: EmilyJonesJoannis@cunet.carleton.ca
AACSB Qualification: Instructional Practitioner (IP) , Participation: Participating
Orcid: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Master of Business Administration. Carleton University.
Doctor of Philosophy. Carleton University.
Title: *Began PhD, Management studies full time in September 2020*
Bachelor of Computer Science. Carleton University.

B. EMPLOYMENT

Academic Appointments

Instructor II, Carleton University (July, 2021 - Present), Ottawa, Canada-Ontario. Project-based Experiential Learning Instructor (Faculty): Initially responsible for overseeing the Sprott Student Consulting Group, with a focus on building non-profit partnerships between the Sprott School of Business and various NGOs in the community. During Summer 2021 responsible for organizing and delivering the inaugural Real Talk conference with Sprott students and community volunteers. Transitioned to Director of Project Delivery at the Innovation Hub, overseeing student teams, Winter 2021 onwards as they designed and delivered diverse projects for paying and pro-bono customers. As of Dec 2023, spearheading the establishment of the Sprott Social Impact Hub, a new initiative created to provide students with project-based experiential learning experiences with non-profit and charity partners.

Part-time Professor, Algonquin College (December, 2015 - August, 2018), Ottawa, Canada-Ontario. For the Algonquin School of Business, instructed business administration students the course "MGT2328: Introduction to Management Fundamentals", which is focused on teaching the skills needed to organize, plan and lead people, teams and projects to successfully achieve organizational goals, within the context of CSR, ethics, and sustainability. Taught over 200 students over six semesters (W16, S16, W17, S17, W18, S18);

Volunteer Web Manager & Technical Support, Il Nodo Onlus Internazionale (November, 2008 - June, 2011), Milan, Italy. Il Nodo is an Italian-Cambodian NGO based in Milan, which leads a variety of projects focused on sustainable development in Cambodia. They do this through two main initiatives - programs to meet basic needs (clean water, health training etc) and also design-centric educational programs to train youth to become highly-skilled artisans, giving them the means support to themselves.

- Supporting, training and assisting members of Il Nodo Onlus with various technology-related activities (i.e. layouts for printing and web, video editing, promoting activities and fund-raising through social media etc.).
- Updating and maintaining the website content and CMS.
- Assisting with the editing and publication of a graphic novel about water safety for Cambodian children ("The Veil of the Fish Queen"), and regularly assisting with the editing and publication of the annual report.
- Translation (Italian-English) of other content and documents for web and print

Other Employment

Co-founder and CEO, Connected Canadians (January, 2018 - Present), Ottawa, Canada-Ontario. Connected Canadians is a non-profit / volunteer-based organization with a mandate to connect seniors and older adults with technology training and support. Because we believe digital literacy is a human right, we provide all of our services free of charge. Current partnerships include Perley-Rideau Veteran's Health Centre, Ottawa Community Housing, the Westwood Revera and Bruyère, and supporters to date have included Facebook, Qlik, Lyft, Adobe, Sephora, i-Sight Software and Ottawa Community Foundation. In April 2019, Connected Canadians won the Leadership in Volunteer Diversity Award (Volunteer Ottawa). As CEO and Co-founder I created our brand, established our vision and mission, set direction for our educational programs and strategic partnerships and am responsible for building and championing our organizational culture, including recruitment and screening and management of all volunteers and developing and implementing our onboarding program

Delivery Manager, i-Sight by Customer Expressions (February, 2018 - February, 2020), Ottawa, Canada-Ontario. i-Sight creates case management software that is relied upon by hundreds of leading national and multinational corporations and government agencies in all sectors to help them conduct better investigations (navigating cases of fraud, harassment and more). As a Delivery Manager at i-Sight, I was responsible for managing a team of business analysts, software developers and quality assurance specialists and ensuring successful delivery of the agile and waterfall software projects we work on, as well as overseeing and managing all client relationships (usually 9-12 client projects at a time, each with 4-15+ stakeholders). Selected and

implemented the IT and project delivery tools being used by my organization, managed all resourcing and capacity planning. Past/current clients include: all campuses of the University of California, select United Nations agencies, US Center for Safe Sport, US Olympic and Paralympic Committee, Orange County Public Schools, EA Sports, LA Unified School District, LA Metro, New York City Housing Authority

Program Manager, Knowledge Services, Youi.tv (October, 2017 - January, 2018), Ottawa, Canada-Ontario. As part of the Knowledge Services team, oversaw strategic knowledge-focused programs and projects that impacted all employees and clients of You.i. Executed on a strategic roadmap that included the design and development of the customer support portal, internal and external training programs, and the content creation/documentation process. As of January 2018, You.i changed strategic direction as a company, and the Knowledge Services team was restructured to remove all management roles; letter of recommendation available on request.

Senior Project Manager, SMITH (January, 2017 - October, 2017), Gatineau, Canada-Quebec. Reporting to the VP of Delivery, managing an agile technology team of 40+ developers, quality assurance specialists, team leads and user experience architects working on the digital commerce platform of one of the largest fast food retailers in the world. Between January 2017 and June 2017 hired, onboarded, ramped up and mentored more than 30 new hires, setting up 5 new scrum teams along with all project reporting, workflow and communication tools and work delivery processes. Direct manager of all agile scrum masters, as well as technical architects on the team (8 direct reports, 33 indirect reports). Awarded the Silversmith Award for Delivery Excellence in May 2017. SMITH is a leading experiential commerce agency that specializes in helping brands modernize the buying and selling experience. SMITH's clients include Microsoft, AT&T, Best Buy, Cisco, Amtrak, Top Golf, CDK Global, Tejuri and Xerox.

Project Lead, Innovation 150, Actua (November, 2016 - March, 2016), Ottawa, Canada-Ontario. Actua is a non-profit organization which provides life-changing science and technology experiences, inspiring all youth to achieve their potential and fulfill their critical role in the world. For Canada 150, Actua created a Maker Mobile - a travelling maker space full of exciting technology like 3D printers, programmable circuit boards, and a laser cutter, which traveled across Canada starting November 2016, reaching youth in over 80 communities. As Project Lead I oversaw all aspects of the Innovation150 project on behalf of Actua, reporting to the CEO. Responsibilities include oversight of:

- Recruitment, hiring and training and management of the Maker Mobile staff
- The content creation planning process: ensuring that all Maker Mobile workshops are created on time and on budget, and in accordance with sponsor requirements
- The design and creation of the Maker Mobile brand and user experience, including the digital/web strategy and physical marketing collateral
- The design and custom creation of the 15' Maker Mobile truck, including the procurement process and work management for all 7 external vendors involved
- The tour planning process: ensuring that the community planning team has all required information and is able to transmit subsequent route planning information as needed
- All required financial reporting as outlined by project sponsors

Director of Services Delivery, Napkyn (July, 2015 - November, 2015), Ottawa, Canada-Ontario.

- As a member of the Napkyn Leadership Team, responsible for managing the entire delivery team of 12 analysts and developers, and overseeing program and project delivery for all consulting services. During this period I brought in an entirely new set of tools and work management processes to help the team run more efficiently
- Initial set-up and configuration of all work management and agile work planning processes and related tools for comprehensive project management and workflow between internal and external stakeholders
- Responsible for overseeing and managing resourcing, capacity and forecasting for the entire company, while transitioning the team into the use of all new tools.
- Responsible for managing the project management team directly and acting as project manager on specific high profile projects.

Director of Delivery/Senior Project Manager, Soshal (August, 2014 - June, 2015), Ottawa, Canada-Ontario.

- As a member of the Soshal Leadership Team, responsible for managing the Digital and UX Strategy Team, Web Development Team, and QA practice areas, and overseeing overall project delivery, while also overseeing resource and capacity planning
- Responsible for managing and delivering multiple higher-education websites, including Michener.ca, yestoyork.ca, continue.yorku.ca (School of Continuing Studies), and Algonquin ITS Help Centre.
- - Creating deliverable schedules and adhering to them; mentoring other Project Managers as required.
 - Responsible for creating/updating individual Performance Management Plans for all direct reports (web development team, project management team, business analysis and content strategy teams) and creating and managing a more robust hiring process for new developers
 - Acting as a liaison between the production team, the accounts team, leadership team, and external clients to ensure that internal and external delivery deadlines and milestones, reporting requirements, and client expectations are met.
 - Responsible for introducing new, more formalized requirements gathering and Quality Assurance/Release processes at Soshal.
 - Responsible for spearheading automation initiatives, for tasks such as capacity reporting and timesheet and project progress tracking.
 - Managing projects as required: creating deliverable schedules and adhering to them
 - Acting as a liaison between the production team, the accounts team, upper management and external clients to ensure that internal and external delivery deadlines and milestones, reporting requirements, and client expectations are met

Digital Producer, PMO Group, Fuel Youth Engagement (August, 2013 - August, 2014), Ottawa, Canada-Ontario.

- Responsible for managing and delivering multiple large scale interactive online websites and online games, for companies such as McDonald's

Europe (www.happystudio.com) and Mattel (www.barbie.com), in a hybrid waterfall/agile environment.

- Managing internal production team efforts from both a UI perspective (graphic designers, illustrators, animators, UI designers and copywriters) and a development perspective (game designers, software developers, and the quality assurance team) to successfully culminate in the release of a high quality product.
- Coordinating localization efforts with translators and 3rdparty reviewers.
- Acting as a liaison between the production team, the accounts team, upper management, and external clients to ensure that internal and external delivery deadlines and milestones, reporting requirements, and client expectations are met.
- Creating deliverable schedules and budgets and adhering to them, while reporting any discrepancies to upper management and the client as necessary; Monitoring risks, identifying scope creep, and helping to create Change Request documents as needed.

Director of Product Management, myGlobalU (January, 2013 - August, 2013), Ottawa, Canada-Ontario. MyGlobalU is a social media platform and CRM for higher education providers, to help manage international information such as exchange and study abroad agreements, research projects, and international student recruitment. Funding for this role provided by IRAP and flowed through an organization associated with Carleton International.

- Evaluating the base product from a functionality and usability perspective, and subsequently establishing a work plan for development and design teams.
- Setting up and monitoring a quality assurance system in order to improve efficiency and quality within the programming and graphic design teams.
- Writing user requirements for new features / in order to improve existing features, based on user input and other feedback.
- Developing marketing and sales campaigns to target key sectors within the industry.
- Writing new documentation, and revising existing documentation for client training

Program Manager, Assistant to the Business and Management Faculty Representative, Carleton University/Shad Valley International (June, 2010 - September, 2012), Ottawa, Canada-Ontario. Shad Valley is an international non-profit summer program held yearly across Canada that focuses on developing the Science, Business and Technology skills of exceptional high school students.

Program Manager (2012 Program), responsibilities included: Managing a team of 14 staff members, who in turn led the 56 highly gifted program participants throughout the course of the program. Developing a financial plan / budget based on previous years' data to use for the current year. Assisting the Program Director in organizing and administering the program, and arranging for necessary resources as needed, including food, accommodation, scheduling, etc. Planning and developing an appropriate staff training program. • Maintaining financial records, preparing reports, and making payments to staff and outside parties as required. • Offering/assisting with various workshops/lectures, while living in residence with participants and staff.

Assistant to the Business and Management Faculty Representative (2010 & 2011 Programs), responsibilities included: • Mentoring 5 teams of 10-12 students in the conception and authoring of viable business plans for their design projects, throughout the design, planning and implementation phases. • Offering/assisting with various workshops/lectures, while living in residence with participants and staff • Assisting with technical setups for presentations etc, and website administration, other administrative duties as required.

ICT Teacher/Systems Admin, Bilingual School of Monza (August, 2010 - June, 2011), Monza, Italy. The Bilingual School of Monza is a bilingual International Baccalaureate private school, composed of 2 campuses (primary and middle years). Duties as teacher and system administrator:

- Teaching information & communication technology classes, kindergarten to grade 6, and documenting and reporting progress for the school, students and parents
- Maintaining the school's website (English and Italian versions, primary and middle years)
- Supporting staff and students with any technical issues that arose within the school network/computers/software
- Publishing the school's bilingual newsletter
- Managing the school's AV inventory and AV sign-out system

Software Engineer - Product Development & QA,, Mobango Ltd. (March, 2008 - October, 2008), Milan, Italy.

- Developing practical documented test cases from existing specifications, for the use of automated and manual testing of outsourced QA teams based in South-East Asia.
- Developing automated tests for in-house quality assurance using ruby/watir; ensuring consistent software quality.

Release Engineer & Deployment Manager,, Magmic Games Inc. (May, 2005 - February, 2008), Ottawa, Canada-Ontario.

- Interfaced with the Development, Marketing, Porting, and QA teams in order to release final game packages of the highest quality to the customer, for Blackberries and Java-enabled mobile phones, throughout all phases of the SDLC.
- Collected and maintained game-related marketing collateral for customers and retailers.
- Responsible for acquiring new devices and managing the existing inventory of wireless devices for use by the development and porting teams.

Software Engineer / Web Developer, Formark Consulting Ltd. (February, 2004 - May, 2005), Ottawa, Canada-Ontario.

- As a member of the software engineering team, responsible for updating and maintaining VB/ASP code of Formark applications such as Formark Project and Formark Courier.
- Also responsible for maintaining and updating ASP applications such as the ONR document management application based on Opentext's product Livelink.

- As of January/February '05 began scripting for the Quality Assurance team using Rational Robot.

Junior Portal Developer - IT Services, Monash University (March, 2001 - November, 2001), Melbourne, Australia.

- Member of the Flexible Learning and Teaching Web Development team
- Responsible for updating and maintaining existing perl/html/SQL code and creating new user features for the my.monash portal

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Paper Presentations (Refereed)		1		1
Totals		1		1

Refereed Scholarly Publications

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Nardon, L. & Jones Joannis, E. (2021). *Retraining Hospitality Workers for a Post-Pandemic Career*. Administrative Sciences Association of Canada, Virtual, Virtual.

Contract or Other Research

Other Professional Activities

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2021/Fall	BUSI1800	Introduction to Business	0.5	272	Main	100%
2021/Fall	BUSI1800	Introduction to Business	0.5	269	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Service to the Community

Other Community Service Activities

2011 – 2013: CKCU, Carleton's Radio Station, Volunteer radio show host at CKCU, Carleton's Radio Station (2011-2013), co-hosting a weekly radio show

2008 – 2011: Il Nodo Onlus, Volunteer for Il Nodo Onlus, an Italian-Cambodian NGO (2008-2011 in Milan, 2011-2014 remotely)

Curriculum Vitae - Sprott School of Business

Leanne Keddie, PhD
Associate Professor - Tenured,
Sprott School of Business (Accounting)
Telephone: 613-520-2600 x4003
Email: leanne.keddie@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-9635-6746>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Concordia University.

Title: • 4.03 GPA (cumulative) • 3MT finalist for Concordia University PhD category 2017 • Successfully defended thesis May 28, 2020, convoked November 19, 2020

Master of Business Administration. McMaster University.

Bachelor of Commerce. Mount Allison University.

Professional Certifications

Chartered Professional Accountant (CPA), 2009

B. EMPLOYMENT

Academic Appointments

Assistant Professor - Accounting, Sprott School of Business, Carleton University (2020 - Present), Ottawa, Canada-Ontario.

Visiting Professor, University of Cagliari (October, 2022 - October, 2022), Cagliari, Italy.

Lecturer, Concordia University (August, 2018 - May, 2019), Montreal, Canada-Quebec.

- Strategic Accounting Case Analysis
- Intermediate Financial Accounting

Sessional Lecturer, Concordia University (January, 2016 - April, 2017), Montreal, Canada-Quebec. Strategic Accounting Case Analysis

Sessional Lecturer, McMaster University (May, 2010 - April, 2012), Hamilton, Canada-Ontario.

- Management Accounting II
- Intermediate Financial Accounting I

Research Assistant, McMaster University (January, 2010 - March, 2010), Hamilton, Canada-Ontario. Assisted Dr. Toru Yoshikawa with preparation of a publication for the Conference Board of Canada regarding corporate governance.

Sessional Lecturer, Mohawk College (May, 2010 - July, 2010), Hamilton, Canada-Ontario. Business Finance I

Sessional Lecturer, University of Toronto (January, 2010 - April, 2010), Mississauga, Canada-Ontario. Management Accounting II

Other Employment

Research Assistant, Concordia University (August, 2018 - March, 2019), Montreal, Canada-Quebec. Providing research regarding diversity office initiatives in other Canadian universities for the Office of the Provost and Vice-President, Academic Affairs

Consultant, CPA Canada (September, 2012 - 2019), Toronto, Canada-Ontario.

- Developed numerous examination cases for the Performance Management Elective module of the new national CPA program
- Developed multiple choice questions for Core 2 and the Performance Management Elective modules of the new national CPA program
- Developed examination case for Day 3 of the CFE for the new CPA program Developed examination cases for the Core 2 module of the new national CPA program
- Developed task-based simulations (TBS) for the Performance Management elective (2013 & 2019)
- Marker for the August 2014 Case Exam
- Responsible for preparation of the first-year August 2013 case exam for the legacy CMA program

Research Assistant, University of Ottawa (November, 2016 - December, 2016), Ottawa, Canada-Ontario. Prepared literature review on corporate social responsibility and policy uncertainty

Research Assistant, Centre interuniversitaire de recherche en analyse des organisations (CIRANO) (May, 2015 - June, 2015), Montreal, Canada-Quebec. Assisted in collecting and summarizing material related to the state of entrepreneurship and growth in Quebec

Research Assistant, Concordia University (February, 2015 - August, 2015), Montreal, Canada-Quebec. Assisted in collecting and summarizing material related to a major on land oil spill and the governance issues surrounding this.

Research Assistant, Concordia University (May, 2013 - August, 2015), Montreal, Canada-Quebec.

- Assisted in critiquing and researching paper related to Balance Scorecards and weighting schemes
- Researched new CPA competency map relating to sustainability accounting

Research Assistant, Concordia University (May, 2013 - June, 2013), Montreal, Canada-Quebec. Assisted in preparation of president's opening remarks for Society for Teaching and learning in Higher Education Conference

Manager, Professional Programs, CMA Canada (April, 2010 - August, 2012), Mississauga, Canada-Ontario.

Senior Consultant, Business Valuations and Litigation Support, Pettinelli Mastroluisi Consulting (April, 2009 - April, 2010), Hamilton, Canada-Ontario.

Teaching Assistant, McMaster University (January, 2009 - April, 2009), Hamilton, Canada-Ontario.

Business Consultant, Enterprise Brant (September, 2008 - April, 2009), Brantford, Canada-Ontario.

Account Manager, Business Development, Business Development Bank of Canada (January, 2006 - September, 2008), Hamilton, Canada-Ontario.

Personal Banking Officer, Scotiabank (January, 2005 - December, 2005), Burlington, Canada-Ontario.

Commercial Account Manager, Pitney Bowes (March, 2004 - December, 2004), Toronto, Canada-Ontario.

Investment Representative, Edward Jones (June, 2003 - February, 2004), Halifax, Canada-Nova Scotia.

Business Owner, Manager, Blue Harbour Development Coporation (January, 2001 - May, 2003), Sackville, Canada-New Brunswick.

C. PROFESSIONAL HONOURS

2023: AACSB Influential Leaders Award, AACSB.

2021: John Dobson Enactus Fellow, Enactus.

2017: Doctoral Scholarship, Fonds de Recherche du Québec - Société et culture (FRQSC).

2017: Gender Summit Graduate Award, Concordia University.

2017: Bertram Scholar, Canadian Foundation for Governance Research.

2016: Scholarship, Hydro-Quebec.

2016: Doctoral Scholarship, Fonds de Recherche du Québec - Société et culture (FRQSC).

2016: Fellowship in Commerce and Administration, Noranda Inc..

2015: Doctoral Funding, John Molson School of Business.

2015: Scholarship, Foundation of Quebec Chartered Professional Accountants.

2015: Scholarship, Hydro-Quebec.

2015: Doctoral Scholarship, Fonds de Recherche du Québec - Société et culture (FRQSC).

2014: Doctoral Funding, John Molson School of Business.

2014: Research Center Scholarship, CGA-Canada.

2014: Fellowship in Commerce and Administration, Noranda Inc..

2014: Scholarship, Foundation of Quebec Chartered Professional Accountants.

2013: Research Center Scholarship, CGA-Canada.

2013: Fellowship in Commerce and Administration, Noranda Inc..

2012 – 2013: Doctoral Funding, John Molson School of Business.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		2		2
Articles-in-Progress (All)		15		15
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings			1	1
Paper Presentations (Refereed)		4		4
Research Report, Non-Refereed		2		2
Grants - Funded (both refereed and non-refereed)		10	1	11

Totals		33	2	35

Refereed Scholarly Publications

Articles in Refereed Journals

Keddie, L., & Magnan, M. (2023). Are ESG performance-based incentives a panacea or a smokescreen for excess compensation? *Sustainability Accounting, Management and Policy*, 14 (3), 591-634. [B]

Firoozi, M., & Keddie, L. (2022). Geographical Diversity Among Directors and Corporate Social Responsibility. *British Journal of Management*, 33 (2), 828-863. [A]

Published with DOI. Early View, Online Version of Record before inclusion in an issue

Volume assigned in 2022. Changed accordingly

Boulianne, E., & Keddie, L. (2018). Where is Sustainability within the Canadian CPA Program? *Advances in Environmental Accounting and Management*, 7, 71-112. [B]

Boulianne, E., Keddie, L., & Postaire, M. (2018). (Non) Coverage of Sustainability Within the French Professional Accounting Education Program. *Sustainability Accounting, Management and Policy*, 9 (3), 331-335. [B]

Chapters in Edited Books

Firoozi, M., & Keddie, L. (2021). Teaching and Learning Guide: Geographical Diversity Among Directors and Corporate Social Responsibility. *British Journal of Management*. Wiley and Sons. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Scholarly Publications

2017: Keddie, L., Article review of Christ, K. L., Burrit, R. & Varsei, M. (2016). *Towards environmental management accounting for trade-offs*.

Sustainability Accounting, Management and Policy Journal, 7 (3), 428-448. Social and Environmental Accountability Journal (SEAJ), 37 (3), 223-225

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Special Issue of a PRJ

2023: Sustainability Accounting, Management and Policy Journal (International). Lead guest editor along with Tessa Hebb, Kate Ruff and Isaac Otchere. SAMPJ. Special issue on the intersection between sustainability accounting and sustainable finance arising from Sustainable Accounting and Finance Conference held at Sprott. Closed December 20th, 2022. Anticipated publication of special issue Fall 2023. Update: While we had a number of submissions to the special issue, the majority were not of high enough quality, and we have cancelled this initiative. The papers that have been accepted will be published in the regular issue of the journal and have been transferred over as of Fall 2023.

2022: Sustainable Accounting and Finance Conference (National). Lead guest editor along with Tessa Hebb, Kate Ruff and Isaac Otchere. SAMPJ. Special issue on the intersection between sustainability accounting and sustainable finance arising from Sustainable Accounting and Finance Conference held at Sprott. Closed December 20th, 2022. Anticipated publication of special issue Fall 2023.

Presentations

Papers Presented at Conferences

Refereed

Keddie, L. (2023). *Directing executive bonuses to address the climate crisis: Is it effective?* International Congress on Social and Environmental Accounting Research, St Andrews, Scotland.

Keddie, L. (2023). *How can accountants enhance (or save) natural and cultural capital valuation? Engaging academics: a collaboration with CPA Canada and CCUNESCO*. International Congress on Social and Environmental Accounting Research, Toronto, Canada-Ontario.

Keddie, L. (2021). *Towards a taxonomy of CSR performance-based incentives*. European Management Accounting Network (EMAN) Centre for Social and Environmental Accounting Research (CSEAR) Global Conference, Virtual, Virtual.

Description: "Towards a taxonomy of CSR performance-based incentives". The 2021 European Management Accounting Network (EMAN) Centre for Social and Environmental Accounting Research (CSEAR) Global Conference: Accounting for sustainable development in the Anthropocene. University of Nantes, France (delivered via Zoom due to Covid-19). May 17th-19th, 2021.

Keddie, L. (2020). *Who is more powerful: the board or management? Exploring the relationship between CSR performance-based incentives and executive compensation*. Canadian Academic Accounting Association, Saskatoon, Canada-Saskatchewan.

Description: (delivered via Zoom due to Covid-19), June 5th, 2020

Keddie, L. (2018). *Succumbing to the pressure? What motivates firms to provide CSR performance-based incentives?* North American Congress on Social and Environmental Accounting Research, Toronto, Canada-Ontario.

Description: June 21-22

Keddie, L. (2018). *Succumbing to the pressure? What motivates firms to provide CSR performance-based incentives?" Rethinking Responsibility: Agents and Structures*. John Molson School of Business, Montreal, Canada-Quebec.

Description: Dec. 6 - 7, 2018

Keddie, L. (2017). *For greed or for good: what motivates firms to provide CSR incentives and how does corporate governance play a role?*

Accounting Ethics Symposium, Toronto, Canada-Ontario.

Keddie, L. (2016). *Where is Sustainability within the Canadian CPA Program?* Canadian Academic Association Annual Conference, St. John's, Canada-Newfoundland.

Keddie, L. (2014). *Trickling down: environmental performance indicators' journey through the organization*. Atelier de Recherche de l'Association de Contrôle de Gestion, Montreal, Canada-Quebec.

Keddie, L. (2014). *Trickling down: environmental performance indicators' journey through the organization*. North American Congress on Social and Environmental Accounting Research, Quebec City, Canada-Quebec.

Description: July 2-3

Non-Refereed

Keddie, L. (2018). *For greed or for good: what motivates firms to provide CSR incentives and how does corporate governance play a role?* Invited presentation at Groupe de recherche en finance responsable, École de gestion, Université de Sherbrooke, Sherbrooke, Canada-Quebec.

Other Presentations

Keynote Address

2023: The Role of Accounting in Sustainability and Circular Economy Symposium. "The role of accounting to help companies adapt towards a circular economy.". Keynote Address. Held by The CPA Ontario Centre for Public Policy and Innovation in Accounting.

2021: CPA Ontario Inaugural ESG Summit. Featured speaker on sustainability reporting (paid).

Presentation

2023: Asia - Pacific Sustainable Energy Center (APSEC), Virtual, Virtual. Leveraging incentives through sustainability accounting to move toward carbon neutrality. A presentation to the participants of the Workshop on Sustainable Cities put together by the Asia-Pacific Economic Cooperation (APEC) Sustainable Energy Center (APSEC).

2023: CCUNESCO. How can accountants enhance (or save) natural and cultural capital valuation? Engaging academics: a collaboration with CPA Canada and UNESCO. Knowledge Dissemination

2023: Cannexus, Ottawa, Canada-Ontario. The role of post-secondary institutions in developing skills needed for a net-zero economy

2022: CPA New Brunswick. CPA New Brunswick Fall CPD. An introduction to Sustainability Accounting and ESG. November 3rd, 2022.

2022: CAAA and International Sustainability Standards Board, Virtual, Virtual.

2022: University of Cagliari, Department of Economics and Business Sciences, Cagliari, Italy. "Directing executive bonuses to address the climate crisis: Is it effective? And an exploration of novel data in accounting research". A presentation to the faculty and students at the University of Cagliari, Department of Economics and Business Sciences. Cagliari, Italy. October 14th, 2022.

2021: Toulouse International Days. Toulouse International Days – invited workshop to students on January 13th & 14th, 2022. Title of presentation: "Sustainability accounting in North America: from reporting to incentivizing sustainability – a (critical) look at the current state of affairs".

2021: DFCG. Financium, Paris, France.

2021: CSEAR Webinar Series. "Who is more powerful: the board or management? Exploring the relationship between CSR performance-based incentives and executive compensation". CSEAR Webinar Series. Online. May 6th, 2021.

2020: Professional Accounting Research Group (PARG) Seminar, Sprott School of Business, Ottawa, Canada-Ontario. "Corporate Social Responsibility performance-based incentives: who is influencing their use and what effect do they have?," March 2, 2020.

2016: Research Fest, Concordia University, Montreal, Canada-Quebec. A Study in Equifinality: What Corporate Governance Bundles Underlie Sustainability Performance?

2016: Canadian Academic Accounting Association Annual Conference, St. John's, Canada-Newfoundland. A Study in Equifinality: What Corporate Governance Bundles Underlie Sustainability Performance?

Contract or Other Research

Research Grants and Awards

Grants

2024: Keddie, L. Research Achievement Award (\$15,000.00 Not Funded), Principal Investigator, PRI-Carleton University. [Status: Not Funded]

2024 [Year 3 of 3]: Keddie, L. Imagining Canada's Future Ideas Lab (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 2]: Keddie, L. Insight Development Grant (\$37,320.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 3]: Keddie, L. Imagining Canada's Future Ideas Lab (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 2]: Keddie, L. Imagining Canada's Future Ideas Lab, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 2]: Keddie, L. Insight Development Grant (\$37,320.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 2]: Keddie, L. Imagining Canada's Future Ideas Lab, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022: Keddie, L. Connection (\$25,000.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 3]: Keddie, L. Imagining Canada's Future Ideas Lab (\$78,015.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022: Keddie, L. Chartered Professional Accountants Ontario (\$375,000.00 Not Funded), Principal Investigator, Chartered Professional Accountants Ontario (CPA). [Status: Not Funded]

2021: Keddie, L. Start-up Funds (\$10,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Keddie, L. Grant (\$1,500.00), Principal Investigator, Enactus. [Status: Funded]

2021: Keddie, L. I-CUREUS (\$2,565.00), Principal Investigator, PRI-Carleton University. Towards a taxonomy of CSR performance-based incentives. [Status: Funded]

2020: Keddie, L. Start-up Funds (\$10,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2020: Canadian Academic Accounting Association.

Academic Conference: Moderator / Facilitator

2022: CPA Ontario's Environmental, Social & Governance (ESG) Conference. CPA Ontario's Environmental, Social & Governance (ESG) Conference. Panel moderator: A Roadmap to ESG Integration. November 1st, 2022

Academic Conference: Panelist

2023: Canadian Academic Accounting Association (CAAA). Thought Leaders Initiative & Activities: Sustainability for Accountants: A Moderated Panel Discussion on How to Bring Sustainability into the Classroom

Advisor

2021 – 2023: Accounting for Impact Network (Formerly Engaged Accounting Scholar Network). Engaged Accounting Scholar Network (possibly to be renamed Accounting For Impact), 2021.

- This group has received funding from CPA Ontario to develop training and initiatives to support more broad impact from accounting researchers
- Launched in 2022

Board Member: Advisory Board

2023: Accounting Forum.

2021 – 2023: Sustainability Accounting, Management and Policy Journal.

2020: CPA Canada.

- Selected for sustainability accounting expert sub-committee to determine the sustainability accounting competencies in this area to be included in the new CPA Competency Map, 2021-present
- Selected for Management-Decision-Making and Information Systems Expert Drafting Table to incorporate sustainability accounting, 2021-present
- Submitted response letter to CPA Canada on CM2.0 (revised competency map)

Board of Directors: Moderate Involvement

2022: CPA Canada Board of Directors Standards Review Process Sub-Committee. Project Lighthouse – brought onto to provide expertise on sustainability accounting and reporting to the CPA Canada Board of Directors to help them prepare their response to the Independent Review Committee on Standard Setting in Canada consultation paper

Board of Directors: Substantial Involvement

2021: Alterna Social Ventures Institute.

- Organized 4-part summer series with Daniela Papi-Thornton on igniting impact and impact gaps analysis for social entrepreneurs
- Organized Ottawa Social Value Fund (OSVF) info session to identify and launch the OSVF • Organized microfinance presentation by Susan Henry and Jean Barret of Alterna Savings to present on how to get financing for your social enterprise

- Collaborated with Harry Sharma of the Innovation Hub to bring 6-week pre-incubation certificate on mapping the system for social entrepreneurs
- Launched the Map the System competition for Carleton students • Launched social-entrepreneur-in-residence program in collaboration with Harry Sharma of the Innovation Hub
- Oversaw Julie Cho who conducted research on the landscape of Social Venture Institutes internationally to make best practices recommendations

Chair: Conference / Track / Program

2023: ASAC Conference. Chaired the management accounting session.

2022: CSEAR Congress. 33rd CSEAR Congress. Conference Session Chair

Keynote Address

2023: The Role of Accounting in Sustainability and Circular Economy Symposium. "The role of accounting to help companies adapt towards a circular economy.". Keynote Address. Held by The CPA Ontario Centre for Public Policy and Innovation in Accounting.

2021: CPA Ontario Inaugural ESG Summit. Featured speaker on sustainability reporting (paid).

Member: Committee/Task Force

2023: CSEAR Education Community.

2023: CSEAR France Conference, France, France. member of Scientific Committee

2023: Auditing and Assurance Standards Board. Auditing and Assurance Standards Board (AASB) and the International Auditing and Assurance Standards Board (IAASB) joint roundtable on proposed Canadian Standard on Sustainability Assurance (CSSA) 5000 and International Standard on Sustainability Assurance (ISSA) 5000 General Requirements for Sustainability Assurance Engagements

2023: Centre for Social and Environmental Accounting Research.

2022: Accounting For Impact network inaugural steering committee. Accounting For Impact network inaugural steering committee, 2021 - present. This group has received funding from CPA Ontario to develop training and initiatives to support more broad impact from accounting researchers. Event recordings can be found here: <https://www.accountingforimpact.org/events>

• Delivered workshop at the Qualitative Accounting Research Symposium titled "Accounting for Impact Workshop". November 24th, 2023. York University, Toronto, Ontario. • Moderated event with Daniel Aobdia on "Academics involved in Policy and Regulatory Bodies". March 24th, 2023. • Accounting for Impact Launch Event. Speaker. March 29th, 2022. • Workshop facilitator. May 4th, 2022. Social Media: Basics and Beyond. • Workshop facilitator. June 10th, 2022. CAAA Conference. Saskatoon, SK.

2021 – 2022: Enactus Canada Faculty Advisory Committee.

2021: PRME Working Group on Climate Change and the Environment.

2020 – 2021: CSEAR North America Conference. July 2020 (postponed to 2021 due to Covid-19)

2020: Centre for Social and Environmental Accounting Research.

Other Professional Service Activities

2023: Independent Review Committee on Standard Setting in Canada.

2022: CORIS CU Development Grant. Ad Hoc Grant Reviewer

2021: United Nations Principals for Responsible Management Education Accounting, Finance and Investment Research Cluste.

2021: Mitacs Accelerate Research Proposal. Ad Hoc Grant Reviewer

2021: CORIS CU Development Grants. Ad Hoc Grant Reviewer

2021: CPA Ontario Professional Development Interviews. CPA Ontario Professional Development Interviews, June 28, 2021. Interviews will be presented as two 30-minute segments on sustainability accounting for Chartered Professional Accountants (CPA) in Ontario. Will be published in September 2021 (paid).

2021: Sustainable Accounting and Finance Conference Committee.

- Successfully invited and obtained commitment from four leading scholars for panels at the conference (Jan Bebbington, Carol Adams, Charles Cho and Delphine Gibassier)
- Developed and submitted SSHRC Connections grant application
- Reviewed 7 abstracts as part of the Abstract Review Committee
- Currently developing special issue for conference with SAMPJ

Reviewer: Ad Hoc Reviewer for a Journal

2023: Higher Education, Skills and Work-Based Learning.

2023: Accounting Education.

2022 – 2023: Journal of Management & Governance.

2021 – 2023: Accounting Perspectives.
 2022: Accounting Forum.
 2022: Academy of Management Review.
 2018 – 2022: Sustainability Accounting, Management and Policy Journal.
 2021: Accounting Perspectives.
 2021: Journal of Business Ethics.
 2020: Social and Environmental Accountability Journal.
 2018 – 2019: Journal of Accounting & Organizational Change.

Reviewer: Conference Paper

2022: Canadian Academic Accounting Association.
 2020: Canadian Academic Accounting Association.
 2016 – 2017: Canadian Academic Accounting Association.

Scholarly Work in Progress

Papers Under Review

Keddie, L., Damini, E., & Kalyta, P. (2023). "How can accountants enhance (or save) natural and cultural capital valuation?," Revised and resubmitted to *Accounting Perspectives*.
 Keddie, L. & Magnan, N. (2022). "Are ESG performance-based Incentives a Panacea or a Smokescreen for Excess Compensation?," Initial submission to *Sustainability Accounting, Management and Policy*.
 Keddie, L. (2022). "Succumbing to the pressure? An investigation of the influence of stakeholder power on CSR performance-based incentives use," Initial submission to *Accounting Auditing and Accountability Journal*.
 Keddie, L. (2020). "The board of directors and CSR performance-based incentives: what's the link?," Initial submission to *European Accounting Review*.
 Firoozi, M. & Keddie, L. (2020). "Geographical Diversity Among Directors and Corporate Social Responsibility," 4+ revise and resubmit.
 Description: British Journal of Management
 Keddie, L. (2019). "Who is more powerful: the board or management?," Initial submission to *Journal of Business Ethics*.

Working Papers

Keddie, L. (2023). "Towards a taxonomy of ESG performance-based incentives: an exercise in transparency."
 Description: Journal: Accounting Horizons
 Cho, C., Jerome, T., Maurice, J., & Keddie, L. (2023). "Paying for impact? Do the salaries of professors match the impact created?," targeted for Journal of Business Ethics.
 Keddie, L., Damini, E., & Kalyta, P. (2022). "Natural and cultural capital accounting: the case of UNESCO Sites in Canada,," targeted for Accounting Perspectives.
 Cho, C., Jerome, T., Maurice, J., & Keddie, L. (2022). "Paying for impact? Do the salaries of professors match the impact created?," targeted for Journal of Business Ethics.
 Siddiqui, S. & Keddie, L. (2022). "Sustainability Accounting: A bibliometric analysis to understand the state of the research today."
 Keddie, L. & Callery, P. (2022). "Can Corporate Social Responsibility performance-based incentives contribute to greenhouse gas emission reduction?," targeted for Accounting, Organizations and Society.
 Keddie, L. (2022). "The board of directors and ESG incentives: what's the 'link'?", targeted for European Accounting Review.
 Keddie, L. (2022). "Towards a taxonomy of ESG performance-based incentives: an exercise in transparency.."
 Keddie, L. (2019). "What effect (if any) do CSR performance-based incentives have on firm performance?."
 Keddie, L. (2016). "A Study in Equifinality: What Corporate Governance Bundles Underlie Sustainability Performance?."
 Keddie, L. (2014). "Advancing sustainability accounting with a perfect partner: the entrepreneur.."
 Keddie, L. (2014). "Governance for today, tomorrow and beyond: implementing sustainability accounting in the modern firm.."
 Keddie, L. (2013). "How is accounting used to support sustainability? Does it play a role?."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI2819	Sustainability Accounting	0.25	6	Main	50%
2024/Winter	BUSI6000	Seminar in Accounting I	0.17	3	Main	33%

2023/Summer	ACCT5134	Advanced Integration I	0.5	13	Main	100%
2023/Summer	ACCT5134	Advanced Integration I	0.5	24	Main	100%
2023/Summer	ACCT5134	Advanced Integration I	0.5	27	Main	100%
2023/Winter	BUSI6001	Seminar in Accounting II	0.12	1	Main	33%
2023/Winter	BUSI5081	Seminar in Accounting II	0.04	1	Main	33%
2023/Winter	BUSI2819	Sustainability Accounting	0.25	9	Main	50%
2022/Summer	ACCT5134	Advanced Integration I	0.5	27	Main	100%
2022/Summer	ACCT5134	Advanced Integration I	0.5	15	Main	100%
2022/Summer	ACCT5134	Advanced Integration I	0.5	21	Main	100%
2022/Summer	ACCT5134	Advanced Integration I	0.5	21	Main	100%
2022/Summer	ACCT5134	Advanced Integration I	0.5	27	Main	100%
2022/Winter	BUSI6000	Seminar in Accounting I	0.08	1	Main	16%
2022/Winter	BUSI4901	Selected Topics in Management I	0.11	2	Main	50%
2021/Summer	ACCT5134	Advanced Integration I	0.5	13	Main	100%
2021/Summer	ACCT5134	Advanced Integration I	0.5	29	Main	100%
2021/Summer	ACCT5134	Advanced Integration I	0.5	25	Main	100%
2021/Winter	BUSI6001	Seminar in Accounting II	0.12	3	Main	25%
2020/Fall	BUSI4008	Advanced Management Accounting & Control	0.5	38	Main	100%
2020/Summer	ACCT5133	Advanced Integration I	0.5	29	Main	100%
2020/Summer	ACCT5133	Advanced Integration I	0.5	26	Main	100%
2019/Fall	BUSI4008	Advanced Management Accounting & Control	0.5	20	Main	100%
2019/Summer	ACCT5133	Advanced Integration I	0.5	26	Main	100%
2019/Summer	ACCT5133	Advanced Integration I	0.5	22	Main	100%
2019/Summer	ACCT5133	Advanced Integration I	0.5	22	Main	100%
2019/Summer	ACCT5133	Advanced Integration I	0.5	26	Main	100%

Service to the institution (Academic)

University Assignments

PhD. Thesis Committees:

2021-2022: Nusrat Jahan, PhD in Economics

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2022-2023 – 2023-2024: Early Career Committee (Co-Chair)

H. OTHER

Selected Media Appearances: Online

2018 - It's time to train accountants in sustainability

2018 - Rewarding good behaviour

Student Experience Activities

2020 - Financial business plan resource - BUSI: 417 : Acting as financial business plan resource for BUSI 4117: Courts for Change & Northern Lights – contact point: Dr. Troy Anderson • Advised students on market research, costing and pricing re: ceramic water filter bucket for Maasai people

Selected Media Appearances: Online

2021 - The Conversation – 'Quel nouveau cadre comptable pour répondre aux défis environnementaux?'

2021 - The Conversation – 'What is sustainability accounting? What does ESG mean? We have answers'

2021 - The National Post, What is sustainability accounting? What does ESG mean? We have answers'

Selected Media Appearances: Radio

2021 - Sustainable Kingston – sustainably.eco

Selected Media Appearances: Online

2021 - International Investor Magazine (forthcoming Summer 2021 edition). 'Sorting through the hype of ESG'.

Student Experience Activities

2021 - Sprott Social Impact Club : Sprott Social Impact Club presentation on Sustainability Accounting, November 23, 2021.

2021 - Sprott Finance Students Association : Sprott Finance Students Association. March 10th, 2021. Presented two 15-minute segments on 1) private company business valuation and 2) incorporating ESG and sustainability in valuation

2021 - George Brown Sustainability Case Competition : George Brown Sustainability Case Competition. March 4th, 2021. Gave 15-minute presentation on sustainability accounting for students in the case competition.

2021 - Sprott Accounting Students' Association : Social Impact Panel at the Sprott Accounting Students' Association (SASA) Accounting for the Future event. January 30th, 2021.

Selected Media Appearances: Online

2021 - 'Reimagining our financial future' by Lana Pesch

Selected Media Appearances: Radio

2021 - Moses, David. ELMNT FM. : Moses, David. ELMNT FM. Aired in Ottawa and Toronto on March 2nd, re-aired March 10th, & August 2nd 2021. Approximate length – 30 minutes.

Selected Media Appearances: Print

2021 - Paterson, David; Topic: Ontario Power Generation recent adoption of net-zero targets.

Selected Media Appearances: Online

2021 - Balakrishnan, Anita. Jan. 19, 2021. "TC Energy decarbonization response to Keystone setback unlikely to sway ESG investors".

Student Experience Activities

2022 - Data Science (DATA 5000) : Supervised three data science students working to improve the AI model I co-developed to 'read' corporate proxy statements and translate them into various variables for statistical analysis, January – April 2022.

Selected Media Appearances: Print

2022 - Financial Post : Shecter, B. (2022, November 14). Shopify's Tobias Lütke: ESG is a good idea that's now "broken, cynical and counterproductive." Financial Post.

2022 - On The Record : New Research Tackles Food Waste by Including All Stakeholders

2022 - CBC News : Lululemon founder Chip Wilson gifts \$100M to help protect nature in B.C.

2022 - Canada's National Observer : It was obviously shocking in the best way possible": Patagonia pledges profits to the Earth

2022 - National Observer : Why it's so hard to stop wasting food. Canada's

2022 - The Daily Gleaner : Citizen group to review future council raises. Will it work?

Selected Media Appearances: Radio

2022 - BeFM > Morning Wave In Busan > Special Interview

Selected Media Appearances: Television

2023 - Global Manitoba News : Interview to provide comments on food waste.

Selected Media Appearances: Online

2023 - Global News : Winnipeg home economist says look past "best before" dates, shop less to cut down food cost, waste.

Selected Media Appearances: Television

2022 - CBC News : News highlight of our circular economy project. At the 22.45 mark.

Selected Media Appearances: Online

2022 - CU Research : Mapping Food Waste: Deciphering What's Preventing Innovative Waste Reduction Approaches From Scaling U

Student Experience Activities

2022 - Sprott Social Impact Club (SSIC). Social Impact Case competition. : Judge

2022 - MAcc Orientation : Delivered one session on sustainability accounting and one on teamwork at each of the Spring and Fall orientation sessions. May & September 2022.

2022 - Toulouse International D : Invited workshop to students on January 13th & 14th, 2022. Title of presentation: "Sustainability accounting in North America: from reporting to incentivizing sustainability – a (critical) look at the current state of affairs". Presented to 75 participants.

2023 - Sprott Student Investment Fund (SSIF) : Review and feedback on a special proposal related to sustainable investing, January 2023.

Other Activities

2023 - CPA Canada Certification 2.0 - proposed feedback

Selected Media Appearances: Print

2023 - The Conversation – 'ESG Bonuses are on the rise: Are they improving sustainability or just increasing executive wealth?' :

<https://theconversation.com/esg-bonuses-are-on-the-rise-are-they-improving-sustainability-or-just-increasing-executive-wealth-213034>. Metrics: 5,207 readers as of December 7 th, 2023.

Selected Media Appearances: Online

2023 - The Talking Raven - Podcast Appearance : The Talking Raven. Meet our Faculties: Sprott Edition. I spoke with Stanley Philippe for this episode which aired March 31, 2023. The podcast description is as follows: "We conclude Faculty Month with a closer look at Carleton's Sprott School of Business. Leanne Keddle, Assistant Professor in Accounting, shares her perspective on how business can make the world a better place. She also explains why practical learning goes a long way towards ensuring our students' success! Let's spread some #SprottLove".

Selected Media Appearances: Print

2023 - COP28. La Rotonde – University of Ottawa Student Newspaper

Selected Media Appearances: Television

2023 - Right to Repair : Piper, J. March 30th , 2023. Global National. Interview to provide comments on 'Right to Repair' rules proposed by federal government

2023 - Global Manitoba News at 6 - Interview to provide comments on food waste : Rasche, T. January 3rd, 2023. Global Manitoba News at 6. Interview to provide comments on food waste.

Follow-up written article: Gibson, S. (2023, January 3). Winnipeg home economist says look past "best before" dates, shop less to cut down food cost, waste

Credentials

Professional Memberships

PRME, 2021 - Present

Professional Development

Other Professional Development

2021: Carbon Literacy Certification. Achieved Carbon Literacy Certification (obtained tools to use for teaching others about the climate crisis)

Paid Service Experience

2023: McGraw Hill elevatED - Developing Pathways to Success Webinar series, Delivered a webinar to accounting instructors from across Canada as part of the McGraw Hill elevatED - Developing Pathways to Success Webinar Series. Title: An Introduction to Sustainability Accounting and ESG.

2023: McGraw Hill Accounting Symposium, Delivered a 2-part ESG/Sustainability Accounting session to accounting instructors from across Canada at the McGraw Hill Accounting Symposium – The Future of Accounting

2023: CPA Prince Edward Island, Delivered workshop titled: "Exploring Sustainability and ESG Reporting."

2023: CPA New Brunswick, Delivered workshop titled: "Exploring Sustainability and ESG Reporting

2023: CPA Alberta Innovation, Technology and Accounting Conference, Delivered workshop titled: An Introduction to Sustainability Accounting and ESG: From the current state to innovations on the horizon.

2022: CPA Ontario, CPA Ontario Professional Development Interviews, February 2022. Interview will be presented as one 40-minute segment on sustainability accounting related to corporate governance for Chartered Professional Accountants (CPA) in Ontario. Published Spring 2022.

2022: CPA Ontario, CPA Manitoba, CPA Saskatchewan, CPA Alberta and Learn Formula for Canadian and US CPAs., ESG Fundamentals. Course development for CPD with Garth Sheriff. Completed course development on September 15th, 2022. Currently offered by CPA Ontario, CPA Manitoba, CPA Saskatchewan, CPA Alberta and Learn Formula for Canadian and US CPAs.

2022: CPA Alberta for the City of Calgary., CPA Alberta for the City of Calgary. Custom training. An Introduction to ESG and Sustainability Accounting. September 1st, 2022.

Research Reports

2023: Keddie, L., Leveraging Carbon Neutrality Incentives Through Sustainability Accounting., submitted to APEC Urban Energy Report 2023 - Driving Cities through the Low Carbon transition.

2022: Keddie, L., Kevany, K., Trantum, S., Tu, ., Qingshi, T., Bradford, L., Leung, B., MacDonald, K., Jacula, M. No Waste? Know More! Mapping Canada's Circular Food Waste Economy., submitted to Canadian Climate Institute.

Service to the Community

Other Community Service Activities

2022: Signatory to open letter on materiality debate

2020: Canadian Health Adaptations, Innovations, & Mobilization Centre (CHAIM), Acting as financial plan resource for costing and pricing of knowledge mobilization initiative for the Canadian Health Adaptations, Innovations, & Mobilization Centre (CHAIM) – contact point: Dr. Kim Matheson

Curriculum Vitae - Sprott School of Business

Ernest Kwan, PhD
Associate Professor - Tenured, 2013
Sprott School of Business (Technology and Operations/Supply Chain Management)
Telephone: 613-520-2600 x3007
Email: ernest.kwan@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-9407-2018>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. York University.
Master of Arts. University of North Carolina.
Bachelor of Arts. York University.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (July, 2021 - Present), Ottawa, Canada-Ontario.
Assistant Professor, Sprott School of Business, Carleton University (2008 - June, 2021), Ottawa, Canada-Ontario.

Other Employment

Contract Instructor, Department of Psychology, York University (2003 - 2005), Toronto, Canada-Ontario.
Contract Instructor, Institute of Social Research, York University (1999 - 2004), Toronto, Canada-Ontario.
Statistical Consultant, Institute of Social Research, York University (1999 - 2003), Toronto, Canada-Ontario.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		2	1	3
Articles-in-Progress (All)		1		1
Publications in Conference Proceedings (Refereed)		11	2	13
Paper Presentations (Refereed)		4	1	5
Grants - Funded (both refereed and non-refereed)		1		1
Totals		19	4	23

Refereed Scholarly Publications

Articles in Refereed Journals

- Lu, I., & Kwan, E. (2023). An investigation of two remedial measures for retailers to address the impact of disease threat on sustainable consumption: A moderated moderated mediation model. *Journal of Retailing and Consumer Services*, 72, 103254. [A]
- Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). Entrepreneurial Motivation in University Business Students: A Latent Profile Analysis based on Self- Determination Theory. *Entrepreneurship Research Journal*. [B]
accepted for publication; November 25, 2020
- Lu, I., Kwan, E., Heslop, L. A., Thomas, D. R., & Cedzynski, M. (2019). The Ivory Tower and the Street: How researchers defined country image over four decades and what consumers think it means. *Journal of Business Research*, 105, 89-97. [A]
- Thomas, D.R., Kwan, E., & Zumbo, B. (2018). In defence of Pratt's variable importance axioms: A response to Gromping. *Computational Statistics*, 10 (4), 1-10. [B]
- Lu, I., Heslop, L., Thomas, R., & Kwan, E. (2016). An examination of the status and evolution of country image research. *International Marketing Review*, 33 (6), 825-850. [A]
- Thomas, R., Zumbo, B.D., Kwan, E., & Schweitzer, L. (2014). On Johnson's (2000) Relative Weights Method for Assessing Variable Importance: A

Reanalysis. *Multivariate Behavioral Research*, 49 (4), 329-338. [A]

Contribution: Co-author, statistical modelling, editing of final draft for submission

Lu, I., Kwan, E., Thomas, R., & Cedzynski, M. (2011). Two New Methods for Estimating Structural Equation Models: An Illustration and a Comparison to Two Established Methods. *International Journal of Research in Marketing*, 28 (3), 258-268. [A+]

Kwan, E., & Friendly, M. (2011). Graph people versus table people: Reply to Gelman. *Journal of Computational and Graphical Statistics*, 20 (1), 18-27. [A+]

Articles in Refereed Conference Proceedings

Full Paper

Li, L., Fadaeiresketi, Y., Kwan, E., & Lu, I.R.R (2023). Addressing food waste: An exploration of ingredient schema incongruity of upcycled foods. *Global Marketing Conference*.

Seoul

Kwan, E., Lu, I.R.R, Li, L., & Fadaeiresketi, Y. (2023). Segmenting the Gen Zers based on their perceptions of repurposed products: A preliminary study. *Global Marketing Conference*.

Seoul

Lu, I. R., Kwan, E., & Buckingham, S. (2022). The Experiences of Making and Selling Repurposed Products. *American Marketing Association Summer Academic Conference*.

Kwan, E., & Lu, I. (2022). Sustainable consumption and contagion concerns: A comparison of refurbished, repurposed, and recycled products. *American Marketing Association Summer Academic Conference*.

Lu, I., Kwan, E., Li, L., & Buckingham, S. (2022). Exploring Generation Z's Value-Seeking Behaviour toward Repurposed Products. *Canadian Psychological Association Convention*.

Kwan, E., & Lu, I. (2022). The impact of Covid-19 fear on consumer attitude toward sustainable consumption. *Canadian Psychological Association Convention*.

Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). Entrepreneurial motivations in university students. *International Congress of Psychology*.

Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). Entrepreneurial motivations in university students. *International Congress of Psychology*.

Lu, I., Kwan, E., & Buckingham, S. (2020). Exploration of the motivations in repurposing. *International Congress of Psychology*.

Prague, Czech Republic, 19-24 July, 2020. (postponed)

Lu, I., Kwan, E., & Buckingham, S. (2020). Exploring university students' perceptions of repurposed products. *Canadian Psychological Association Convention*.

Montreal, May 28-31, 2020.

Kwan, E., Lu, I., Heslop, L. A., Thomas, D. R., & Cedzynski, M. (2019). The Nature and Evolution of County Image Definition: An Analysis of Four Decades of Research. *Academy of Marketing Conference*.

London, UK. July 2-4, 2019.

Lu, I., Heslop, L. A., Brouard, F., Kwan, E., & Isabelle, D. A. (2019). Understanding the Heterogeneity of Youth's Entrepreneurial Motivations. *Global Research Symposium on Marketing and Entrepreneurship*.

London, UK. June 27-29, 2019

Lu, I., Heslop, L. A., Brouard, F., Kwan, E., & Isabelle, D. A. (2019). Exploring the Profiles of Youth Entrepreneurial Motivation. *Academy of Marketing Conference*.

London, UK. July 2-4, 2019.

Liu, Y., Wu, A., Park, M., & Kwan, E. (2018). Examining Distractors in Multiple-Choice Questions for Classroom Assessments: Learning from Psychometrics. *International Conference on Teaching Statistics*.

Abstract Only

Lu, I., Kwan, E., Heslop, L., Thomas, D.R., & Cedzynski, M. (2018). How country image is defined. *International Conference and Workshop on Experiential Approach to Consumer Decision Making*.

Taichung, Taiwan.

Kwan, E., & Lu, I. (2016). A review of applications of factor analysis in psychological research. *International Congress of Psychology*.

Methodology and Statistics Track, Yokohama, Japan

Schweitzer, L., Zumbo, B., Kwan, E., & Thomas, R. (2016). Revisiting the Pratt index of variable importance through multi dimensional geometry. *International Congress of Psychology*.

Kwan, E., & Lu, I. R. (2015). Teaching statistical inference and the null hypothesis significance controversy. *European Conference on Psychological Assessment*.

Zurich, Switzerland.

Lu, I. R., Heslop, L. A., Thomas, D. R., & Kwan, E. (2015). Country Image Research Review. *Winter Marketing Educators' Conference*.
San Antonio, TX, USA

Lu, I. R., Kwan, E., Thomas, D. R., & Heslop, L. A. (2015). Assessment of consumer heterogeneity: A comparison of two multidimensional latent modeling approaches. *European Conference on Psychological Assessment*.
Zurich, Switzerland

Lu, I. R., Heslop, L. A., Thomas, D. R., & Kwan, E. (2014). Country Image Research: A Content Analysis. *European International Business Academy (EIBA) Annual Conference*.
Uppsala, Sweden

Lu, I. R., Heslop, L. A., Thomas, D. R., & Kwan, E. (2014). Country-of-Origin Research: Publication and Methodology Trends over the Past 35 Years. *Consortium for International Marketing Research (CIMaR) Conference*.
Victoria, BC, Canada

Chen, Y. H., Lu, I. R., Kwan, E., & Chuang, J. (2012). Exploring antecedents of B2B trust: A study of e-marketplace participants. *International Conference on e-Commerce, e-Administration, e-Society, e-Education, and e-Technology (e-CASE & e-Tech)*.
Hong Kong, People's Republic of China

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Kwan, E. & Lu, I. (2022). *The impact of Covid-19 fear on consumer attitude toward sustainable consumption*. Canadian Psychological Association Convention, Calgary, Canada-Alberta.

Kwan, E. & Lu, I. (2022). *Sustainable consumption and contagion concerns: A comparison of refurbished, repurposed, and recycled products*. American Marketing Association Summer Academic Conference, Chicago, Illinois.

Lu, I. R., Kwan, E., & Buckingham, S. (2022). *The Experiences of Making and Selling Repurposed Products*. American Marketing Association Summer Academic Conference, Chicago, Illinois.

Lu, I., Kwan, E., Li, L., & Buckingham, S. (2022). *Exploring Generation Z's Value-Seeking Behaviour toward Repurposed Products*. Canadian Psychological Association Convention, Calgary, Canada-Alberta.

Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). *Entrepreneurial motivations in university students*. International Congress of Psychology, Prague, Czech Republic.

Lu, I., Kwan, E., Heslop, L., & Thomas, D. R. (2018). *How country image is defined*. International Conference and Workshop on Experiential Approach to Consumer Decision Making, Taichung, Taiwan.

Kwan, E., Thomas, R., Schweitzer, L., & Zumbo, B. (2016). *Revisiting the Pratt index of variable importance through multi dimensional geometry*. International Congress of Psychology, Yokohama, Japan.

Other Presentations

Presentation

2010: Carleton University, Ottawa, Canada-Ontario. Guest speaker for Math Matters, topic: "Effective note taking"

Contract or Other Research

Research Grants and Awards

Grants

2020: Lu, I. & Kwan, E., CU COVID-19 Rapid Research Response Grants, Co-Investigator, PRI-Carleton University. [Status: Funded]

2017 [Year 4 of 4]: Kwan, E. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2016 [Year 3 of 4]: Kwan, E. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2015 [Year 2 of 4]: Kwan, E. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2014 [Year 1 of 4]: Kwan, E. Insight Grant (\$24,714.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Reviewer: Ad Hoc Reviewer for a Journal

2019: Journal of Business Ethics.

2019: International Marketing Review.

2011 – 2017: Journal of Applied Statistics..

Reviewer: Conference Paper

2019: European Marketing Academy.

2019: American Marketing Association Winter Academic Conference.

2019: European Marketing Academy.

2010: Sprott PhD Symposium, Ottawa, Canada-Ontario.

Scholarly Work in Progress

Papers Under Review

Kwan, E., Thomas, D. R., Zumbo, B., & Schweitzer, L. (2018). "Examining distractors/options in multiple-choice questions for classroom assessments," Initial submission to *Educational Assessment*.

Lu, I., Kwan, E., Heslop, L., Thomas, D. R., & Cedzynski, M. (2018). "Definitions of country image in academia: An analysis of four decades of research and a comparison to definitions from the general population," Initial submission to *European Journal of Marketing*.

Working Papers

Lu, I., Kwan, E., Heslop, L. A., Brouard, F., & Isabelle, D. (2019). "An examination of youth entrepreneurial motivation based on self-determination theory and latent profile analysis."

Lu, I. & Kwan, E. (2017). "Teaching statistical inference and the null hypothesis significance controversy."

Lu, I., Heslop, A., Thomas, D. R., & Kwan, E. (2017). "The meaning(s) and measurement of country image: A mixed method analysis," targeted for International Marketing Review.

Thomas, R.D., Kwan, E., & Schweitzer, L. (2015). "Variable Importance in Linear Regression in the Presence of Suppressor Variables: Pratt's Method Revisited and Extended."

Description: (Contribution) Co-author, co-editing of final draft for publication

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI3207	Marketing Research	0.5	47	Main	100%
2024/Winter	BUSI6905	Advanced Statistical Methods for Business Research	0.5	4	Main	100%
2023/Fall	BUSI5981	Statistics for Business Research	0.5	2	Main	100%
2023/Fall	BUSI5801	Statistics for Managers	0.25	17	Main	100%
2023/Fall	BUSI5801	Statistics for Managers	0.25	21	Main	100%
2022/Winter	BUSI6905	Advanced Statistical Methods for Business Research	0.5	16	Main	100%
2022/Winter	BUSI3207	Marketing Research	0.5	45	Main	100%
2021/Fall	BUSI5801	Statistics for Managers	0.25	27	Main	100%
2021/Fall	BUSI5981	Statistics for Business Research	0.5	13	Main	100%
2021/Fall	BUSI5801	Statistics for Managers	0.25	23	Main	100%
2021/Fall	BUSI5801	Statistics for Managers	0.25	27	Main	100%
2021/Winter	BUSI3207	Marketing Research	0.5	58	Main	100%
2021/Winter	BUSI5801	Statistics for Managers	0.25	19	Main	100%
2021/Winter	BUSI6905	Advanced Statistical Methods for Business Research	0.5	15	Main	100%
2021/Winter	BUSI6901	Qualitative Research Design	0.5	5	Main	100%
2020/Fall	BUSI5981	Statistics for Business Research	0.5	16	Main	100%
2020/Fall	BUSI5801	Statistics for Managers	0.25	26	Main	100%

2020/Fall	BUSI5801	Statistics for Managers	0.25	24	Main	100%
2020/Winter	BUSI6905	Advanced Statistical Methods for Business Research	0.5	8	Main	100%
2020/Winter	BUSI3207	Marketing Research	0.5	59	Main	100%
2019/Fall	BUSI5801	Statistics for Managers	0.25	27	Main	100%
2019/Fall	BUSI5801	Statistics for Managers	0.25	23	Main	100%
2019/Fall	BUSI5981	Statistics for Business Research	0.28	5	Main	66%
2019/Fall	BUSI5801	Statistics for Managers	0.25	32	Main	100%
2019/Fall	BUSI5981	Statistics for Business Research	0.22	4	Main	44%
2019/Winter	BUSI6905	Advanced Statistical Methods for Business Research	0.5	3	Main	100%
2019/Winter	BUSI6901	Qualitative Research Design	0.5	5	Main	100%
2019/Winter	BUSI3207	Marketing Research	0.5	46	Main	100%
2018/Fall	BUSI6901	Qualitative Research Design	0.5	14	Main	100%
2018/Fall	BUSI5801	Statistics for Managers	0.25	19	Main	100%
2018/Fall	BUSI5801	Statistics for Managers	0.25	10	Main	100%
2018/Fall	BUSI5801	Statistics for Managers	0.25	33	Main	100%
2018/Winter	BUSI6905	Advanced Statistical Methods for Business Research	0.5	7	Main	100%
2018/Winter	BUSI3207	Marketing Research	0.5	54	Main	100%
2017/Fall	BUSI5801	Statistics for Managers	0.25	28	Main	100%
2017/Fall	BUSI6901	Qualitative Research Design	0.5	5	Main	100%
2017/Fall	BUSI5801	Statistics for Managers	0.25	40	Main	100%
2017/Winter	BUSI6905	Advanced Statistical Methods for Business Research	0.5	8	Main	100%
2017/Winter	BUSI3207	Marketing Research	0.5	48	Main	100%
2016/Fall	BUSI6901	Qualitative Research Design	0.5	12	Main	100%
2016/Fall	BUSI5801	Statistics for Managers	0.25	22	Main	100%
2016/Fall	BUSI5801	Statistics for Managers	0.25	42	Main	100%
2016/Winter	BUSI6905	Advanced Statistical Methods for Business Research	0.5	7	Main	100%
2016/Winter	BUSI3207	Marketing Research	0.5	53	Main	100%
2015/Fall	BUSI5801	Statistics for Managers	0.25	36	Main	100%
2015/Fall	BUSI6901	Qualitative Research Design	0.5	5	Main	100%
2015/Fall	BUSI5801	Statistics for Managers	0.25	17	Main	100%

Service to the institution (Academic)

Faculty Assignments

PhD. Comprehensive Committees:

2023-2024: Yalda Fadaeiresketi

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2018-2019 – 2021-2022: Faculty Board - Sprott

2015-2016 – 2017-2018: Faculty Board

2016-2017: Tenure and Promotion Committee - Departmental (Cluster II)

Credentials

Professional Development

Professional Seminars / Workshops

2012: Center for Integrated Latent Variable Research. Attended workshop, "Diagnostic Measurement: Theory, Methods, and Applications", August 2-3, The Center for Integrated Latent Variable Research, University of Maryland, College Park, Maryland, USA

2011: Faculty Teaching Certificate Program. Participant (36 hours), Educational Development Centre, Carleton

2010: Teaching with Technology Roundtable, Educational Development Centre, Carleton University. Participant, "An Academic's Use of an iPad" (1 hour), Educational Development Centre, Carleton

Curriculum Vitae - Sprott School of Business

Ian Lee, PhD
Associate Professor - Tenured, 1992
Sprott School of Business (Management and Strategy)
Telephone: 613-520-2600 x2375
Email: ian.lee@carleton.ca
AACSB Qualification: Practice Academic (PA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-0565-6362>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Carleton University.
Title: *Thesis: The Canadian Postal System: Origins, Growth and Decay of the State Postal Function, 1765-1981*
Master of Arts. Carleton University.
Bachelor of Arts. Carleton University.

B. EMPLOYMENT

Academic Appointments

Assistant Professor, Sprott School of Business, Carleton University (1988 - Present), Ottawa, Canada-Ontario.

Other Employment

Summer Researcher, Machinery of Government, Privy Council Office (1985), Ottawa, Canada.
Specialist, Policy and Procedures, Canada Post Corporation (1983 - 1984), Ottawa, Canada.
Manager, Easy Frame Ltd. (1981 - 1983), Ottawa, Canada. Part-time while in MA.
Mortgage Manager, Bank of Montreal (1978 - 1981), Ottawa, Canada.
Branch Manager, Avco Financial Services (1974 - 1978), Ottawa, Canada.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Paper Presentations (Refereed)		1		1
Research Report, Non-Refereed		1		1
Grants - Funded (both refereed and non-refereed)		2		2
Totals		4		4

Refereed Scholarly Publications

Articles in Refereed Journals

Lee, I. (2016). Canada Pension Plan Enhancement: Issues and Unexpected Outcomes. *How Ottawa Spends*, 37 (10), 267-286.
Chapter 10
Jog, V., & Lee, I. (2016). Reforming Canada's Retirement Savings System – Solutions for a Non-existent Problem? *Public Finance and Management*, 16 (2), 164-186. [B]
Lee, I., & Cross, P. (2015). Reforms to the Federal Public Service during the Harper Years, 2006-2014. *How Ottawa Spends*.

Edited Books

Morris, J., Manne, G., Lee, I., & Zywicki, T. (2017). *Punishing rewards: how clamping down on credit card interchange fees hurts the middle class* MacDonald-Laurier Institute.
Lee, I., & Speer, S. (2016). *Avoiding the federal deficit quicksand*. Ottawa, Ontario: Macdonald-Laurier Institute.
Lee, I. (2015). *Is the cheque still in the mail?*. Ottawa, Ontario: Macdonald-Laurier Institute.
Lee, I., Manne, G. A., Morris, J., & Zywicki, T. J. (2013). *Credit where it's due: How payment cards benefit Canadian merchants and consumers and how regulation can harm them* Ottawa, Ontario: Macdonald-Laurier Institute.

Lee, I. (2011). *Myths and urban legends concerning crime in Canada*. Ottawa, Ontario: Macdonald-Laurier Institute.

Other (Non-refereed) Scholarly Publications

Chapters in non-refereed books

Lee, I., & Cross, P. (2014). The PBO: the first 5 years. In Bruce Doern and Christopher Stoney (Eds.), *How Ottawa Spends, 2014-2015* (pp. 296). McGill-Queens University Press.

Lee, I., & Cross, P. (2013). The alleged downsizing of the federal public service under the Harper government. In Bruce Doern and Christopher Stoney (Eds.), *How Ottawa Spends, 2013-2014* (pp. 296). McGill-Queens University Press.

Lee, I. (2012). Heads versus hearts: the ongoing debate over corporate income tax in Canada. In Bruce Doern (Ed.), *How Ottawa Spends, 2012-2013* (pp. 298). McGill-Queens University Press.

Other Publications

Newspaper Articles or Columns

2016: Morris, J., & Lee, I., *Capping credit card fees would cap benefits to Canadians*. Financial Post, Nov. 9

2016: Lee, I., *Why the Canadian automotive assembly manufacturing is doomed to wither away*. Diplomat magazine, June 2016

2015: Lee, I., *What can public servants expect from Canada's new government?* Global Government Forum, Nov. 20, 2015

2015: Lee, I., *Why the Liberals won't deliver 'real change' on the economy*. Inside Policy, Nov. 15, 2015

2015: Lee, I., *Three economists compare the Harper Economic Record: Jim Stanford, Ian Lee and Mike Moffat*. Macleans, Sept. 26, 2015

2014: Lee, I., *Canadians who can't vote because they lack any ID? Don't believe it*. Macleans, May 9, 2014

2014: Lee, I., *Where is the CBC Heading?* Media Magazine, April 2014

2014: Lee, I., *Canada's loss is Australia's gain in Saputo bid for WC*. The Conversation, Jan. 12, 2014

2013: Lee, I., & Cross, P., *Ignore the scare tactics – Canadians can afford retirement*. The Globe and Mail, Aug. 27, 2013

2013: Lee, I., & Cross, P., *Is inequality a problem worth fixing?* The Globe and Mail, Aug. 6, 2013

2013: Lee, I., & Cross, P., *Why wealth must be included in the inequality debate*. The Globe and Mail, July 26, 2013

2013: Lee, I., *Here's Carney, What to expect of Canada's superstar banker*. The Conversation, July 1, 2013

2013: Lee, I., & Jog, V., *No pension savings crisis*, Financial Post, May 14, 2013. No pension savings crisis, Financial Post, May 14, 2013

2013: Lee, I., *Residency requirements put Senators in an impossible situation*. Ottawa Citizen, May 15, 2013

2013: Lee, I., *No longer hyphenated Liberals cast aside the blue Liberals*. No longer hyphenated Liberals cast aside the blue Liberals, Ottawa Citizen, April 15, 2013

2013: Lee, I., *Thatcher faced opposition from all sides*. Thatcher faced opposition from all sides, Ottawa Citizen, April 11, 2013

2013: Lee, I., & Jog, V., *The Two pension Crises*. Inside Policy, April 9, 2013

2013: Lee, I., *Public Service Benefits are no longer sustainable*. Ottawa Citizen, March 16, 2013

2013: Lee, I., *Canada's Senate work as intended*. Ottawa Citizen, Feb. 22, 2013

2013: Lee, I., *Fighter jets are not snowblowers: the case for the F-35*. iPolitics, Feb. 8, 2013

2013: Lee, I., *Conservatives should remember why we needed a PBO*. Ottawa Citizen, Jan. 26, 2013

2013: Lee, I., *Nortel - populist anger doesn't make a legal case*. Ottawa Citizen, Jan. 15, 2013

2012: Lee, I., *It's time for accountability and transparency in unions*. Ottawa Citizen, Dec. 16, 2012

2012: Lee, I., *Obama and Boehner - so close yet so far apart*. Ottawa Citizen, Dec. 28, 2012

2012: Lee, I., *Respect, tolerance don't threaten academic freedom*. Ottawa Citizen, Nov. 27, 2012

2012: Lee, I., *Tear down the supply management wall in Canada*. Toronto Star, June 27, 2012

2012: Lee, I., & Kalogerakos, N., *Endgame approaches for euro*. Ottawa Citizen, June 17, 2012

2012: Lee, I., *It's all about geography[re legislating Air Canada back to work]*. Ottawa Citizen, March 14, 2012

2011: Lee, I., *The red queens of Europe meet the Iron Chancellor from Germany*. iPolitics.ca, Dec. 14, 2011

2011: Lee, I., *If Canada can privatize the post office...* New York Times, Dec. 7, 2011

2011: Lee, I., *The Milking of Canadians*. Toronto Star, Nov. 21, 2011

2011: Lee, I., *Why Greece is not long for the Eurozone*.

2011: Lee, I., *The real US debt crisis is still to come*. The real US debt crisis is still to come, Ottawa Citizen, Aug. 1, 2011

2011: Lee, I., *Tame the CMHC Godzilla*. Ottawa Citizen, July 19, 2011

2011: Lee, I., *The decline and fall of the post office*. Ottawa Citizen June 4, 2011

2011: Lee, I., & Pennie, K., *F-35s an integral part of Air Force's future*. Ottawa Citizen, April 25, 2011

2011: Lee, I., *Scholars behaving badly*. National Post, March 23, 2011

2011: Lee, I., & Winn, C., *Students targeting the wrong Mideast nation*. Ottawa Citizen, Feb. 15, 2011

2010: Lee, I., *Why the Lansdowne project is a bad deal*. Ottawa Business Journal, June 25, 2010

Other Publications

2012: Lee, I., *Striking Out: The New Normal in Canadian Labour Relations*. Journal of Parliamentary and Political Law.

2011: Lee, I., *Straight talk series speaks with Ian Lee on supply management*. Macdonald Laurier Institute, November 2011

2010: Lee, I., *Pension crisis – what crisis?* Financial Management Institute, May 21, 2010

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Lee, I. & Librowicz, . (2019). *Internationalization by FDI: From Polish communist state owned firm to multinational corporation*. Global Business and Technology Association, Paris, France.

Other Presentations

Presentation

2020: Association of Retired Jewish Professionals. Zoom presentation on "Canada: Pre COVID, COVID and post COVID economy

2020: Northwind Institute. Zoom presentation on Govt of Canada deficits and fiscal policy

2020: Rotary Club. Zoom presentation on future of Canadian economy post COVID

2020: Association of Financial Professionals, Ottawa, Canada-Ontario. (Jan. 15, 2020) Canadian Economic Outlook

2020: Canadian Revenue Agency, Ottawa, Canada-Ontario. (Jan. 23, 2020), Why Canada Post will disappear by 2030

2020: Pearson Center. (Feb. 25, 2020), Pipelines – time for indigenous ownership

2020: Ottawa Construction Association, Ottawa, Canada-Ontario. Canadian and US Economic 2029 Outlook

2020: Economic Freedom Conference, Calgary, Canada-Alberta. April 24-25, 2020

2019: Association of Financial Professionals, Ottawa, Canada-Ontario. (Jan. 15, 2019) Canadian Economic Outlook

2019: Conservative Party of Canada. Strategic Analysis of Canada Post

2019: Canadian Institute of Financial Planners, Toronto, Canada-Ontario. (April 11 2019), Retirement savings system in Canada

2019: Canadian Institute of Financial Planners, Vancouver, Canada-British Columbia. Retirement savings system in Canada

2019: Economic Freedom Conference, Calgary, Canada-Alberta. (Nov. 15-16, 2019) Economic Freedom Conference

2018: City of Ottawa Planning Department, Ottawa, Canada-Ontario. (Jan. 27, 2018), Ecommerce vs bricks and mortar

2018: Pearson Center. (Nov. 26, 2018), Deficits, debts and the aging crisis

2018: Canadian Economic Outlook Update Panel Discussion, Ottawa, Canada-Ontario. Jan. 16, 2018

2018: Concordia University School of Community and Public affairs, Montreal, Canada-Quebec. "Panel: NAFTA – a success story or damaging policy?", Concordia University School of Community and Public affairs", Thomas Mulcair debates Ian Lee, March 6, 2018

2017: Canadian Economic Outlook Update Panel Discussion, Ottawa, Canada-Ontario. Scotiabank Deputy Economist and Ian Lee, Association for Financial Professionals (AFP), Jan. 18, 2017

2017: CURAC Annual Conference, Ottawa, Canada-Ontario. "Trump, NAFTA and Canada", Carleton University, May 14, 2017

2017: Legal & Legislative Update International Foundation of Employee Benefit Plans, Ottawa, Canada-Ontario. "The impact of Trump's policies on Canada", May 18, 2017

2017: Carleton Academic Student Government (CASG) and Carleton University Students' Association (CUSA), Ottawa, Canada-Ontario. "Free Post-Secondary Tuition Debate" with Ian Lee and Yasir Naqvi, Nov. 23, 2017

2017: Canadian Investments Institute. "Trumponomics and what it means for Canada, November, 2017

2016: Canada Post Task Force, Ottawa, Canada-Ontario. (May 31, 2016) Presentation to Canada Post Task Force, Ottawa

2016: Agriculture Canada Policy Branch, Ottawa, Canada-Ontario. (June 22, 2016) Critique of supply management

2016: Canadian Economic Outlook Update Panel Discussion, Ottawa, Canada-Ontario. RBC VP and Ian Lee, Association for Financial Professionals (AFP), Jan. 20, 2016

2016: Rotary Club, Ottawa, Canada-Ontario. Why there is no need to reform CPP, May 3, 2016

2015: Canadian Network for Energy Policy Research and Analysis Conference, Calgary, Canada-Alberta. Do ENGOs that advocate social license for resource companies possess social license, Canadian Network for Energy Policy Research and Analysis Conference on Public Acceptance of Energy Projects, University of Calgary school of Public Policy, Sept. 15, 2015

2015: Carleton University Retirees Association, Ottawa, Canada-Ontario. No savings crisis, no pension crisis", Oct. 23, 2015

2015: Annual Canadian Employee Benefits Conference, Las Vegas, Nevada. Public sector pensions plans under fire, Nov. 23, 2015

2015: Lancaster House Pension Conference, Toronto, Canada-Ontario. The Politics of Pensions: What lies ahead for Canada's public pension system?, Dec. 2, 2015

2014: Norman Paterson School of International Affairs (NPSIA), Carleton University, Ottawa, Canada-Ontario. There is no affordable housing crisis, NPSIA Affordable Housing Debate, Parliament Hill, Feb. 4, 2014

2014: Almonte Professionals Club, Almonte, Canada-Ontario. Policy Options in a Slow Growth Economy, Sept. 26, 2014

2014: University of Calgary School of Public Policy, Calgary, Canada-Alberta. NGOs, Risk & Public Policy, Calculating risk & its influence on public policy, June 23, 2014

2012: Financial Management Institute of Canada, Webinar, Virtual. Replacement of Defined Benefit Pension Plans by a Revamped Defined Contribution Pension Plan for the Public Sector, FMI Webinar, Jan 12, 2012

2012: Ottawa Economics Association, Ottawa, Canada-Ontario. A Budget for Our Times? Jan. 19, 2012

2011: Ontario Confederation of University Faculty Associations, Toronto, Canada-Ontario. Advantages & Challenges of Off-shore programs in the Developing World, January, 2011

2011: Green meeting Industry Council, Portland, Oregon. Vulnerability of Air Travel: Peak Oil and Climate Regulation, February, 2011

2011: Rotary Club, Ottawa, Canada-Ontario. Eurozone crisis, March 2011

2011: Canadian Association of Management Consultants, Ottawa, Canada-Ontario. Strategic Planning in GoC: A Primer & Overview, March 2011

2011: EURUS, Will the Euro end Europe, Carleton University, Ottawa, Canada-Ontario. Gotterdammerung: the death of the European Gods & the modern welfare state, Sept. 28, 2011

2010: Carleton University Political Science Seminar Series, Ottawa, Canada-Ontario. Financial Crisis 2007-08: Failures of Governance and Government Failure, January 2010

2010: Carleton EURUS Conference on Europe, Ottawa, Canada-Ontario. Adoption of the Euro & Origins of European Sovereign Debt Crisis, August 2010

Contract or Other Research

Research Grants and Awards

Grants

2021 [Year 2 of 2]: Lee, I. & Ji, S., Multidisciplinary Research Catalyst Fund, Collaborator, PRI-Carleton University. [Status: Funded]

2020 [Year 1 of 2]: Lee, I. & Ji, S., Multidisciplinary Research Catalyst Fund, Collaborator, PRI-Carleton University. [Status: Funded]

2016: Lee, I. Canada Mortgage and Housing Corporation, Co-Investigator, Canada Mortgage and Housing Corporation. [Status: Funded]

Other Professional Activities

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4609	Strategic Management	0.5	49	Main	100%
2024/Winter	BUSI4609	Strategic Management	0.5	48	Main	100%
2023/Fall	BUSI4609	Strategic Management	0.5	40	Main	100%
2023/Fall	BUSI4609	Strategic Management	0.5	50	Main	100%
2023/Fall	BUSI4609	Strategic Management	0.5	44	Main	100%
2023/Winter	STGY5900	Corporate & Business Strategy	0.5	38	Shanghai	100%
2023/Winter	BUSI4609	Strategic Management	0.5	34	Main	100%
2023/Winter	BUSI4609	Strategic Management	0.5	31	Main	100%
2022/Fall	BUSI4609	Strategic Management	0.5	36	Main	100%
2022/Fall	BUSI4609	Strategic Management	0.5	36	Main	100%
2022/Fall	BUSI4609	Strategic Management	0.5	41	Main	100%
2022/Winter	BUSI4609	Strategic Management	0.5	42	Main	100%

2022/Winter	STGY5900	Corporate & Business Strategy	0.5	34	Shanghai	100%
2022/Winter	BUSI4609	Strategic Management	0.5	40	Main	100%
2021/Fall	BUSI4609	Strategic Management	0.5	49	Main	100%
2021/Fall	BUSI4609	Strategic Management	0.5	50	Main	100%
2021/Fall	BUSI4609	Strategic Management	0.5	51	Main	100%
2021/Summer	STGY5900	Corporate & Business Strategy	0.5	28	Shanghai	100%
2021/Winter	BUSI4609	Strategic Management	0.5	46	Main	100%
2021/Winter	BUSI4609	Strategic Management	0.5	47	Main	100%
2021/Winter	BUSI4609	Strategic Management	0.5	49	Main	100%
2020/Fall	BUSI4609	Strategic Management	0.5	48	Main	100%
2020/Fall	BUSI4609	Strategic Management	0.5	52	Main	100%
2020/Fall	BUSI4609	Strategic Management	0.5	48	Main	100%
2020/Winter	BUSI4609	Strategic Management	0.5	47	Main	100%
2020/Winter	BUSI4609	Strategic Management	0.5	47	Main	100%
2019/Fall	BUSI4609	Strategic Management	0.5	20	Main	100%
2019/Fall	BUSI4609	Strategic Management	0.5	47	Main	100%
2019/Fall	BUSI4609	Strategic Management	0.5	30	Main	100%
2019/Winter	STGY5900	Corporate & Business Strategy	0.5	29	Shanghai	100%
2019/Winter	STGY5900	Corporate & Business Strategy	0.5	19	Shanghai	100%
2018/Winter	STGY5900	Corporate & Business Strategy	0.5	41	Shanghai	100%
2017/Winter	BUSI4609	Strategic Management	0.5	32	Main	100%
2017/Winter	BUSI4609	Strategic Management	0.5	48	Main	100%
2017/Winter	BUSI4609	Strategic Management	0.5	46	Main	100%
2017/Winter	STGY5900	Corporate & Business Strategy	0.5	28	Shanghai	100%
2016/Fall	BUSI4609	Strategic Management	0.5	47	Main	100%
2016/Fall	BUSI4609	Strategic Management	0.5	47	Main	100%
2016/Fall	STGY5900	Corporate & Business Strategy	0.5	31	Shanghai	100%
2016/Winter	BUSI4609	Strategic Management	0.5	44	Main	100%
2016/Winter	BUSI4609	Strategic Management	0.5	41	Main	100%
2015/Fall	BUSI4609	Strategic Management	0.5	42	Main	100%
2015/Fall	BUSI4609	Strategic Management	0.5	46	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2018-2019: Internal-External, Monzur Murshed, TIM

2018-2019: Internal-External, Renuka Gamage, TIM

2018-2019: Internal-External, Seyed Ayat Tadjalli, TIM

2018-2019: Elizabeth Lance, TIM

2018-2019: Internal-External, Ali Nasari, TIM
2017-2018: Internal-External, Parisa Badalkhani, TIM
2017-2018: Internal-External, Raed Iskandar, TIM
2017-2018: Internal-External, Raheleh Bahrami Khodabandeh
2017-2018: Ewan Reid, TIM
2016-2017: Internal-External, Faisal Faza, TIM
2016-2017: Internal-External, Abdallah Sunna, TIM
2016-2017: Internal-External, Mohamad Amin, TIM
2015-2016: Internal-External, Mehdi Kadivar, TIM
2015-2016: Internal-External, Christ Habib, TIM
2015-2016: Internal-External, Olukayode Adegboyega, TIM
2015-2016: Internal-External, Hamidreza Kavandi, TIM
2014-2015: Internal-External, David Ker, TIM
2014-2015: Internal-External, Mel Mezen, TIM
2014-2015: Internal-External, Afaf Alzahrani, TIM
2013-2014: Internal-External, Behrooz Talle, TIM
2013-2014: Internal-External, Art Low, TIM
2012-2013: Internal-External, Chris McFee, TIM
2012-2013: Internal-External, Adefemi Debo-Omidokun, TIM
2012-2013: Internal-External, Nerva Joachim, TIM
2012-2013: Internal-External, Femi Olawale, TIM
2012-2013: Internal-External, Leonard de Baets, TIM
2012-2013: Internal-External, Brian Jensen, TIM
2012-2013: Internal-External, Ludovico Prattico, TIM
2012-2013: Internal-External, Aparna Shanker, TIM
2011-2012: Internal-External, Jainal Christy, TIM
2011-2012: Internal-External, Chris Justus, TIM
2011-2012: Internal-External, Erik Esseler, TIM
2010-2011: Internal-External, Shiga, Amanda, TIM

University Assignments

Masters Thesis Committees:

2012-2013: Internal-External, Shruti Satsangi, TIM

University Assignments

Masters Thesis Committees:

2015-2016: Internal-External, Walter Miron, TIM
2013-2014: Internal-External, Simar Yoos, TIM
2010-2011: Internal-External, Sorin Sorlescu, TIM

University Assignments

PhD. Thesis Committees:

2010-2011: Andrea Rounce, Political Science

University Assignments

PhD. Thesis Committees:

2017-2018: Nataliya Rylska, SPPA
2014-2015: Christian Bordeleau, SPPA
2011-2012: Tiziana Carafa, Political Science

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Other Activities

- 2017 - Appearance before House of Commons Standing Committee on Finance : RE Budget implementation bill C-63, Nov. 9
- 2017 - Appearance before House of Commons Standing Committee HUMA : RE advancing inclusion for seniors, Oct. 17
- 2016 - Appearance before House of Commons Standing Committee on Finance : RE Budget implementation bill and pension reform", May 12
- 2016 - Appearance before House of Commons Standing Committee on Finance : Feb. 19
- 2015 - Appearance before House of Commons Standing Committee on Finance : June 4
- 2015 - Appearance before House of Commons Standing Committee on Procedures and House Affairs : May 26, 2015
- 2015 - Appearance before Senate Standing Committee on Legal and Constitutional Affairs : RE changes to Tax Act to require disclosure of union executive salaries, May 7, 2015
- 2015 - Appearance before Senate Standing Committee on Banking, Trade and Commerce : RE Bill S-210 criminal rate of interest", May 6, 2015
- 2015 - Appearance before Ontario Legislative Assembly Finance Committee : RE proposed ORPP", Jan. 22, 2015
- 2014 - Appearance before Senate Committee on National Finance : RE Public Service labour relations, May 6, 2014
- 2014 - Appearance before Senate Legal and Constitutional Affairs Committee : RE vouching in Bill C-23, An Act to amend the Canada Elections Act and other Acts, May 1, 2014
- 2014 - Appearance before House of Commons' Standing Committee on Procedure and House Affairs : RE vouching in Bill C-23, An Act to amend the Canada Elections Act", March 31, 2014
- 2013 - Appearance before House of Commons Standing Committee on Finance : RE Reforms to Canada Labour Code, Nov. 26, 2013
- 2013 - Appearance before Senate Banking Committee : RE Bill C-377 that imposes salary disclosure on union executives, May 23, 2013
- 2013 - Appearance before House of Commons Standing Committee on Finance : Inequality in Canada and the critical role of PSE, April 25, 2013
- 2012 - Appearance before House of Commons Government Operations Committee : RE Comments concerning P3s as a policy tool for government", November 1, 2012
- 2012 - Appearance before Senate Committee on National Finance : RE Budget Bill 38, Division 5, June 12, 2012
- 2012 - Appearance before House of Commons Finance Committee : RE Budget Bill 38 concerning CMHC amendments, May 31, 2012
- 2012 - Appearance before Senate sitting as Committee of the Whole : RE Bill 39, back to work legislation, May 31, 2012
- 2012 - Appearance before Standing Committee on Banking Trade and Commerce : RE Budget Bill 38, Division 2, 10, 22, 28, 36", May 30, 2012
- 2011 - Appearance before House of Commons International Trade Committee : Supply management & IP as Canadian trade barriers", Nov. 22, 2011
- 2011 - Appearance before House of Commons Public Safety Committee : Urban legends vs empirical reality", Public Safety Committee, March 3, 2011
- 2011 - Appearance before House of Commons Finance Committee : RE Budget proposals for the Federal Budget, Feb. 15, 2011
- 2010 - Appearance before House of Commons Finance Committee : Submission concerning pension reform, April 15, 2010

Selected Media Appearances: Television

- 2017 - Budget 2017, Budget Day Lockup : Analyst invited by Global TV, March 22, 2017
- 2016 - Budget 2016, Budget Day Lockup : Analyst invited by Global TV, March 22, 2016
- 2015 - Budget 2015, Budget Day Lockup : Analyst invited by Global TV, April 21, 2015
- 2014 - Budget 2014, Budget Day Lockup : Analyst invited by Global TV, Feb. 11, 2014
- 2013 - Budget 2013, Budget Day Lockup : Analyst invited by Global TV, March 21, 2013
- 2012 - Budget 2012, Budget Day Lockup : Analyst invited by Global TV, March 29, 2012
- 2011 - Budget 2011, Budget Day Lockup : Analyst invited by Global TV, June 6 and March 22 2011

Other Activities

- 2010 - Government of Canada Minister of Finance 5th Annual Strategic Retreat : "Five Policy Priorities for the Government of Canada", Aug. 10-11, Wakefield, Quebec

Selected Media Appearances: Television

- 2010 - Budget 2010, Budget Day Lockup : Analyst invited by Global TV, March 4, 2010

Student Experience Activities

- 2014 - Sprott Alumni Event : Facts, Fiction and Actions: the Canadian Debate on Income Inequality and Pension Inadequacy, Ottawa ON March 20, 2014. with Jog, V.
- 2011 - Presentation to Sprott Finance Faculty Student Association : Why Greece & Portugal must leave the Eurozone, Carleton University, Ottawa ON, Oct 26, 2011

Other Activities

2011 - Annual Strategic Retreat of the Govt of Canada Minister of Finance : Five Policy Priorities for the Government of Canada, the 5th annual Strategic Retreat of the Govt of Canada Minister of Finance James Flaherty, Wakefield, Quebec, Aug 10/11, 2011

Selected Media Appearances: Television

2015 - CBC TV, The Exchange : Regular appearances every second week

2016 - CBC TV, The Exchange : Regular appearances every second week

2017 - CBC TV, The Exchange : Regular appearances every second week

Selected Media Appearances: Radio

2017 - CFRA, the Rob Snow Show : Thursdays from 12.30 to 1 pm every week.

2017 - CBC Radio Syndication : On average once per month wherein I speak with 10-15 CBC radio stations from across Canada.

Selected Media Appearances: Television

2017 - CTV News Channel and CTV Canada AM : Approximately once per month

Selected Media Appearances: Radio

2017 - Arlene Byron show on Sirius Radio : Weekly appearances

2017 - Danielle Smith on 770 Talk Radio, Calgary Corus Radio : Weekly appearances

2017 - Geoff Currier on CJOB, Winnipeg : Weekly appearances

2017 - Pamela McCall, 770 CFX, Victoria : Weekly appearances

2017 - Bill Kelly, AM 900, CHML, Hamilton : Weekly appearances

Selected Media Appearances: Print

2018 - Even if back to work, Canada Post is still plagued by deeper issues, Globe & Mail : 2018, Nov. 25

Selected Media Appearances: Online

2019 - 25th anniversary of e-commerce, CTV News : 2019, Aug. 3

Selected Media Appearances: Print

2018 - Barring major changes, Canada Post is headed for the corporate graveyard, Globe & Mail : 2018, Jan. 25

Other Activities

2020 - Appearance before House of Commons Standing Committee on Finance : Pre budget consultation, Feb. 5, 2020

2019 - Appearance before Senate National Finance Committee : "Support for seniors", May 28, 2019

2019 - Appearance before House of Commons Standing Committee on Finance : re Universal Pharmacare, May 15, 2019

2018 - Appearance before Senate Committee on Constitutional Affairs : re "identification systems for voting", Nov. 28, 2018

2018 - Appearance before House of Commons Standing Committee on Finance : re Budget Implementation, Nov. 8, 2018

2018 - Appearance before House of Commons Procedure and House Affairs Committee : re identification requirements for voters re Lee's Globe Op-Ed, June 6, 2018

2017 - Appearance before House of Commons Standing Committee on International Trade : Canadian steel industry competitiveness, March 9, 2017

2016 - Appearance before House of Commons Skills, Human Resources and Social Development Committee : re poverty reduction strategies, Nov. 1, 2016

2016 - Appearance before House of Commons Standing Committee on Finance : pre budget consultation, Sept. 29, 2016

2020 - City of Ottawa Development Committee : Appearance in support of expanding urban boundaries

2020 - Appearance before House of Commons Standing Committee on Finance : Appearance re COVID economic measures

Selected Media Appearances: Radio

2022 - CBC Radio Syndication

2021 - CBC Radio Syndication

2022 - Rogers Talk Radio

2020 - Rogers Talk Radio

2021 - Rogers Talk Radio

2022 - Sirius National Radio

2023 - Rogers Talk Radio : Multiple appearances in a week

2023 - Sirius National Radio : Multiple appearances in a week

Selected Media Appearances: Television

2023 - BNN - Bloomberg Weekly

2023 - CTV News Channel

Selected Media Appearances: Print

2021 - Ottawa must do more to integrate Gatineau into the National Capital : Ottawa Citizen

Credentials

Research Reports

2022: Lee, I., Ownership and rental of office space in the city of Ottawa vs City of Gatineau., submitted to Government of Canada.

Service to the Community

Speech / Presentation at a Community Meeting

2014: Ontario Stone Sand & Gravel Association, Overview on Infrastructure Policy & Spending in Canada, Feb. 27, 2014

2014: YMCA Friday Luncheon Discussion Club, Urban Legends & Inconvenient Truths concerning Canadian public policy

2013: Kiwanis Club Ottawa, Economic growth and reskilling, Oct. 12, 201

2011: Friends of Lansdowne Meeting, The long & winding road of Lansdowne, Sept. 26, 2011

2011: Peace, Order & Good Government Association, The Europeanization of Ontario's budget, Ottawa, ON, Oct 1, 2011

Curriculum Vitae - Sprott School of Business

Shi Li, PhD

Assistant Professor - Preliminary - Tenure Track

Sprott School of Business (Finance)

Telephone: 613-520-2600 x8581

Email: shi.li@carleton.ca

AACSB Qualification: Scholarly Academic (SA) , Participation: Participating

OrcidID: <https://orcid.org/0000-0001-9769-1191>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Manitoba.

Master of Science. University of Warwick.

Title: *with Merit*

Bachelor of Science. Cass Business School.

B. EMPLOYMENT

Academic Appointments

Assistant Professor, Sprott School of Business, Carleton University (2020 - Present), Ottawa, Canada-Ontario.

Course Instructor, University of Manitoba (2018 - 2017), Winnipeg, Canada-Manitoba.

Lab Instructor, University of Manitoba (2016), Winnipeg, Canada-Manitoba.

C. PROFESSIONAL HONOURS

2018: Dean's Recognition Letter for Teaching Excellence, Asper School of Business.

2017: McGiverin Fellowship, Asper School of Business. Ph.D. Student Travel Fund..

2017: Dean's Recognition Letter for Teaching Excellence, Asper School of Business.

2015 – 2016: Graduate Fellowship, University of Manitoba.

2015: Canadian Credit Management Foundation Fellowship, University of Manitoba.

2014: International Graduate Student Entrance Scholarship, University of Manitoba.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	2	4		6
Articles-in-Progress (All)	1	10		11
Paper Presentations (Refereed)	5	5		10
Grants - Funded (both refereed and non-refereed)		6		6
Totals	8	25		33

Refereed Scholarly Publications

Articles in Refereed Journals

Huang, W., Zhu, Y., Li, S., & Xu, Y. (2024). Institutional investor heterogeneity and systemic financial risk: Evidence from China. *Research in International Business and Finance*, 68, 102162. [B]

Jacoby, G., Li, S., Lin, N., & Yang, Y. (2024). Disagreement exploitation and the cross-section of hedge fund performance. *Financial Management*, 53 (4), 681-713. [A]

First published: 21 August 2024

Guo, P., Li, S., & Wang, Y. (2023). Asset pricing with dividend surprises. *Finance Research Letters*, 58 (B), 104353. [A]

Guo, X., Li, S., Song, X., & Tang, Z. (2023). ESG, financial constraint and financing activities: A study in the Chinese market. *Accounting and Finance*. [A]

DOI only Early View

Online Version of Record before inclusion in an issue

Li, S., Wenli, H., Zhen, Q., & Zhang, Q. (2022). Macro Disagreement and International Stock Markets. *Journal of International Financial Markets, Institutions and Money*, 81, 101659. [A]

Li, S. (2022). Spillovers Between Bitcoin and Meme Stocks. *Finance Research Letters*, 50, 103218. [A]

Gong, Q., Jacoby, G., Li, S., & Lu, L. (2021). Commonality in disagreement. *Pacific Basin Finance Journal*, 67, 101573. [A]

Li, S., Li, T., Mittoo, U. R., Song, X., & Zheng, S. X. (2019). ADR Valuation and Listing of Foreign Firms in U.S. Equity Markets. *Journal of International Financial Markets, Institutions and Money*, 58. [A]

Jacoby, G., Li, S., & Guang, Y. (2018). Mean-Variance Theory with Imprecise Accounting Information. *Finance Research Letters*, 26 (C), 156-161. [A]

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Li, S. (2022). *Effects of Geopolitical Risk on Equity-Agricultural-Commodity Correlations*. The Impact of Fintech and Climate Change on Agricultural Finance and Investment Conference, Virtual, Virtual.

Li, S. (2022). *Effects of Geopolitical Risk on Equity-Agricultural-Commodity Correlations*. International Conference on Derivatives and Capital Markets, Virtual, Virtual.

Li, S. (2022). *Does the U.S. ESG Sector Lead the World? Evidence from Dynamic Connectedness between the World ESG Sector and the U.S. ESG Sector*. Lixin Forum on Green Finance and Innovation Conference, Virtual, Virtual.

Li, S. (2022). *Disagreement Exploitation and the Cross-Section of Hedge Funds Performance*. Financial Management Association, Atlanta, Georgia.

Li, S., Huang, ., Qi, ., & Zhang, . (2021). *Macro Disagreement and International Stock Markets*. Cross Country Perspectives in Finance, Virtual, Virtual.

Li, S., Jacoby, ., Lu, ., & Wang, . (2021). *The Pricing of Unexpected Dividends*. International Conference of the French Finance Association, Virtual, Virtual.

Li, S., Jacoby, G., & Lu, L. (2020). *Commonality in Disagreement and Stock Returns*. China International Risk Forum & China Finance Review International Joint Conference, Virtual, Virtual.

Li, S., Jacoby, G., & Lu, L. (2020). *Commonality in Disagreement and Stock Returns*. International Conference on Derivatives and Capital Markets Meeting, Virtual, Virtual.

Li, S., Jacoby, G., & Lu, L. (2019). *Deviation from Target Dividend Payout and the Cross-Section of Stock Returns*. Financial Management Association, New Orleans, Louisiana.

Li, S., Jacoby, G., & Lu, L. (2019). *Deviation from Target Dividend Payout and the Cross-Section of Stock Returns*. Eastern Finance Association, Miami, Florida.

Jacoby, G., Li, S., & Lu, L. (2018, November). *Deviation from Target Dividend Payout and the Cross-Section of Stock Returns*. Southern Finance Association, Asheville, North Carolina.

Li, S., Mitto, ., Song, ., & Zheng, . (2017). *Valuation and Listing of Foreign Firms in U.S. Equity Markets*. Cross Country Perspectives in Finance Conference, Chiang Mai, Thailand.

Jacoby, G., Li, S., & Wang, . (2015, June). *Mean-Variance Theory with Imprecise Accounting Information*. Multinational Finance Society Conference, Halkidiki, Greece.

Other Presentations

Invited Lecture

2023: Carleton University. Title: Gains and Losses of Investing
Sprott Finance Students; Association and Sprott Tax Students' Association

Presentation

2023: Pacific-Basin Finance Journal. Special Issue Conference

2023: Cross Country Perspectives in Finance Conference. Presentation Title: Firm-level Climate Change Exposure and Stock Price Crash Risk: International Evidence

June 2023 & December 2023

2022: China Academy of Financial Research.

2022: International Symposium on Frontiers of Macroeconomics and Fintech.

Contract or Other Research

Research Grants and Awards

Grants

2025 [Year 3 of 3]: Li, S. Insight Development Grant (\$16,457.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 2 of 3]: Li, S. Insight Development Grant (\$16,457.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 2]: Li, S. Insight Development Grant (\$22,440.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 4 of 4]: Li, S. Insight Grant (\$4,250.00), Principal Investigator, University of Manitoba. [Status: Funded]

2023 [Year 1 of 3]: Li, S. Insight Development Grant (\$16,457.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 2 of 4]: Li, S. Insight Grant (\$4,250.00), Principal Investigator, University of Manitoba. [Status: Funded]

2022: Li, S. CuResearch Development Grant - SSHRC Explore (\$10,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2022 [Year 1 of 2]: Li, S. Insight Development Grant (\$22,440.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021: Li, S. Start-up Funds (\$20,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Li, S. New Research Collaboration (\$14,400.00 Not Funded), Principal Investigator, France Canada Research Fund. [Status: Not Funded]

2021 [Year 1 of 4]: Li, S. Insight Grant (\$4,250.00), Principal Investigator, University of Manitoba. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2023: Cross Country Perspectives in Finance Conference, Virtual, Virtual.

2020 – 2023: China International Risk Forum & China Finance Review International Joint Conference.

2021: International Conference of the French Finance Association.

2020: International Conference on Derivatives and Capital Markets Meeting.

2019: Financial Management Association, Miami, Florida.

2016: Cross Country Issues on Credit, Banking, Asset Pricing, and Market Liquidity, Taiyuan, China.

Chair: Conference / Track / Program

2022: Sustainable Accounting and Finance Conference.

2020: International Conference on Derivatives and Capital Markets Meeting.

2019: Financial Management Association, New Orleans, Louisiana.

2018: Southern Finance Association Annual Meeting, Asheville, North Carolina.

2017: Cross Country Perspectives in Finance, Chiang Mai,, Thailand.

Invited Lecture

2023: Carleton University. Title: Gains and Losses of Investing
Sprott Finance Students; Association and Sprott Tax Students' Association

Member: Committee/Task Force

2022 – 2023: Southern Finance Association.

Other Professional Service Activities

2015: Chinese Capital Markets Conference, Winnipeg, Canada-Manitoba. Conference organizer

Reviewer: Ad Hoc Reviewer for a Journal

2023: The British Accounting Review.

2021 – 2023: Accounting & Finance.

2021 – 2023: China Finance Review International.

2021 – 2023: Journal of International Financial Markets, Institutions & Money.

2022: Financial Innovation.

2022: Journal of International Financial Management & Accounting.

2022: International Review of Financial Analysis.

2021 – 2022: Finance Research Letters.

2021: Pacific-Basin Finance Journal.

2019: Institutions and Money.

2019: Journal of International Financial Markets.

2018 – 2019: Finance Research Letters.

2018: China Finance Review.

2018: Journal of International Financial Markets, Institutions and Money.

Reviewer: Book / Textbook

2022: FlatWorld Corporate Finance.

Reviewer: Conference Paper

2023: Administrative Science Association of Canada.

Scholarly Work in Progress

Papers Under Review

Li, S. (2023). "Disagreement Exploitation and the Cross-Section of Hedge Funds Performance," Revised and resubmitted to *Financial Management Association*.

Li, S. (2023). "Does the U.S. Lead the World in the ESG Sector? Evidence and Implications," Revised and resubmitted to *Accounting & Finance*.

Jacoby, G., Li, S., & Lu, L. (2020). "Commonality in Disagreement and Stock Returns," Revised and resubmitted to *Pacific Basin Finance Journal*.

Li, S., Li, T., Mittoo, U., Song, X., & Zheng, S. X. (2018). "Valuation and Listing of Foreign Firms in U.S. Equity Markets," 1st revise and resubmit to *Journal of International Financial Markets, Institutions and Money*.

Working Papers

Li, S., Huang, W., & Xu, Y. (2023). "A study of VIX option Pricing: Based on stochastic volatility and Hawkes process."

Li, S., Huang, W., & Xu, Y. (2023). "IPO Underpricing of Secondary Market of the Registration System Reform: Evidence from the ChiNext Market."

Li, S., Huang, W., & Xu, Y. (2023). "Can Green Bond Issuance Improve Stock Market Performance of Companies? Evidence from China's A-share Market."

Li, S., Guo, F., & Hu, C. (2023). "Digital Transformation and Corporate Payroll Tax Compliance."

Li, S. (2023). "Firm-level Climate Change Exposure and Stock Price Crash Risk: International Evidence."

Li, S., Li, N., & Song, X. (2023). "Effects of Geopolitical Risk on Equity-Agricultural-Commodity Correlations."

Li, S., Gady, J., Lu, L., & Wang, Y. (2023). "The Pricing of Unexpected Dividends."

Li, S. & Wen, J. (2020). "Do Venture Capitalists Prefer Innovators or Copycats."

Jacoby, G., Li, S., Jiang, G., & Theodorides, G. (2018). "Cross-Market Liquidity Shocks: Evidence from the CDS, Corporate Bond, and Equity Markets."

Jacoby, G., Li, S., & Lu, L. (2018). "Deviation from Target Dividend Payout and the Cross-Section of Stock Returns."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	FINA5511	Investments	0.25	15	Main	100%
2024/Winter	BUSI2501	Business Finance	0.5	76	Main	100%
2024/Winter	BUSI2501	Business Finance	0.5	79	Main	100%
2024/Winter	BUSI2501	Business Finance	0.5	80	Main	100%
2024/Winter	BUSI2501	Business Finance	0.5	78	Main	100%
2024/Winter	FINA5529	Equity Analysis 2	0.25	15	Main	100%
2023/Winter	BUSI2504	Essentials of Business Finance	0.5	85	Main	100%
2023/Winter	BUSI2504	Essentials of Business Finance	0.5	86	Main	100%

2023/Winter	BUSI2504	Essentials of Business Finance	0.5	84	Main	100%
2023/Winter	BUSI2504	Essentials of Business Finance	0.5	85	Main	100%
2022/Winter	BUSI2504	Essentials of Business Finance	0.5	80	Main	100%
2022/Winter	BUSI2505	Business Finance	0.5	79	Main	100%
2022/Winter	BUSI2504	Essentials of Business Finance	0.5	80	Main	100%
2021/Fall	BUSI2505	Business Finance	0.5	84	Main	100%
2021/Winter	BUSI2504	Essentials of Business Finance	0.5	63	Main	100%
2021/Winter	BUSI2504	Essentials of Business Finance	0.5	88	Main	100%
2020/Fall	BUSI2505	Business Finance	0.5	82	Main	100%
2020/Winter	BUSI2505	Business Finance	0.5	61	Main	100%
2019/Fall	BUSI2504	Essentials of Business Finance	0.5	81	Main	100%
2019/Fall	BUSI2504	Essentials of Business Finance	0.5	44	Main	100%

Service to the institution (Academic)

University Assignments

PhD. Comprehensive Committees:

2023-2024: Thumsha Jayatilake

2023-2024: Pancheng Guo

PhD. Thesis Committees:

2020-2021: Hassan Faryaar, Economics PhD-Internal Examiner

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Selected Media Appearances: Online

2021 - The Globe and Mail, "Wealthsimple Trade becomes first broker to offer fractional share purchases in both Canadian and U.S. companies."

Credentials

Professional Memberships

American Finance Association, -

Financial Management Association, -

Southern Finance Association, -

Skills

Languages

Mandarin (native), English (fluent)

Curriculum Vitae - Sprott School of Business

Irene Lu, PhD
Associate Professor - Tenured, 2012
Sprott School of Business (Marketing)
Telephone: 613-520-2600 x2970
Email: irene.lu@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-8362-5780>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Carleton University.
Title: *Thesis Title: Latent variable modeling in business research: A comparison of regression based on IRT and CTT scores with structural equation models*
Master of Arts. Soochow University.
Bachelor of Arts. Soochow University.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (2011 - Present), Ottawa, Canada-Ontario. Marketing
Assistant Professor, Sprott School of Business, Carleton University (2008 - 2011), Ottawa, Canada-Ontario. Marketing
Assistant Professor, School of Administrative Studies, York University (2004 - 2008), Toronto, Canada-Ontario. Marketing

Other Employment

Contract Instructor, Sprott School of Business, Carleton University (2003 - 2004), Ottawa, Canada-Ontario.
Research Intern, Methodology Branch, Statistics Canada (2003 - 2004), Ottawa, Canada.
Market Researcher, Survey Research Center, United Daily News (1995 - 1998), Taipei, Taiwan.
Sessional Lecturer, Takming University of Science and Technology (1994 - 1997), Taipei, Taiwan.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		2	1	3
Articles-in-Progress (All)		2		2
Publications in Conference Proceedings (Refereed)		11	1	12
Paper Presentations (Refereed)		4	1	5
Grants - Funded (both refereed and non-refereed)		4		4
Totals		23	3	26

Refereed Scholarly Publications

Articles in Refereed Journals

Lu, I., & Kwan, E. (2023). An investigation of two remedial measures for retailers to address the impact of disease threat on sustainable consumption: A moderated moderated mediation model. *Journal of Retailing and Consumer Services*, 72, 103254. [A]
Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). Entrepreneurial Motivation in University Business Students: A Latent Profile Analysis based on Self-Determination Theory. *Entrepreneurship Research Journal*. [B]
accepted for publication; November 25, 2020
Lu, I., Kwan, E., Heslop, L. A., Thomas, D. R., & Cedzynski, M. (2019). The Ivory Tower and the Street: How researchers defined country image over four decades and what consumers think it means. *Journal of Business Research*, 105, 89-97. [A]
Li, L., Qian, G. M., & Lu, I. (2018). Aspiration, foreignness liability and market potential: how do they relate to small firms' international entrepreneurial orientation. *International Marketing Review*, 35 (6), 1009-1032. [A]

Accepted in July 2018.

Lu, I., Heslop, L., Thomas, R., & Kwan, E. (2016). An examination of the status and evolution of country image research. *International Marketing Review*, 33 (6), 825-850. [A]

Armenakyan, A., O'Reilly, N., Heslop, L., Nadeau, J., & Lu, I. (2016). It's all about my team: mega-sport events and consumer attitudes in a time series approach. *Journal of Sport Management*, 30 (6), 597-614. [A]

O'Reilly, N., Armenakyan, A., Lu, I., Nadeau, J., Heslop, L., Cakmak, E. (2016). Sport mega-events and tourism: contrasting the influence of host country and event. *International Journal of Sports Management and Marketing*, 16 (3/4/5/6), 280-296. [B]

Armenakyan, A., Heslop, L., Nadeau, J., Lu, I. R., & O'Reilly, N. (2013). Tell me who's your host and I'll tell you who you are: Olympic Games image before and after the 2008 and 2010 Olympic Games. *International Journal of Sports Management and Marketing*, 14 (1/2/3/4), 71-95. [B]

Armenakyan, A., Heslop, L., Nadeau, J., O'Reilly, N., & Lu, I. R. (2012). Does hosting the Olympic Games matter?: Canada and Olympic Games images before and after the 2010 Olympic Games. *International Journal of Sports Management and Marketing*, 12 (1/2), 111-140. [B]

Lu, I., Kwan, E., Thomas, R., & Cedzynski, M. (2011). Two New Methods for Estimating Structural Equation Models: An Illustration and a Comparison to Two Established Methods. *International Journal of Research in Marketing*, 28 (3), 258-268. [A+]

Articles in Refereed Conference Proceedings

Full Paper

Li, L., Fadaeiresketi, Y., Kwan, E., & Lu, I. (2023). Addressing food waste: An exploration of ingredient schema incongruity of upcycled foods. *Global Marketing Conference*.

Kwan, E., Lu, I., Li, L., & Fadaeiresketi, Y. (2023). Segmenting the Gen Zers based on their perceptions of repurposed products: A preliminary study. *Global Marketing Conference*.

Seoul

Lu, I. R., Kwan, E., & Buckingham, S. (2022). The Experiences of Making and Selling Repurposed Products. *American Marketing Association Summer Academic Conference*.

Kwan, E., & Lu, I. (2022). Sustainable consumption and contagion concerns: A comparison of refurbished, repurposed, and recycled products. *American Marketing Association Summer Academic Conference*.

Lu, I., Kwan, E., Li, L., & Buckingham, S. (2022). Exploring Generation Z's Value-Seeking Behaviour toward Repurposed Products. *Canadian Psychological Association Convention*.

Kwan, E., & Lu, I. (2022). The impact of Covid-19 fear on consumer attitude toward sustainable consumption. *Canadian Psychological Association Convention*.

Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). Entrepreneurial motivations in university students. *International Congress of Psychology*.

Lu, I., Kwan, E., & Buckingham, S. (2020). Exploration of the motivations in repurposing. *International Congress of Psychology*.

Prague, Czech Republic, 19-24 July, 2020. (postponed)

Lu, I., Kwan, E., & Buckingham, S. (2020). Exploring university students' perceptions of repurposed products. *Canadian Psychological Association Convention*.

Montreal, May 28-31, 2020.

Lu, I., Heslop, L. A., Brouard, F., Kwan, E., & Isabelle, D. A. (2019). Exploring the Profiles of Youth Entrepreneurial Motivation. *Academy of Marketing Conference*.

London, UK. July 2-4, 2019.

Lu, I., Heslop, L. A., Brouard, F., Kwan, E., & Isabelle, D. A. (2019). Understanding the Heterogeneity of Youth's Entrepreneurial Motivations. *Global Research Symposium on Marketing and Entrepreneurship*.

London, UK. June 27-29, 2019

Kwan, E., Lu, I., Heslop, L. A., Thomas, D. R., & Cedzynski, M. (2019). The Nature and Evolution of Country Image Definition: An Analysis of Four Decades of Research. *Academy of Marketing Conference*.

London, UK. July 2-4, 2019.

Armenakyan, A., Heslop, L., Lu, I. R., Nadeau, J., & O'Reilly, N. (2013). The Role of Expectations, Confirmation and Perceived Performance in Olympic Games Attitudes: A Cross-National Longitudinal Study. *Academy of Marketing Science (AMS) World Marketing Congress*.

Melbourne

Chen, Y. H., Wu, J., Lu, I. R., & Chien, S. (2013). Exploring Impact of E-marketplace Reputation and Reference Group on Trust of E-marketplace. *Pacific Asia Conference on Information Systems (PACIS)*.

Abstract Only

Lu, I., Kwan, E., Heslop, L., Thomas, D.R., & Cedzynski, M. (2018). How country image is defined. *International Conference and Workshop on Experiential Approach to Consumer Decision Making*.

Taichung, Taiwan.

Kwan, E., & Lu, I. (2016). A review of applications of factor analysis in psychological research. *International Congress of Psychology*.
Methodology and Statistics Track, Yokohama, Japan

Armenakyan, A., Heslop, L. A., Lu, I. R., Nadeau, J., & O'Reilly, N. (2015). Olympic Games: Does the Host Location Matter? *Academy of Marketing Science (AMS) World Marketing Congress*.
Bari, Italy

Kwan, E., & Lu, I. R. (2015). Teaching statistical inference and the null hypothesis significance controversy. *European Conference on Psychological Assessment*.

Zurich, Switzerland

Lu, I. R., Heslop, L. A., Thomas, D. R., & Kwan, E. (2015). Country Image Research Review. *Winter Marketing Educators' Conference*.
San Antonio, TX, USA

Lu, I. R., Kwan, E., Thomas, D. R., & Heslop, L. A. (2015). Assessment of consumer heterogeneity: A comparison of two multidimensional latent modeling approaches. *European Conference on Psychological Assessment*.
Zurich, Switzerland

Lu, I. R., Heslop, L., Thomas, D. R., & Kwan, E. (2014). Country Image Research: A Content Analysis. *European International Business Academy (EIBA) Annual Conference*.
Uppsala, Sweden

Lu, I. R., Heslop, L. A., Thomas, D. R., & Kwan, E. (2014). Country-of-Origin Research: Publication and Methodology Trends over the Past 35 Years. *Consortium for International Marketing Research (CIMaR) Conference*.
Victoria, BC, Canada

Chen, Y. H., Lu, I. R., Kwan, E., & Chuang, J. (2012). Exploring antecedents of B2B trust: A study of e-marketplace participants. *International Conference on e-Commerce, e-Administration, e-Society, e-Education, and e-Technology (e-CASE & e-Tech)*.
Hong Kong, People's Republic of China

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Kwan, E. & Lu, I. (2022). *The impact of Covid-19 fear on consumer attitude toward sustainable consumption*. Canadian Psychological Association Convention, Calgary, Canada-Alberta.

Kwan, E. & Lu, I. (2022). *Sustainable consumption and contagion concerns: A comparison of refurbished, repurposed, and recycled products*. American Marketing Association Summer Academic Conference, Chicago, Illinois.

Lu, I. R., Kwan, E., & Buckingham, S. (2022). *The Experiences of Making and Selling Repurposed Products*. American Marketing Association Summer Academic Conference, Chicago, Illinois.

Lu, I., Kwan, E., Li, L., & Buckingham, S. (2022). *Exploring Generation Z's Value-Seeking Behaviour toward Repurposed Products*. Canadian Psychological Association Convention, Calgary, Canada-Alberta.

Lu, I., Kwan, E., Heslop, L., Brouard, F., & Isabelle, D. (2021). *Entrepreneurial motivations in university students*. International Congress of Psychology, Prague, Czech Republic.

Lu, I., Kwan, E., Heslop, L., & Thomas, D. R. (2018). *How country image is defined*. International Conference and Workshop on Experiential Approach to Consumer Decision Making, Taichung, Taiwan.

Contract or Other Research

Research Grants and Awards

Grants

2023 [Year 3 of 3]: Lu, I. Insight Development Grant (\$19,564.00 of a total grant amount of \$58,692.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 2 of 3]: Lu, I. Insight Development Grant (\$19,564.00 of a total grant amount of \$58,692.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 1 of 3]: Lu, I. Insight Development Grant (\$19,564.00 of a total grant amount of \$58,692.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020: Lu, I. & Kwan, E., CU COVID-19 Rapid Research Response Grants (\$11,491.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2014: Lu, I. General Research Fund (SSHRC) (\$27,214.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Advisor

2020 – 2021: Wiley Advisory Panel.

Board of Directors: Substantial Involvement

2010 – 2011: Administrative Sciences Association of Canada (ASAC). Vice President Membership

Chair: Conference / Track / Program

2022: American Marketing Association Summer Academic Conference.

Other Professional Service Activities

2014: Hong Kong Research Grant Council Grant. External Referee for International Research Grant Application. Review for Lingnan University, Hong Kong

2014: Swiss National Science Foundation. External Referee for International Research Grant Application

Reviewer - External Tenure

2022: School of Management and Marketing, Curtin University. Candidate: Michael Baird, the School of Management and Marketing, Curtin University, Australia

2021: Mingming Cheng, the School of Management and Marketing, Curtin University, Australia.

2012: Ying (Annie) Jiang, Faculty of Business and Information Technology, University of Ontario Institute of Technology, Oshawa, Canada-Ontario.

Reviewer: Ad Hoc Reviewer for a Journal

2023 – 2024: Journal of Business Ethics.

2020 – 2021: Canadian Journal of Administrative Sciences.

2020: International Marketing Review.

2020: Multidisciplinary Business Review.

2018: International Marketing Review.

2018: International Marketing Review.

2017: Place Branding and Public Diplomacy.

2016: International Marketing Review.

2015: Educational and Psychological Measurement.

2014: Asian Journal of Management Science and Applications.

2012: International Journal of Research in Marketing.

2010: Electronic Commerce Research and Applications.

Reviewer: Book / Textbook

2020: Marketing: Principle and Practice. Marketing: Principle and Practice David Brown, Susanne Durst, Alex Thompson and Irute Karanicholas, Red Globe Press.

2018: Consumer Behaviour in Action. Ling, D'Alessandro, and Winzar, Consumer Behaviour in Action, Oxford University Press Canada

2017: Marketing: An Introduction by Armstrong. 6Ce, Pearson Canada

2016: Consumer Behaviour by Szmigin and Piacentini. Oxford University Press Canada

2016: Consumer Behaviour in Action by Ling, D'Alessandro, and Winzar. Oxford University Press Canada

2010: Marketing by Crane, Frederick G., Roger A. Kerin, Steven W. Hartley, and William Rudelius. 8th Canadian Edition. Toronto: McGraw-Hill Ryerson.

2010: Marketing by Grewal, Dhruv and Levy, Michael. 2nd Canadian Edition. Toronto: McGraw-Hill Ryerson.

Reviewer: Conference Paper

2022 – 2024: American Marketing Association Winter Academic Conference.

2023: Global Marketing Conference.

2020 – 2023: American Marketing Association Summer Academic Conference.

2022: American Marketing Association Winter Academic Conference.

2021 – 2022: American Marketing Association Winter Academic Conference.

2020 – 2021: American Marketing Association Winter Academic Conference.

2019: Academy of Marketing Conference.

2019: American Marketing Association Winter Conference.

2016 – 2017: European Marketing Academy.

2014: European International Business Academy.

2013: Pacific Asia Conference on Information Systems (PACIS).

2012: Administrative Sciences Association of Canada (ASAC).

2011: Academy of Marketing Science (AMS) Annual Conference. Global Marketing Track

2010: Sprott PhD Symposium, Ottawa, Canada-Ontario.

2010: Administrative Sciences Association of Canada (ASAC).

2010: Pacific Asia Conference on Information Systems (PACIS).

Scholarly Work in Progress

Papers Under Review

Lu, I., Kwan, E., Heslop, L., Thomas, D. R., & Cedzynski, M. (2018). "Definitions of country image in academia: An analysis of four decades of research and a comparison to definitions from the general population," Initial submission to *European Journal of Marketing*.

Isabelle, D., Brouard, F., Lu, I., & Heslop, L. A. (2018). "An Integrative Framework for Studying Students' Attitudes toward Entrepreneurship," Initial submission to *Entrepreneurship, Theory and Practice*.

Working Papers

Isabelle, D., Brouard, F., Lu, I., & Heslop, L. A. (2019). "An Integrative Framework for Studying Students' Attitudes toward Entrepreneurship."

Lu, I., Kwan, E., Heslop, L. A., Brouard, F., & Isabelle, D. (2019). "An examination of youth entrepreneurial motivation based on self-determination theory and latent profile analysis."

Lu, I. & Kwan, E. (2017). "Teaching statistical inference and the null hypothesis significance controversy."

Lu, I., Heslop, A., Thomas, D. R., & Kwan, E. (2017). "The meaning(s) and measurement of country image: A mixed method analysis," targeted for *International Marketing Review*.

Lu, I., McNeish, J., & Heslop, L. H. (2017). "Why do online consumers use both paper bills and e-bills."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI6201	Seminar in Marketing II	0.25	1	Main	50%
2023/Fall	BUSI4219	Sustainability Marketing	0.5	50	Main	100%
2023/Fall	BUSI4203	Marketing: Not-for-Profit Organizations	0.5	42	Main	100%
2023/Fall	BUSI4201	Marketing Metrics	0.5	46	Main	100%
2023/Fall	BUSI3209	Consumer Behaviour	0.5	59	Main	100%
2022/Fall	BUSI4219	Sustainability Marketing	0.5	41	Main	100%
2022/Fall	BUSI4201	Marketing Metrics	0.5	45	Main	100%
2022/Fall	BUSI3209	Consumer Behaviour	0.5	58	Main	100%
2022/Summer	BUSI6901	Qualitative Research Design	0.5	5	Main	100%
2022/Winter	BUSI4901	Selected Topics in Management I	0.5	24	Main	100%
2022/Winter	BUSI6201	Seminar in Marketing II	0.2	4	Main	40%
2022/Winter	BUSI5281	Seminar in Marketing II: Consumer Behaviour	0.05	1	Main	10%
2021/Fall	BUSI2208	Introduction to Marketing	0.5	74	Main	100%
2021/Fall	BUSI4201	Marketing Metrics	0.5	51	Main	100%
2021/Fall	BUSI3209	Consumer Behaviour	0.5	60	Main	100%
2021/Summer	BUSI2208	Introduction to Marketing	0.5	34	Main	100%
2021/Winter	BUSI6200	Seminar in Marketing I	0.34	4	Main	100%
2021/Winter	BUSI5280	Seminar in Marketing I: Management and Strategy	0.16	2	Main	100%

2020/Fall	BUSI4201	Marketing Metrics	0.5	50	Main	100%
2020/Fall	BUSI3209	Consumer Behaviour	0.5	60	Main	100%
2020/Fall	BUSI2208	Introduction to Marketing	0.5	78	Main	100%
2019/Winter	BUSI2208	Introduction to Marketing	0.5	76	Main	100%
2019/Winter	BUSI2208	Introduction to Marketing	0.5	33	Main	100%
2018/Fall	BUSI3209	Consumer Behaviour	0.5	57	Main	100%
2018/Fall	BUSI2208	Introduction to Marketing	0.5	82	Main	100%
2018/Fall	BUSI4201	Marketing Metrics	0.5	30	Main	100%
2018/Summer	BUSI2204	Basic Marketing	0.5	58	Main	100%
2018/Winter	BUSI2208	Introduction to Marketing	0.01	2	Main	2%
2018/Winter	BUSI2208	Introduction to Marketing	0.12	6	Main	24%
2018/Winter	BUSI2208	Introduction to Marketing	0.49	78	Main	98%
2018/Winter	BUSI2208	Introduction to Marketing	0.38	19	Main	76%
2017/Fall	BUSI4901	Selected Topics in Management I	0.5	35	Main	100%
2017/Fall	BUSI3209	Consumer Behaviour	0.5	62	Main	100%
2017/Summer	BUSI2208	Introduction to Marketing	0.5	40	Main	100%
2017/Winter	BUSI4901	Selected Topics in Management I	0.5	7	Main	100%
2017/Winter	BUSI4206	Consumer Behaviour	0.5	51	Main	100%
2016/Fall	BUSI4206	Consumer Behaviour	0.5	51	Main	100%
2016/Fall	BUSI2208	Introduction to Marketing	0.5	39	Main	100%
2016/Fall	BUSI2208	Introduction to Marketing	0.5	77	Main	100%
2016/Winter	BUSI2208	Introduction to Marketing	0.12	13	Main	24%
2016/Winter	BUSI2208	Introduction to Marketing	0.5	56	Main	100%
2016/Winter	BUSI2208	Introduction to Marketing	0.38	42	Main	76%
2016/Winter	BUSI2208	Introduction to Marketing	0.5	88	Main	100%
2015/Fall	BUSI2208	Introduction to Marketing	0.05	9	Main	10%
2015/Fall	BUSI2208	Introduction to Marketing	0.05	9	Main	10%
2015/Fall	BUSI2208	Introduction to Marketing	0.5	74	Main	100%
2015/Fall	BUSI2208	Introduction to Marketing	0.45	79	Main	90%
2015/Fall	BUSI2208	Introduction to Marketing	0.45	81	Main	90%
2015/Summer	BUSI2204	Basic Marketing	0.5	49	Main	100%
2015/Summer	BUSI2208	Introduction to Marketing	0.5	56	Main	100%

Service to the institution (Academic)

University Assignments

PhD. Comprehensive Committees:

2023-2024: Yalda Fadaeiresketi

PhD. Thesis Committees:

2023-2024: Muge Bakkalogu

2023-2024: Narmin Bannu

University Assignments

PhD. Thesis Committees:

2023-2024: Pourya Parsaei

University Assignments

PhD. Thesis Committees:

2021-2022: Samantha Hollingshead, Department of Psychology, CU

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2023-2024: CTPC Tenure and Promotion Committee - Departmental (Cluster I)

2016-2017: Tenure and Promotion Committee - Departmental (Cluster I)

Credentials

Professional Memberships

Administrative Sciences Association of Canada, N/A

American Statistical Association, N/A

European Association of Methodology, N/A

European Marketing Academy, N/A

International Centre for Anti-Consumption Research, N/A

Psychometric Society, N/A

Professional Development

Professional Seminars / Workshops

2010: Teaching with Technology Roundtable, Educational Development Centre, Carleton University. Participant, "An Academic's Use of an iPad",
Teaching with Technology Roundtable (1 hour), Educational Development Centre, Carleton University

Curriculum Vitae - Sprott School of Business

Michael McIntyre, PhD
Full Professor - Tenured, 2003
Sprott School of Business (Finance)
Telephone: 613-520-2600 x2514
Email: michael.mcintyre@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-6112-1330>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Queen's University.
Title: *A Specification Test of Stochastic Processes Inferred From Option Prices* Supervisor: S. M. Turnbull.
Master of Business Administration. York University.
Bachelor of Commerce. Queen's University.

Professional Certifications

Canadian Securities Course, 1989
Chartered Accountant (CA), 1977

B. EMPLOYMENT

Academic Appointments

Professor, Sprott School of Business, Carleton University (July, 2019 - Present), Ottawa, Canada-Ontario.
Associate Professor, Sprott School of Business, Carleton University (2007 - June, 2019), Ottawa, Canada-Ontario.
Assistant Professor, Sprott School of Business, Carleton University (2003 - 2007), Ottawa, Canada-Ontario. Tenured
Assistant Professor, Sprott School of Business, Carleton University (2000 - 2003), Ottawa, Canada-Ontario.
Assistant Professor, University of Toronto (1998 - 2000), Toronto, Canada-Ontario.
Lecturer, University of Toronto (1996 - 1998), Toronto, Canada-Ontario.

Other Employment

N/A, The Bank of Nova Scotia (1983 - 1991), N/A, Unknown. Credit assessment and management, loan workouts, corporate finance, mergers and acquisitions
N/A, Coopers & Lybrand (1975 - 1983), N/A, Unknown. Audit, insolvency, and financial investigations

C. PROFESSIONAL HONOURS

2016: Highly Commended Paper, Emerald Literati Network Awards for Excellence. McIntyre, M. L., S. A. Murphy and C. A. Tetraault Sirsly, 2015. Do Firms Seek Social License to Operate When Stakeholders are Poor? Evidence from Africa. *Corporate Governance: The international journal of business in society* 15(3), pp. 306-314. .

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	3	5		8
Articles-in-Progress (All)	2	9		11
Paper Presentations (Refereed)		2		2
Totals	5	16		21

Refereed Scholarly Publications

Articles in Refereed Journals

McIntyre, M., Hodgkinson, T., & Caputo, T. (2023). Strategic planning practices in policing: evidence from the field. *Policing: An International Journal*, 46 (5/6), 795-810. [B]
McIntyre, M. (2023). A characterization of the Lender's position in the context of contractual loan conditions. *SN Business and Economics*, 3 (157).

[C,Other]

McIntyre, M. (2022). Capital Structure in an Option Theoretic Setting. *SN Business and Economics*, 2 (109), 1-24. [C,Other]

Zhang, Y., & McIntyre, M. (2021). Discretionary Loan Loss Provisioning and Stock Trading Liquidity. *Journal of Banking Regulation*, 22 (2), 97-111.

[B]

2022 Update: Published with DOI and volume

Accepted for publication July 14, 2020

McIntyre, M., Caputo, T., Hodgkinson, L., Wang, L., & Davidson, R. (2021). Using Organizational Performance Assessment to Improve Service to the Community. *Police Practice and Research*. [B,Other]

Forthcoming, Accepted for publication July 12, 2020

Zhang, Y., & McIntyre, M. (2020). Depositors' Discipline, Banks' Accounting Discretion, and Depositors' Expectations of Implicit Government Guarantees. *Journal of Banking Regulation*, 21 (3), 256-277. [B]

Original Article First Online: 26 July 2019

Rogers, Z., McIntyre, M., & Caputo, T. (2020). Gold Standard Strategic Plans: How well do Canadian police services do? *Police Practice and Research*, 21 (3), 210-226. [B,Other]

Volume assigned in 2020

ONLINE Received 05 Feb 2018, Accepted 22 Dec 2018, Published online: 28 Jan 2019

Forthcoming. Submitted February 5, 2018; revised and resubmitted June 12, 2018; revised and resubmitted September 10, 2018;

Accepted for publication December 22, 2018

Australia and New Zealand Society of Criminology journal ranking: B

Hodgkinson, T., Caputo, T., & McIntyre, M. (2019). Beyond crime rates and community surveys: a new approach to police accountability and performance measurement. *Crime Science*, 8 (13). [A,Other]

Open Access

Caputo, T., McIntyre, M., Wang, L., & Hodgkinson, T. (2018). Assessing What Police Officers Do. *Policing: An International Journal*, 41 (1), 70-83. [B]

McIntyre, M., T., C., & Murphy, S. A. (2017). The Inescapably Ethical Foundation of Sustainability. *International Journal of Business Governance and Ethics*, 12 (2), 127-150. [B]

McIntyre, M. L., & Murphy, S. A. (2016). The Theory of Practice and the Practice of Theory. *Industry and Higher Education*, 30 (2), 109-115. [C]

Forthcoming.

McIntyre, M. L., Caputo, T., & Murphy, S. (2016). Sustainability and Large Corporations. *International Journal of Business Governance and Ethics*, 11 (2), 159-182. [B]

Caputo, T., & McIntyre, M. L. (2015). Addressing role and value in policing: toward a sustainable policing framework. *Policing: An International Journal*, 38 (2), 265-278. [B]

McIntyre, M. L., & Stan, M. (2015). Thoughts on Bank Risk Measurement for Deposit Insurers. *Academy of Accounting and Financial Studies Journal*, 19 (2), 167-189. [C]

Title: Estimating Risk in Banks; What Can Academic Research Tell Us?

McIntyre, M. L., Murphy, S. A., & Tetrault-Sirsly, C. (2015). Do Firms Seek Social License to Operate When Stakeholders are Poor? Evidence from Africa. *Corporate Governance: the international journal of business in society*, 15 (3), 306-314. [B]

McIntyre, M. L., & Caputo, T. (2015). Creating Successful and Sustainable Organizations with Change is Difficult: An Example from Policing: Contemporary Challenges for Essential Service Providers. *Organizational Cultures: An International Journal*, 14 (2), 17-30.

McIntyre, M. L., Murphy, S. A., & Funston, B. (2012). If Not Growth, Then What? *International Journal of Business Governance and Ethics*, 7 (2), 96-117. [B]

McIntyre, M. L., & Murphy, S. A. (2012). The Role of Information and Communications Technology on Moral Agents and Governance in Society. *Corporate Governance: the international journal of business in society*, 12 (5), 616-628. [B]

Stan, M., & McIntyre, M. L. (2012). Too Big to Fail? Size and Risk in Banking. *Academy of Banking Studies Journal*, 11 (2), 11-22.

McIntyre, M. L., & Murphy, S. A. (2011). Sustainable Corporate Strategy: Who's Sustaining What? *International Journal of Environmental, Cultural Economic and Social Sustainability*, 7 (3), 409-426. [C]

Stan, M., & McIntyre, M. L. (2011). The Relative Riskiness of Various Asset Focus Alternatives in Banking. *International Research Journal of Applied Finance*, 2 (2), 144-179. [BL,Cabells]

Articles in Refereed Conference Proceedings

Full Paper

McIntyre, M., Tripe, D., & Chen, F. (2014). Does a Failure of Governance Really Matter? Stock Price Evidence from Australia. *New Zealand Finance Colloquium*.

McIntyre, M., & Stan, M. (2010). The Relative Riskiness of Banks with Switching Strategies. *Athens Institute for Education and Research Conference*.

Chapters in Edited Books

McIntyre, M. L., & Murphy, S. A. (2014). Sustainable corporate strategy: Who's sustaining what?. In Humphreys, D. and S. Stober (Eds.), *Transitions to Sustainability: Theoretical Debates for a Changing Planet* (pp. 360). Champaign, IL: Common Ground. [Status: Published]

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Guest Editor of Journal

2010: Regulatory Governance Brief, School of Public Policy and Administration, Ottawa, Canada-Ontario (Local). Carleton University, January 2010 Issue.

Editor: Special Issue of a PRJ

2015: International Journal of Environmental, Cultural, Economic and Social Sustainability (International). Annual Review, Volume 11, 2015.

Presentations

Papers Presented at Conferences

Refereed

Hodgkinson, T., Caputo, T., & McIntyre, M. (2020). *Improving police performance: A test of the CIV tool*. Applied Research in Crime and Justice Conference, Brisbane, Australia.

Description: Brisbane, Queensland, 12-13 February 2020. Presented by T. Hodgkinson

Hodgkinson, T., McIntyre, M., & Caputo, T. (2020). *Implementation of Best Practices in Strategic Planning: Evidence from the Field*. International Conference on Knowledge, Culture, and Change in Organizations, Chicago, Illinois.

Description: May 27-28, 2020. Accepted for presentation

Hodgkinson, T., Caputo, T., & McIntyre, M. (2018). *Performance Measurement in the Public Sector: Myths and Misconceptions*. International Conference on Knowledge, Culture, and Change in Organizations, Konstanz, Germany.

Description: March 15-16, University of Konstanz, Konstanz,

Hodgkinson, T., Caputo, T., & McIntyre, M. (2018). *Successful and Sustainable Partnerships: Lessons Learned about Multi-Sector/Multi-Agency Collaborations*. International Conference on Knowledge, Culture, and Change in Organizations, Konstanz, Germany.

Description: Presented by T. Caputo, March 15-16, University of Konstanz.

Caputo, T., McIntyre, M., & Hodgkinson, T. (2017). *Executive Education and Development: Finding a Balance between Theoretical Knowledge and Skills Training*. International Conference on Knowledge, Culture, and Change in Organizations, Darwin, Australia.

Description: Held at Charles Darwin University, Darwin, Australia, April 20-21, 2017.

Hodgkinson, T., Caputo, T., & McIntyre, M. (2017). *All Together Now: Community Safety Through Policing Partnerships*. American Society of Criminology, Philadelphia, Pennsylvania.

Description: November 15-18, 2017

Hodgkinson, T., Caputo, T., & McIntyre, M. (2017). *Improving Police Performance: A Test of the CIV Tool in a Canadian Police Service*. American Society of Criminology, Philadelphia, Pennsylvania.

Description: November 15-18, 2017

Caputo, T., McIntyre, M., & Rogers, Z. (2016). *Strategic Planning in Public and Non-profit Organizations: Lessons for Uncertain Times*. International Conference on Knowledge, Culture and Change in Organizations, Honolulu, Hawaii.

Description: University of Hawaii, April 19-20.

Caputo, T., McIntyre, M., & Hodgkinson, T. (2016). *Metrics, Murder Rates, and Myths: Communicating Value in a Competitive Environment*. International Conference on Knowledge, Culture and Change in Organizations, Honolulu, Hawaii.

Description: University of Hawaii, April 19-20.

McIntyre, M., Caputo, T., & Murphy, S. (2015). *Sustainable Corporate Strategy: Virtuous, Specious, Vacuous or Disingenuous?* International Conference on Knowledge, Culture and Change in Organizations, Berkeley, California.

Description: University of California, Berkeley; February 19-20

McIntyre, M., Tripe, D., & Chen, F. (2014). *Does a Failure of Governance Really Matter? Stock Price Evidence from Australia*. New Zealand Finance Colloquium, Auckland CBD, New Zealand.

Description: Faculty of Business and Law, Auckland University of Technology, 13-14 February 2014

McIntyre, M. & Caputo, T. (2014). *Sustainable Policing in Canada*. International Conference on Knowledge, Culture and Change in Organizations, Oxford, United Kingdom.

Description: University of Oxford, August 4-5

McIntyre, M. & Stan, M. (2010). *The Relative Riskiness of Banks with Switching Strategies*. Athens Institute for Education and Research Conference,

Athens, Greece.

Other Presentations

Invited Lecture

2021: Working Group on Deposit Insurance Development, Government of the British Virgin Islands.

Presentation

2019: Canadian Association of Police Governance Annual Conference, Calgary, Canada-Alberta. Caputo, T., T. Hodgkinson and M. L. McIntyre, 2019. Gold Standard Strategic Plans: Lessons From a Survey of CAPG Members. Canadian Association of Police Governance Annual Conference, August 9 to 11, 2019, Calgary, Alberta. (Presented by T. Caputo)

2018: Canadian Association of Police Governance Annual Conference, Winnipeg, Canada-Manitoba. Caputo, T. and M. L. McIntyre, 2018. Strategic Planning for Police Services: Do you have the right plan? Canadian Association of Police Governance Annual Conference, August 9, 2018,

2017: Calgary Police Service Executive, Calgary, Canada-Alberta. McIntyre, M. L. and T. Caputo, 2017. Sustainable Policing and the Future of Policing in Canada. February 6, 2017.

2017: Governance Sub-Committee of the Ottawa Police Services Board, Ottawa, Canada-Ontario. McIntyre, M. L. and T. Caputo, 2017. Strategic Planning in Policing Organizations: Applying the Sustainable Policing Framework, December 12, 2017

2015: Canadian Police College. With T. Caputo

2014: Public Safety Canada. McIntyre, M. L. and T. Caputo, 2014. The Sustainable Policing Framework, June 11, 2014.

2014: Ontario Provincial Police Commissioned Officers Conference,. With T. Caputo, May 27, 2014.

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 4 of 4]: McIntyre, M. Insight Grant (\$19,724.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 3 of 4]: McIntyre, M. Insight Grant (\$19,724.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 3 of 3]: McIntyre, M. Partnership Development Grant, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 3 of 3]: McIntyre, M. Insight Grant (\$215,605.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 2 of 4]: McIntyre, M. Insight Grant (\$19,724.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 2 of 3]: McIntyre, M. Partnership Development Grant, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 2 of 3]: McIntyre, M. Insight Grant (\$215,605.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 1 of 4]: McIntyre, M. Insight Grant (\$19,724.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2020 [Year 1 of 3]: McIntyre, M. Partnership Development Grant, Grantee, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2020 [Year 1 of 3]: McIntyre, M. Insight Grant (\$215,605.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2020: McIntyre, M. Partnership Engage Grant (\$24,785.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2020: McIntyre, M. Partnership Engage Grant (\$2,000.00 Not Funded), Principal Investigator, Canadian Association of Police Governance. [Status: Not Funded]

2019 [Year 1 of 5]: McIntyre, M. Insight Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2018 [Year 1 of 5]: McIntyre, M. Insight Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Invited Lecture

2021: Working Group on Deposit Insurance Development, Government of the British Virgin Islands.

Officer: Organization / Association

2010 – 2012: Ottawa Chapter of Profession Risk Managers International Association, Ottawa, Canada-Ontario. Co-Director

Reviewer: Ad Hoc Reviewer for a Journal

2023: South Asian Journal of Business.

2022: SN Business and Economics.

2020 – 2021: International Journal of Business, Governance and Ethics.

2020: Journal of Banking Regulation.

2020: Policing & Society.

2015 – 2019: Corporate Governance: The international journal of business in society.

2018: International Journal of Business, Governance and Ethics.

2017: Industry and Higher Education.

2016 – 2017: International Journal of Business Governance and Ethics.

2016: International Journal of Manpower.

2015 – 2016: Common Ground Publishing Team.

2015: Canadian Investment Review.

2014: On the Organization.

2013: Corporate Governance: The international journal of business in society.

2012: International Journal of Business Governance and Ethics.

2012: International Journal of Management Accounting Research.

2011: Corporate Governance: The international journal of business in society.

2011: South Asian Journal of Global Business Research.

Scholarly Work in Progress

Papers Under Review

Hodgkinson, T., McIntyre, M., & Caputo, T. (2022). "Implementation of Best Practices in Strategic Planning: Evidence from the Field.," Initial submission.

Zhang, Y. & McIntyre, M. (2019). "Estimating Financial Sector Risk Spillover: A Conditional Value-at-Risk Approach," Initial submission to *Applied Economics*.

Zhang, Y. & McIntyre, M. (2019). "Discretionary Loan Loss Provisioning and Stock Trading Liquidity (Essay 1)," Initial submission to *Journal of Banking Regulation*.

McIntyre, M., Caputo, T., Davidson, R., Hodgkinson, T., & Wang, L. (2019). "Using Organizational Performance Assessment to Improve Service to the Community," Initial submission to *Police Practice and Research*.

Hodgkinson, T., Caputo, T., & McIntyre, M. (2018). "Beyond Crime Rates and Community Surveys: A Networked Governance Approach to Police Accountability and Performance Measurement," Initial submission to *International Journal of Police Science & Management*.

Working Papers

McIntyre, M. (2023). "Monte Carlo Examination of the Relationship Between CAPM Betas and Observed Returns."

McIntyre, M. (2022). "Business-Unit Strategy-Setting for Policing Organizations.."

McIntyre, M. (2020). "Comparison of Visualizations of Volatility Surfaces Across Competing Option Pricing Models."

O'Farrell, D. & McIntyre, M. (2019). "Separating jumps from diffusions in the stochastic evolution of asset prices – an option theoretic approach."

Bird, A. & McIntyre, M. (2019). "An option hedging based test for jumps in the stochastic evolution of cryptocurrency prices."

Hodgkinson, T., McIntyre, M., & Caputo, T. (2019). "Implementation of Best Practices in Strategic Planning: Evidence from the Field."

Zhang, Y. & McIntyre, M. (2019). "Estimating Financial Sector Risk Spillover: A Conditional Value-at-Risk Approach."

Zhang, Y. & McIntyre, M. (2018). "Spillover effects from financial sector to real sectors: a conditional Value-at-Risk approach."

Zhang, Y. & McIntyre, M. (2018). "Depositors' discipline, banks' accounting discretion, and depositors' expectations of implicit government guarantees."

Zhang, Y. & McIntyre, M. (2018). "Discretionary Loan loss provisioning and bank opacity features."

McIntyre, M. (2017). "An analysis of the dynamic properties of risky debt.."

McIntyre, M. (2017). "An analysis of the dynamic properties of risky debt."

McIntyre, M. & Caputo, T. (2017). "Critical Analysis of Strategic Assessment in Canadian Policing."

Rogers, Z., McIntyre, M., & Caputo, T. (2017). "A Content Review of Publicly Available Statements of Strategic Intent in Canadian Policing."

Description: Working Paper

McIntyre, M. (2016). "Weighted Average Cost of Capital in a State Claim Setting."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI6501	Seminar in Finance II: Theories and Empirical Methods in Corporate Finance	0.5	3	Main	100%
2023/Fall	BUSI6500	Seminar in Finance I	0.5	7	Main	100%
2023/Fall	BUSI5580	Seminar in Finance I	0.5	1	Main	100%
2023/Winter	BUSI6501	Seminar in Finance II: Theories and Empirical Methods in Corporate Finance	0.25	1	Main	100%
2023/Winter	BUSI5581	Seminar in Finance II: Theories and Empirical Methods in Corporate Finance	0.25	1	Main	100%
2022/Fall	BUSI6500	Seminar in Finance I	0.25	1	Main	100%
2022/Fall	BUSI5580	Seminar in Finance I	0.25	1	Main	100%
2022/Winter	BUSI6501	Seminar in Finance II: Theories and Empirical Methods in Corporate Finance	0.44	7	Main	88%
2022/Winter	BUSI5581	Seminar in Finance II: Theories and Empirical Methods in Corporate Finance	0.06	1	Main	12%
2021/Fall	FINA5514	Micro Finance	0.25	11	Main	100%
2021/Fall	BUSI6500	Seminar in Finance I	0.5	15	Main	100%
2021/Fall	BUSI2504	Essentials of Business Finance	0.5	75	Main	100%
2020/Fall	BUSI6501	Seminar in Finance II: Theories and Empirical Methods in Corporate Finance	0.5	7	Main	100%
2020/Fall	BUSI4504	International Finance	0.5	58	Main	100%
2020/Fall	BUSI2504	Essentials of Business Finance	0.5	82	Main	100%
2019/Fall	FINA5514	Micro Finance	0.25	20	Main	100%
2019/Fall	BUSI6500	Seminar in Finance I	0.3	3	Main	60%
2019/Fall	BUSI5580	Seminar in Finance I	0.2	2	Main	40%
2019/Fall	BUSI2504	Essentials of Business Finance	0.5	89	Main	100%
2019/Fall	BUSI2504	Essentials of Business Finance	0.5	68	Main	100%
2018/Fall	BUSI2504	Essentials of Business Finance	0.5	83	Main	100%
2018/Fall	BUSI6501	Seminar in Finance II: Theories and Empirical Methods in Corporate Finance	0.5	5	Main	100%
2018/Fall	BUSI2504	Essentials of Business Finance	0.5	65	Main	100%
2018/Winter	FINA5502	Corporate Finance	0.25	23	Main	100%
2018/Winter	FINA5502	Corporate Finance	0.25	35	Main	100%
2017/Fall	BUSI6500	Seminar in Finance I	0.5	4	Main	100%
2017/Fall	BUSI2504	Essentials of Business Finance	0.08	10	Main	17%
2017/Fall	BUSI2504	Essentials of Business Finance	0.05	1	Main	11%
2017/Fall	BUSI2504	Essentials of Business Finance	0.42	75	Main	83%
2017/Fall	BUSI2504	Essentials of Business Finance	0.45	59	Main	89%
2016/Fall	BUSI2504	Essentials of Business Finance	0.5	66	Main	100%
2016/Fall	BUSI2504	Essentials of Business Finance	0.5	58	Main	100%
2016/Fall	BUSI6501	Seminar in Finance II: Theories and Empirical Methods in Corporate Finance	0.5	4	Main	100%

2016/Fall	BUSI4504	International Finance	0.5	74	Main	100%
2015/Fall	BUSI2504	Essentials of Business Finance	0.5	88	Main	100%
2015/Fall	BUSI3512	Derivatives	0.13	5	Main	25%
2015/Fall	BUSI2504	Essentials of Business Finance	0.07	12	Main	13%
2015/Fall	BUSI3512	Derivatives	0.5	54	Main	100%
2015/Fall	BUSI3512	Derivatives	0.38	15	Main	75%
2015/Fall	BUSI2504	Essentials of Business Finance	0.43	79	Main	87%

Service to the institution (Academic)

University Assignments

PhD. Comprehensive Committees:

2023-2024: Bertrand Lemieux

2023-2024: Anamika Jayendran

PhD. Thesis Committees:

2020-2021: Shawn Tan, Cognitive Science, Carleton University

2020-2021: Shawn Tan, Cognitive Science

2019-2020: Lenda Al Saeab, Civil Engineering

2018-2019: Internal-External Examiner, Timothy Grieder

2011-2012: Internal-external examiner, Mitch Murphy

External Committees

Thesis Assignments

PhD. Thesis Committees:

2014-2015: External examiner, Ding Ding,

2012-2013: External examiner, Azira Abdul-Adzis

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: CTPC II Committee

2019-2020 – 2020-2021: Sprott Unit Standards Review Committee (Co-Chair)

H. OTHER

Student Experience Activities

2018 - Judge, Sprott DECA Case Competition

Student Recruitment/Outreach Activities

2018 - Careers in Finance, Ashbury College : Approximately 10 guest appearances in a careers class

Credentials

Skills

Languages

Language Proficiency: English

Service to the Community

Positions Held in Civic Organizations

2023: Government of the British Virgin Islands - Advisory, Prepared and presented 14 sole-authored advisory reports to assist with deposit insurer policy development for the governments of Canada, Malaysia, The Bahamas and the British Virgin Islands, respectively, 2003 to the present.

2022: Government of the British Virgin Islands - Advisory, Prepared and presented 14 sole-authored advisory reports to assist with deposit insurer policy development for the governments of Canada, Malaysia, The Bahamas and the British Virgin Islands, respectively, 2003 to the present.

2021: Government of the British Virgin Islands - Advisory, Prepared and presented 14 sole-authored advisory reports to assist with deposit insurer policy development for the governments of Canada, Malaysia, The Bahamas and the British Virgin Islands, respectively, 2003 to the present.

2020: Government of the British Virgin Islands - Advisory, Prepared and presented 14 sole-authored advisory reports to assist with deposit insurer policy development for the governments of Canada, Malaysia, The Bahamas and the British Virgin Islands, respectively, 2003 to the present.

2019: Government of the British Virgin Islands - Advisory, Prepared and presented 14 sole-authored advisory reports to assist with deposit insurer policy development for the governments of Canada, Malaysia, The Bahamas and the British Virgin Islands, respectively, 2003 to the present.

2018: Government of the British Virgin Islands - Advisory, Prepared and presented 14 sole-authored advisory reports to assist with deposit insurer policy development for the governments of Canada, Malaysia, The Bahamas and the British Virgin Islands, respectively, 2003 to the present.

2017: Government of the British Virgin Islands - Advisory, Prepared and presented 14 sole-authored advisory reports to assist with deposit insurer policy development for the governments of Canada, Malaysia, The Bahamas and the British Virgin Islands, respectively, 2003 to the present.

2016: Government of the British Virgin Islands - Advisory, Prepared and presented 14 sole-authored advisory reports to assist with deposit insurer policy development for the governments of Canada, Malaysia, The Bahamas and the British Virgin Islands, respectively, 2003 to the present.

2015: Government of the British Virgin Islands - Advisory, Prepared and presented 14 sole-authored advisory reports to assist with deposit insurer policy development for the governments of Canada, Malaysia, The Bahamas and the British Virgin Islands, respectively, 2003 to the present.

Curriculum Vitae - Sprott School of Business

Ruth McKay, PhD
Associate Professor - Tenured, 2007
Sprott School of Business (Management and Strategy)
Telephone: 613-520-2600 x6013
Email: ruth.mckay@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-7400-0044>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. York University.
Title: *Interorganization responses: A qualitative study of a new environmental bill*
Master of Business Administration. York University.
Bachelor of Business Administration. University of Western Ontario, Richard Ivey School of Business.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (2007 - Present), Ottawa, Canada-Ontario.
Assistant Professor, Sprott School of Business, Carleton University (2004 - 2007), Ottawa, Canada-Ontario.
Assistant Professor, Niagara University (1998 - 2004), Lewiston, New York. Tenured Associate Professor 2004

Other Employment

Research Assistant, York University (1993 - 1997), Toronto, Canada-Ontario.
Teaching Assistant, York University (1994 - 1996), Toronto, Canada-Ontario. Management Skills Course MBA Program
Tutor, York University (August, 1995 - October, 1995), Toronto, Canada-Ontario. Tutor: East/West Enterprise Exchange

C. PROFESSIONAL HONOURS

2012: Faculty Graduate Mentoring Award, Carleton University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		4	3	7
Articles-in-Progress (All)		1		1
Publications in Conference Proceedings (Refereed)		1	2	3
Publications of Non-refereed or Invited Papers				0
Paper Presentations (Refereed)		1	1	2
Research Report, Non-Refereed		1		1
Grants - Funded (both refereed and non-refereed)		10		10
Other Research, Non-refereed		1		1
Totals		19	6	25

Refereed Scholarly Publications

Articles in Refereed Journals

McKay, R., Uruthirapathy, A., & Pankova, Y. (2024). Managing workplace bullying and harassment in the Canadian work context: same old, same old. *Employee Relations*, 46 (4), 850-870. [B]
McKay, R., & Uruthirapathy, A. (2023). Nontraditional Teaching Methods in a Human Resource Management Course: Delivery and Effectiveness. *International Journal of Digital Society*, 14 (1), 1865-1861. [C,Other]

- Gary, M., & McKay, R. (2022). Transparency and efficiency in building code review. The case of Ontario, Canada. *Canadian Journal of Civil Engineering*, 49 (9), 1471-1482. [C,Other]
- Neculita, C.S., & McKay, R. (2020). The institutionalisation and deinstitutionalisation of the cholesterol theory. *Transnational Corporations Review*, 12 (2), 173-192. [C]
- Elnahla, N., & McKay, R. (2020). Workplace issues in the context of Aldous Huxley's Brave New World: Mental health problems, cannabis and the division of labour. *Transnational Corporations Review*, 12 (2), 106-125. [C]
- McKay, R., Irwin, B., & Appel, R. (2020). When RateMyProfessor meets the #MeToo Movement: Bottom-up bullying in academia. *International Journal for Digital Society*, 11 (2), 1591-1598. [C,Other]
- McKay, R., Cray, D., & Mittelman, R. (2019). We're not in Kansas anymore: Academic honesty in an international business program. *International Journal of Management Education*, 17 (1), 1-14. [C]
- Cray, D., Mittelman, R., & McKay, R. (2019). Teaching in Iran: Culture and Consequences. *Intercultural Education*, 30 (4). [B,Other]
- Entry updated on Jan 14,2020
- In press
- Cray, D., McKay, R., & Mittelman, R. (2018). Cultural Intelligence and Mindfulness: Teaching MBAs in Iran. *Journal of International Education in Business*, 11 (2), 220-240. [C]
- Forthcoming
- Martin, G., McKay, R., & Ballamie, P. (2017). Climate change and housing production in Ottawa, Canada: the business case for change. *Transnational Corporations Review*, 9 (4), 269-280. [C]
- Special Issue on Technology, Innovation and Sustainable Development.
- McKay, R. (2016). The Commons: Three case studies of community forested land. *Journal of Public Management Research*, 2 (1), 1-13.
- McKay, R., Appel, R., Nedjad, F. H., & Kazemi, H. (2015). Complications of running a graduate program offshore. *News from Higher Educational Institutions. Sociology, Economics, Politics*, 4, 109-112.
- McKay, R. (2015). How to Manage a Bully: Workplace Bullying in Construction. *Advances in Social Science Research Journal*, 2 (12).
- Appel, R., Fratzi, J., McKay, R., & Stevens, C. (2014). Enron and the 12 Steps of White Collar Crime. *International Journal of Business Governance and Ethics*, 9 (4), 381-405. [B]
- McKay, R. (2014). Confronting Workplace Bullying: Agency and Structure in the Royal Canadian Mounted Police. *Administration and Society*, 46 (5), 548-572. [B]
- Cutler, A., McKay, R., & Brouard, F. (2014). Canadian Sponsorship Scandal: The Whistleblower's Perspective. *International Journal of Case Studies in Management*, 12 (2), 1-17.
- McKay, R., & Appel, R. (2013). Promoting cooperation in an MBA program: Experiential learning in the trees. *American International Journal of Contemporary Research*, 3 (8), 1-12.
- Huberman Arnold, D., & McKay, R. (2013). Sustainable Enterprises: Crisis Management and Culture Transformation for BP. *Business and Management Research*, 2 (3), 16-24.
- Ahmadi, H., McKay, R., & Murphy, S. (2013). Downsizing in Iran: Culture versus necessity. *International Journal of Business and Globalisation*, 10 (1), 86-103.
- McKay, R. (2012). Succession of a Small Family Business: Once You Are In It Is Hard To Get Out. *Leadership and Organizational Management Journal* (4), 19-27.
- McKay, R., & Huberman Arnold, D. (2012). How sustainable is out-of-sight-out-of Mind? The city of Toronto and its Waste. *Business Management Dynamics*, 2 (4), 10-17.
- McKay, R. (2012). When I knew it was time to leave: Bottom-up workplace bullying. *International Journal of Economics and Management Sciences*, 2 (3), 25-34.
- McKay, R., & Fratzi, J. (2011). A cause of failure in addressing workplace bullying: Trauma and the employee. *International Journal of Business and Social Science*, 2 (7), 13-27.
- McKay, R., Tebogo, P., & Fratzi, J. (2011). Due to a Personality Disagreement: Workplace Bullying at Roam Inc. *Business Case Journal*, 18 (1), 31-48.
- McKay, R. (2011). The Entrepreneur and the Bully Case A & B. *International Journal of Entrepreneurship and Small Business*, 14 (2), 303-311. [B]
- McKay, R., Stevens, C., & Fratzi, J. (2010). A 12-step process of white-collar crime. *International Journal of Business Governance and Ethics*, 5 (1), 14-25. [B]
- McKay, R., Ciocirlan, C. E., & Chung, E. (2010). Thinking Strategically about Workplace Bullying in Organizations. *Journal of Applied Management and Entrepreneurship*, 15 (4), 79-93. [C]
- McKay, R. (2010). How Many More Times Does the Process Need to Fail? *Ethics and Critical Thinking Journal* (1), 10-20.

Articles in Refereed Conference Proceedings

Full Paper

McKay, R., & Uruthirapathy, A. (2023). Student Perceptions of Hybrid Teaching and Flipped Classroom in Human Resource Management Course Delivery. *IICE*.

McKay, R., Irwin, B., & Appel, R. (2020). When RateMyProfessor meets the #MeToo Movement: Issues of policy, inappropriate behavior, and hyper-commercialization in academia. *Ireland International Conference on Education*.

Irwin, B., & McKay, R. (2019). Academic Bullying Through RateMyProfessor: Personal Versus Professional Commentary. *Canada International Conference on Education*, 134-138.

June 24-27, 2019 University of Toronto Mississauga Canada, ISBN:978-1-913572-00-6

McKay, R., Irwin, B., & Appel, R. (2018). Workplace Bullying and Harassment in RateMyProfessor.com: Consumer Pressure Through Evaluation. *Canadian International Institute of Education Conference*.

University of Toronto, Scarborough, Ontario, June 25th, 2018

Cray, D., Mittelman, R., & McKay, R. (2014). Teaching management in Iran: Who changes whom? *Annual Meeting of the International Association for Business and Society (IABS)*.

June 19-22, 2014. Sydney, Australia.

McKay, R., & Appel, R. (2013). Promoting cooperation in an MBA program: Experiential learning in the trees. *Northeast Decision Sciences Institute (NEDSI) Conference*.

April 4-7, 2013. New York, New York.

McKay, R., Hosseini Nedjad, F., Appel, R., & Kazemi, H. (2013). Challenges of running a North American graduate program offshore. *World Conference on Educational and Instructional Studies (WCEIS)*.

November 7-9, 2013. Antalya, Turkey.

Ahmadi, S. H., McKay, R., & Murphy, S. (2012). Downsizing in Iran: Culture vs. Necessity. *Global Conference on Business and Finance*.

June 2012. Costa Rica.

Cutler, A., McKay, R., & Brouard, F. (2011). Canadian Sponsorship Scandal: The Whistleblower's Perspective. *Administrative Sciences Association of Canada (ASAC)*.

Case Track, July 2-5, 2011. Montreal, Quebec.

Huberman Arnold, D., & McKay, R. (2010). Sustainable enterprises: Crisis management and culture transformation for BP. *Annual International Conference on Business & Sustainability*.

November 3-5, 2010. Portland, Oregon.

Martin, G., & McKay, R. (2010). Creating sustainability through leaders and managers in the Canadian housing industry. *Annual International Conference on Business & Sustainability*.

November 3-5, 2010. Portland State University, Portland, Oregon.

Abstract Only

Zheng, C., McKay, R., & Ciocirlan, C. (2024). Investigating the Cascading Effect of Leaders' OCBE: A Moderated Mediation Model. *5th International Conference on Research in Human Resource Management*.

Investigating the Cascading Effect of Leaders' OCBE: A Moderated Mediation

Chapters in Edited Books

Fratzl, J., & McKay, R. (2012). Professional staff in Academia: Academic culture and the role of aggression. In Jaime Lester (Ed.), *Workplace Bullying in Higher Education*. USA: Routledge. [Status: Published]

Other (Non-refereed) Scholarly Publications

Invited Articles/Review articles

McKay, R., & Irwin, B. (2020). Introduction to a special issue on breaking the disciplinary matrix: the ever-changing view of organizational theory. *Transnational Corporations Review*, 12 (2), 89-93.

Other Publications

Newspaper Articles or Columns

2024: Martin, G., & McKay, R., *Dams, Dikes and Dismay*. Building.ca February 8th, 2024

2023: McKay, R., & Martin, G., *Like Ships in the Night: Silos, Flood Risk, and Housing Development in Ottawa*.

2018: Martin, G., & McKay, R., *Cold, Ice, Heat, Mud and Deadlines: Will Weather Disruptions Cool Your Margins?* February 5th, 2018

2017: Martin, G., & McKay, R., *Climate Change, Big Dollars and Housing*. Building Magazine: December 22nd, 2017.

2017: McKay, R., & Martin, G., *Granite friggin' countertops and why builders should be climate leaders*. Building Magazine, November 30th, 2017.

2017: Martin, G., & McKay, R., *Preparing the Housing Industry for Climate Change*. Building Magazine, August 31st, 2017

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Mckay, R., Irwin, B., & Appel, R. (2020). *When RateMyProfessor meets the #MeToo Movement: Issues of policy, inappropriate behavior, and hyper-commercialization in academia*. Ireland International Conference on Education, Dún Laoghaire, Ireland (Northern).

Mckay, R., Irwin, B., & Appel, R. (2019). *Academic Bullying Through RateMyProfessor: Personal Versus Professional Commentary*. Canada International Conference on Education, Mississauga, Canada-Ontario.

Description: CICE-2019

Ciocirlan, C. & McKay, R. (2018, March). *Green Employees: An Empirical Testing of a Theoretical Model*. Academy of Business Research Spring Conference, New Orleans, Louisiana.

Description: March 21-23rd, 2018

Uruthirapathy, A., McKay, R., & Clancy, B. (2017). *Obedience to Authority at Work: Literature Review and Application to White-Collar Crime*. Administrative Sciences Association of Canada (ASAC), Montreal, Canada-Quebec.

Description: HEC Montreal, June 1st, 2017.

Mckay, R., Cray, D., & Mittleman, R. (2016). *Lind, a Social Ethic and Mercy: Academic Honesty in an International Business Program*. Conference of the Canadian Society for the Study of Practical Ethics (CSSPE), Calgary, Canada-Alberta.

Uruthirapathy, A. & McKay, R. (2014, May). *CSR and Organizational Isomorphism*. Administrative Sciences Association of Canada (ASAC), Muskoka, Canada-Ontario.

Chung, E., Ciocirlan, C., & Ngo, P. (2010). *Individual- and Group-Level Factors that Impact Sustainability*. International Conference on Business and Sustainability, Portland, Oregon.

Description: Nov 3-5th

Other Presentations

Presentation

2014: Conference Board of Canada, Webinar, Virtual. With Jae Fratzl: Workplace Bullying Primer: What It Is and How to Deal With It. September 15.

2012: Conference Board of Canada, Ottawa, Canada-Ontario. With Hossein Kazemi: "International Business Education and Workplace Practices", December 11, 2012.

2011: Investment Opportunities of Free & Special Economic Zones of Iran, Carleton University, Ottawa, Canada-Ontario. Content of presentation: Iran MBA program, April 1, 2011, Robertson Hall.

2010: Association of Certified Fraud Examiners, Ottawa, Canada-Ontario. A 12-step process of white collar crime. Presented to the Association of Certified Fraud Examiners, Ottawa Chapter, Sheraton Hotel.

Contract or Other Research

Research Grants and Awards

Grants

2026 [Year 4 of 4]: McKay, R. Partnership Development Grant (\$49,314.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2025 [Year 3 of 4]: McKay, R. Partnership Development Grant (\$49,314.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2025 [Year 3 of 3]: McKay, R. International Research Seed Grant (\$3,333.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2024 [Year 2 of 4]: McKay, R. Partnership Development Grant (\$49,314.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 2 of 3]: McKay, R. International Research Seed Grant (\$3,333.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2023 [Year 3 of 3]: McKay, R. Insight Development Grant (\$19,570.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 3 of 3]: McKay, R. Insight Development Grant (\$20,011.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 4]: McKay, R. Partnership Development Grant (\$49,314.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 3]: McKay, R. International Research Seed Grant (\$3,333.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2022 [Year 2 of 3]: McKay, R. Insight Development Grant (\$19,570.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 2 of 3]: McKay, R. Insight Development Grant (\$20,011.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 1 of 3]: McKay, R. Insight Development Grant (\$19,570.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 1 of 3]: McKay, R. Insight Development Grant (\$20,011.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020: McKay, R. Canada Nature Fund (\$176,535.00 Not Funded), Principal Investigator, Environment and Climate Change Canada. [Status: Not Funded]

2019: McKay, R. Accelerate (\$22,500.00), Principal Investigator, Mitacs. [Status: Funded]

2019: McKay, R. Accelerate (\$22,500.00), Principal Investigator, Institute for Catastrophic Loss Reduction. [Status: Funded]

2019: McKay, R. Partnership Engage Grant (\$25,000.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2019: McKay, R. Partnership Engage Grant (\$17,760.00 Not Funded), Principal Investigator, Institute for Catastrophic Loss Reduction. [Status: Not Funded]

2019: McKay, R. Partnership Engage Grant (\$24,729.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019: McKay, R. Partnership Engage Grant (\$17,760.00), Principal Investigator, Insurance Bureau of Canada. [Status: Funded]

2019: McKay, R. International Research Seed Grant (\$5,000.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2018: Integrity and Respect, Statistics Canada, Ottawa, Canada-Ontario.

Other Professional Service Activities

2024: Letter of Support promotion of Dr. Cristina Ciocirlan application. Letter in support of promotion of Dr Cristina Ciocirlan's application for promotion to Professor at Elizabethtown College, Elizabethtown, PA, U.S.A, September 2024

2019: Social Sciences and Humanities Research Council (SSHRC). SSHRC reviewer for the application by Laurie-Ann Hellsten-Bzovey, file number 435-2019-1147, December 2018-January 2019

Reviewer: Ad Hoc Reviewer for a Journal

2024: Improving Schools.

2021: Sustainability.

2020: International Journal of Management Education.

2020: Canadian Journal of Administrative Sciences.

2019: International Journal of Environmental Research and Public Health.

2017: International Journal of Business Continuity and Risk Management.

2013 – 2016: International Journal of Business Governance and Ethics.

2013: International Journal Environmental Responsibility and Public Health.

2010 – 2011: International Journal of Business Governance and Ethics.

Reviewer: Book / Textbook

2013: European Handbook on White Collar Crime.

Reviewer: Conference Paper

2010 – 2013: Administrative Sciences Association of Canada (ASAC).

Scholarly Work in Progress

Working Papers

Uruthirapapathy, A., McKay, R., & Ji, S. (2022). "Whistleblowing and Moral Courage Within Collective Cultures: A Comparative Analysis Between China and Colombia," targeted for International Journal of Cross Cultural Management.

McKay, R., Cray, D., & Mittleton, R. (2017). "Issues of Cheating in International Graduate Program."

Description: Research complete, paper in progress.

McKay, R. (2017). "The Commons: Three Case Studies of Community Forested Land.."

Description: Research and paper completed, selecting journal.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%

2024/Winter	BUSI3102	Human Resources Management	0.5	58	Main	100%
2024/Winter	BUSI3102	Human Resources Management	0.5	56	Main	100%
2024/Winter	BUSI3102	Human Resources Management	0.5	57	Main	100%
2024/Winter	BUSI6109	Special Topics in Management	0.5	3	Main	100%
2023/Fall	BUSI6100	Seminar in Modern Organizational Theory	0.5	8	Main	100%
2023/Fall	BUSI5180	Seminar in Management I: Modern Organization Theory	0.5	1	Main	100%
2022/Winter	BUSI3102	Human Resources Management	0.5	60	Main	100%
2022/Winter	BUSI3102	Human Resources Management	0.5	60	Main	100%
2022/Winter	BUSI3102	Human Resources Management	0.5	53	Main	100%
2021/Fall	BUSI3119	Business & Environmental Sustainability	0.5	24	Main	100%
2021/Fall	BUSI6100	Seminar in Modern Organizational Theory	0.5	6	Main	100%
2021/Winter	BUSI3102	Human Resources Management	0.5	55	Main	100%
2021/Winter	BUSI3102	Human Resources Management	0.5	52	Main	100%
2021/Winter	BUSI3102	Human Resources Management	0.5	49	Main	100%
2020/Fall	MGMT5117	Knowledge Management	0.25	19	Main	100%
2020/Fall	BUSI6100	Seminar in Modern Organizational Theory	0.5	9	Main	100%
2020/Fall	BUSI3119	Business & Environmental Sustainability	0.5	60	Main	100%
2020/Winter	MGMT5117	Knowledge Management	0.25	11	Main	100%
2020/Winter	BUSI3102	Human Resources Management	0.5	46	Main	100%
2020/Winter	BUSI3102	Human Resources Management	0.5	48	Main	100%
2020/Winter	BUSI3102	Human Resources Management	0.5	59	Main	100%
2019/Fall	BUSI3119	Business & Environmental Sustainability	0.5	41	Main	100%
2019/Summer	MGMT5117	Knowledge Management	0.25	17	Bogota	100%
2019/Winter	BUSI3102	Human Resources Management	0.5	55	Main	100%
2019/Winter	BUSI3102	Human Resources Management	0.5	49	Main	100%
2019/Winter	BUSI3102	Human Resources Management	0.5	45	Main	100%
2018/Fall	BUSI6100	Seminar in Modern Organizational Theory	0.5	4	Main	100%
2018/Summer	BUSI5802	Business Ethics	0.25	19	Bogota	100%
2018/Winter	MGMT5117	Knowledge Management	0.25	27	Bogota	100%
2017/Fall	BUSI3102	Human Resources Management	0.5	61	Main	100%
2017/Fall	BUSI6100	Seminar in Modern Organizational Theory	0.5	2	Main	100%
2017/Fall	BUSI3102	Human Resources Management	0.5	60	Main	100%
2017/Fall	BUSI3102	Human Resources Management	0.5	58	Main	100%
2017/Summer	BUSI5802	Business Ethics	0.25	28	Bogota	100%
2017/Winter	BUSI3102	Human Resources Management	0.5	60	Main	100%
2017/Winter	BUSI3102	Human Resources Management	0.5	53	Main	100%
2017/Winter	BUSI3102	Human Resources Management	0.5	60	Main	100%

2016/Fall	BUSI6100	Seminar in Modern Organizational Theory	0.5	6	Main	100%
2016/Fall	MGMT5117	Knowledge Management	0.25	9	Bogota	100%
2016/Summer	BUSI5802	Business Ethics	0.25	11	Bogota	100%
2016/Winter	MGMT5117	Knowledge Management	0.25	20	Bogota	100%
2015/Summer	BUSI2101	Organizational Behaviour	0.5	51	Main	100%
2015/Summer	BUSI5802	Business Ethics	0.25	33	Shanghai	100%
2015/Summer	BUSI3102	Human Resources Management	0.5	34	Main	100%

Service to the institution (Academic)

University Assignments

PhD. Comprehensive Committees:

2024-2025: Cheng Zheng

University Assignments

PhD. Thesis Committees:

2024-2025: Silviu Neculita

External Committees

Thesis Assignments

Masters Thesis Committees:

2017-2018: External, Pamela Forward

PhD. Thesis Committees:

2013-2014: External, Al-Karim Samnani

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Selected Media Appearances: Television

2017 - CBC morning show : February 2017 talking about Workplace bullying and Harassment in the workplace.

Selected Media Appearances: Online

2020 - CBC mention

2022 - How fiction can help business managers prepare for the uncertainties of the pandemic, Scroll.In,

2021 - 8 ways business managers can use fiction to prepare for the uncertain reality of coronavirus, The Conversation

2021 - 8 ways business managers can use fiction to prepare for the uncertain reality of coronavirus, EconoTimes Business

2022 - Scroll.In: How fiction can help business managers prepare for the uncertainties of the pandemic

Selected Media Appearances: Radio

2024 - CBC radio interview with Alan Neal regarding research on flooding :

August 13th, 2024

Credentials

Professional Development

Professional Seminars / Workshops

2012: EDC Certificate in University Teaching, Carleton University.

Skills

Languages

EN – Speake, Write, Read

Research Reports

2019: McKay, R., & Fratzl, J., Proactive Strategies for Managing Workplace Harassment and Bullying., submitted to WorkSafeBC.

2015: McKay, R., & Fratzl, J., Workplace Bullying Primer: What It Is and How to Deal With It., submitted to Conference Board of Canada.

Service to the Community**Speech / Presentation at a Community Meeting**

2017: Business and Professional Women, Workplace Harassment and Workplace Bullying. Nov 16th, 2017, Clocktower Brew Pub.

Curriculum Vitae - Sprott School of Business

Lindsay McShane, PhD
Associate Professor - Tenured, 2018
Sprott School of Business (Marketing)
Telephone: 613-520-2600 x2030
Email: lindsay.mcshane@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-6363-3700>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Queen's University.
Title: *Queen's School of Business. Thesis: It's Not Just Business, It's Personal: Identity Threats and Fairness Judgments Supervisor: Dr. Laurence Ashworth*

Master of Science. Queen's University.
Title: *Queen's School of Business. Thesis: A Study on the Authenticity of Corporate Social Responsibility: Employee Perception Supervisor: Dr. Peggy Cunningham*

Bachelor of Business Administration. Bishop's University.
Title: *Williams School of Business and Economics*

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (2018 - Present), Ottawa, Canada-Ontario. Marketing

Assistant Professor, Sprott School of Business, Carleton University (2013 - 2018), Ottawa, Canada-Ontario. Marketing

Assistant Professor, Laurier School of Business and Economics, Wilfrid Laurier University (2012 - 2013), Waterloo, Canada-Ontario. Marketing

C. PROFESSIONAL HONOURS

2019: Invited Guest, Designing a Career in the Marketing Academy: A Gathering of Future Leaders. Chicago, Illinois, Aug. 11-13

- One of 20 female scholars from across North America identified as a future leader in the field.
- This gathering aims to provide a forum for discussing and addressing challenges facing female academic scholars both in marketing, and business schools more generally.

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2017: Early Researcher Award, Ontario Ministry of Research & Innovation. Nominated by the Dean and the Research Office for an Ontario Ministry of Research & Innovation Early Researcher Award (ERA)..

2011: Doctoral Fellowship, Social Sciences and Humanities Research Council.

2010: Sheth Foundation Doctoral Consortium Fellow, American Marketing Association.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	2	2		4
Articles-in-Progress (All)		7		7
Paper Presentations (Refereed)	1	1		2
Grants - Funded (both refereed and non-refereed)		4		4
Totals	3	14		17

Refereed Scholarly Publications

Articles in Refereed Journals

McShane, L., Pancer, E., Poole, M., & Deng, Q. (2021). Emoji, Playfulness, and Brand Engagement on Twitter. *Journal of Interactive Marketing*, 53, 96-110. [A]

- Doha, A., Elnahla, N., & McShane, L. (2019). Social commerce as social networking. *Journal of Retailing and Consumer Services*, 47, 307-321. [A]
- McShane, L., Pancer, E., & Poole, M. (2019). The Influence of B to B Social Media Message Features on Brand Engagement: A Fluency Perspective. *Journal of Business-to-Business Marketing*, 26 (1), 1-18. [B]
- Ashworth, L., Darke, P. R., McShane, L., & Vu, T. (2019). The Rules of Exchange: Evidence that Consumers Demand an Exchange Premium and its Role in Producing the Endowment Effect. *Organizational Behavior and Decision Processes*, 152, 11-24. [A+]
- Pancer, E., McShane, L., & Noseworthy, T. J. (2017). Isolated Environmental Cues and Product Efficacy Penalties: The Color Green and Eco-labels. *Journal of Business Ethics*, 143 (1), 159-177. [A,FT50]
- Pancer, E., McShane, L., & Poole, M. (2017). Schadenfreude and the Experience of Deservingness. *Journal of Marketing Management*, 33 (15-16), 1236-1255. [A]
- Updated as published on Jan 12, 2020
- Sabadoz, C., & McShane, L. (2016). Organizational Accountability Relations: De Facto or De Jure? *Social Responsibility Journal*, 12 (1), 32-53. [B]
- McShane, L., & Sabadoz, C. (2015). Rethinking the Concept of Consumer Empowerment. *International Journal of Consumer Studies*, 39 (5), 544-551. [A]
- Ashworth, L., & McShane, L. (2012). Why Do We Care What Others Pay? The Role of Other Consumers' Prices in Inferences of Seller Respect. *Journal of Retailing*, 88 (1), 145-155. [A+]
- Authors contributed equally.
- McShane, L., & Cunningham, P. (2012). To Thine Own Self Be True? Employees' Judgments of the Authenticity of their Organization's CSR Program. *Journal of Business Ethics*, 108 (1), 81-100. [A,FT50]
- Jenkin, T., McShane, L., & Webster, J. (2011). Green Information Technologies and Systems in Organizations: Employees' Perceptions of the State of Practice. *Business and Society*, 50 (2), 266-314. [A]
- Jenkin, T., Webster, J., & McShane, L. (2011). An Agenda for 'Green' Information Technology and Systems Research. *Information and Organization*, 21 (1), 17-40. [A+]
- Mena, S., de Leede, M., Baumann, D., McShane, L., Black, N., S. Lindeman (2010). Advancing the Business and Human Rights Agenda: Dialogue, Empowerment and Constructive Engagement. *Journal of Business Ethics*, 93 (1), 161-188. [A,FT50]

Articles in Refereed Conference Proceedings

Full Paper

- Pancer, E., McShane, L., & Poole, M. (2017). Emoji and Brand Engagement on Social Media. *Administrative Sciences Association of Canada (ASAC)*.
Montreal, QC.
- Pancer, E., McShane, L., & Poole, M. (2017). Emoji and Brand Engagement on Social Media. *American Marketing Association's (AMA) Summer Educators' Conference*.
San Francisco, CA.
- McShane, L., Pancer, E., & Poole, M. (2017). Content Characteristics and B2B Social Media Brand Engagement: A Fluency Perspective. *American Marketing Association's (AMA) Summer Educators' Conference*.
San Francisco, CA
- Pancer, E., McShane, L., & Poole, M. (2017). Emoji and Brand Engagement on Social Media. *Association for Consumer Research (ARC) Conference*.
San Diego, CA
- Elnahla, N., Doha, A., & McShane, L. (2017). Group Formation in Reverse Auction Service e-Commerce. *International Conference on Business & Entrepreneurship, Supply Chain Management & Information Systems*.
22nd-23rd May 2017, Alexandria, Egypt.
- Leighann, N., McShane, L., & Stuewe, D. (2016). Community Service Learning: the Community Partner Perspective. *Atlantic Schools of Business Conference*.
St. Mary's University, Halifax.
- Laurence, A., Darke, P., McShane, L., & Vu, T. (2015). The Role of Desires to Trade on Favorable Terms in Producing the Endowment Effect. *Association for Consumer Research (ARC) North American Conference*.
New Orleans, LA.
- Ashworth, L., Darke, P., McShane, L., & Vu, T. (2014). Prices that Feel Good: The Role of Trading Motivation in the Endowment Effect. *Southern Ontario Behavioral Decision Research Conference*.
Guelph, Ontario, Canada.
- Pancer, E., & McShane, L. (2014). It Ain't Easy Being Green: Unintended Effects of The Colour Green. *Administrative Sciences Association of Canada (ASAC)*.
Muskoka, Ontario, Canada.
- McShane, L., & Pancer, E. (2013). Gauging Greenwashing and Questioning Quality: The Unintended Effects of Environmental Claims on

Perceptions of Product Effectiveness. *Society for Consumer Psychology North American Conference*.
San Antonio, Texas.

McShane, L., & Ashworth, L. (2013). What Does This Price Differential Say About Me? Self-threat and Consumers' Price Fairness Judgments. *Society for Consumer Psychology North American Conference*.
San Antonio, Texas.

Ashworth, L., McShane, L., & Vu, T. (2012). To Trade or Not?: Removing Trading Motivation Eliminates the Endowment Effect. *Association for Consumer Research (ARC) North American Conference*.
Vancouver, British Columbia, Canada.

McShane, L., & Ashworth, L. (2011). Taken Advantage Of or Taking Advantage Of? Consumer Reactions to Advantageously Inequitable Prices. *Society for Consumer Psychology North American Conference*.
Atlanta, Georgia.

McShane, L., & Ashworth, L. (2011). Price Comparisons as Information about Personal Competence and Relational Value: The Influence on Perceived Fairness. *Association for Consumer Research (ARC) North American Conference*.
St. Louis, Missouri.

Ashworth, L., Davis, S., & McShane, L. (2011). Unfair or Unfavorable? Social Comparisons and the Spontaneous Activation of (Un)Fairness Concerns. *Association for Consumer Research (ARC) North American Conference*.
St. Louis, Missouri. Authors listed in alphabetical order.

McShane, L., & Ashworth, L. (2011). It's Not Just Business, It's Personal: The Self-Threatening Nature of Price Comparisons and Their Influence on Fairness Judgments. *Behavioral Pricing Conference*.
Syracuse, New York.

McShane, L., & Ashworth, L. (2011). Simply Inequitable or Exploitative too? Exploitation, Self-Threats and Perceptions of Fairness in Marketplace Exchanges. *Association for Consumer Research (ARC) Asia-Pacific Conference*.
Beijing, China.

McShane, L., & Ashworth, L. (2011). Is That Really Relevant? An Equity Theory Perspective on What Inputs and Outcomes Consumers Consider Relevant to Fairness Judgments. *Society for Consumer Psychology North American Conference*.
Atlanta, Georgia.

LaBarge, M., & McShane, L. (2011). Guilt or Pride – Which is the More Motivational Self-Conscious Emotion? *Society for Consumer Psychology North American Conference*.
Atlanta, Georgia.

Ashworth, L., & McShane, L. (2011). Invidious Comparisons: Multiple Sources of Unfairness in Comparisons to Prices Paid by Other Consumers. *Association for Consumer Research (ARC) Asia-Pacific Conference*.
Beijing, China.

McShane, L. (2010). The Confluence of Ideologies in Consumption Activities. *Association for Consumer Research (ARC) North American Conference*.
Jacksonville, Florida.

McShane, L. (2010). Building an Understanding of Consumer Empowerment. *American Marketing Association's (AMA) Summer Educators' Conference*.
Boston, Massachusetts.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Pancer, E., Noseworthy, T., McShane, L., Taylor, N., & Philip, M. (2023). *The Future of Flavor: Understanding the Influence of Food Service Automation on Taste Perceptions*. Association for Consumer Research (ARC) Conference, Seattle, Washington.

Banu, N., Rahman, M. M., & McShane, L. (2022). *Supererogation: Analyzing the Effects of Fault Revealing on Seller Profit*. Society of Consumer Psychology Conference, Virtual, Virtual.

McShane, L. & Neilson, L. C. (2016). *Closing the Loop: Community Engaged Pedagogy in Business Courses*. Canadian Alliance for Community Service Learning, Calgary, Canada-Alberta.

Description: Presented via skype at CACSL Conference 2016: Impact for Sustainability, May 25-27, Mount Royal University, Calgary, Alberta, 2016.

Neilson, L., McShane, L., & Stuewe, D. (2016). *Community Service Learning: The Community Partner Perspective*. Atlantic Schools of Business Conference, Halifax, Canada-Nova Scotia.

Description: October 21-23.

Other Presentations

Presentation

2021: Sprott Research Seminar Presentation. "Threat, Emoji and Creepiness", Sprott Research Seminar Presentation, Oct. 22nd, 2021

2011: Consumer Behaviour Research Camp, London, Canada-Ontario. "Why Do We Care What Others Pay? The Role of Other Consumers' Prices in Inferences of Seller Respect" presented at the Consumer Behaviour Research Camp at Richard Ivey School of Business, London, ON (2011).

2011: Department of Marketing and Consumer Studies, University of Guelph, Guelph, Canada-Ontario. Presentation: "It's Personal, Not Business: Fairness Perceptions and Self-Threat", invited speaker at Department of Marketing and Consumer Studies, University of Guelph (2011).

2011: Wilfrid Laurier University School of Business and Economics, Waterloo, Canada-Ontario. Presentation: "It's Personal, Not Business: Fairness Perceptions and Self-Threat", invited speaker

2010: Sprott PhD Symposium, Ottawa, Canada-Ontario. "The Authenticity of Corporate Social Responsibility Programs: A Typology of Employee Perceptions," presented at the Sprott Doctoral Symposium, Ottawa, ON (2010).

Contract or Other Research

Research Grants and Awards

Grants

2025 [Year 3 of 3]: McShane, L. Insight Development Grant (\$20,498.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024: McShane, L. Research Achievement Award (\$10,000.00 Not Funded), Principal Investigator, PRI-Carleton University. [Status: Not Funded]

2024 [Year 2 of 3]: McShane, L. Insight Development Grant (\$20,498.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 2]: McShane, L. Insight Development Grant (\$24,428.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 1 of 3]: McShane, L. Insight Development Grant (\$20,498.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 2]: McShane, L. Development Grant - SSHRC Bridge (\$0.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2022 [Year 1 of 2]: McShane, L. Insight Development Grant (\$24,428.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 1 of 2]: McShane, L. Development Grant - SSHRC Bridge (\$0.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2019 [Year 2 of 2]: McShane, L. Insight Development Grant (\$22,266.00 of a total grant amount of \$44,532.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 1 of 2]: McShane, L. Insight Development Grant (\$22,266.00 of a total grant amount of \$44,532.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 1 of 2]: Ruff, K. & McShane, L., Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2017 [Year 2 of 2]: McShane, L. Insight Development Grant (\$30,044.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016 [Year 3 of 3]: McShane, L. Start-up Funds (\$1,666.00 of a total grant amount of \$5,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2016 [Year 3 of 3]: McShane, L. Start-up Funds (\$1,666.00 of a total grant amount of \$5,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2016 [Year 2 of 2]: McShane, L. Insight Development Grant (\$28,269.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016 [Year 1 of 2]: McShane, L. Insight Development Grant (\$30,044.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2015 [Year 2 of 3]: McShane, L. Start-up Funds (\$1,666.00 of a total grant amount of \$5,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2015 [Year 2 of 3]: McShane, L. Start-up Funds (\$1,666.00 of a total grant amount of \$5,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2015 [Year 1 of 2]: McShane, L. Insight Development Grant (\$28,269.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2014 [Year 1 of 3]: McShane, L. Start-up Funds (\$1,666.00 of a total grant amount of \$5,000.00), Principal Investigator, Carleton University, Sprott School of Business. [Status: Funded]

2014 [Year 1 of 3]: McShane, L. Start-up Funds (\$1,666.00 of a total grant amount of \$5,000.00), Principal Investigator, Carleton University,

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Officer: Organization / Association

2010 – 2014: American Marketing Association's (AMA) Special Interest Groups. American Marketing Association's Doctoral Student Special Interest Group Officer: Responsible for organizing symposia, providing resources to students via the DocSIG website and listserv, organizing and chairing conference sessions, and managing the DocSIG budget. divisor (August 2011 – 2014); Past Chair (August 2010 - August 2011); Chair (August 2009 – August 2010); Chair Elect (May 2008 – August 2009).

Other Professional Service Activities

2011 – 2012: Queen's School of Business Unit Research Ethics Board (UREB). PhD Reviewer

Reviewer: Ad Hoc Reviewer for a Journal

2023: Journal of Research in Interactive Marketing.

2020 – 2023: Journal of Business Research.

2016 – 2023: Journal of Marketing Management.

2011 – 2023: Journal of Business Ethics.

2022: Industrial Marketing Management.

2019: Journal of Business-to-Business Marketing.

2017: Industrial Marketing Management.

2010 – 2017: California Management Review.

2013: Managing Service Quality.

2011: European Management Journal.

Reviewer: Book / Textbook

2019: Textbook review: Marketing. Textbook review: Marketing, Grewal/Levy/Persaud/Lichti, McGraw Hill Ryerson, 5th Canadian edition

Reviewer: Conference Paper

2010 – 2013: Academy of Management Meeting.

2010 – 2013: Academy of Marketing Science (AMS) Annual Conference.

2010 – 2013: American Marketing Association's (AMA) Summer Educators' Conference.

2010 – 2013: Association for Consumer Research (ARC) Conference.

2010 – 2013: Society for Consumer Psychology Conference.

Scholarly Work in Progress

Papers Under Review

Deng, Q. & McShane, L. (2022). "Emojis as Word Substitutions or Reinforcements? The Influence of Emoji Role on Brand Perceptions and Intentions," Revision under 2nd review to *Journal of Business Research*.

McShane, L., Pancer, E., Poole, M., & Deng, Q. (2019). "Emoji and Brand Engagement on Social Media," Revision under 2nd review to *Journal of Interactive Marketing*.

Doha, A., Elnahla, N., & McShane, L. (2018). "Social Commerce as Social Networking," Revised and resubmitted to *Journal of Retailing and Consumer Services*.

Working Papers

McShane, L., Ashworth, L., & Drake, P. (2023). "It's Not Just Business, It's Personal: Relational Value and Price Fairness Judgments," targeted for International Journal of Research in Marketing.

pancer, E., Noseworthy, T., McShane, L., Taylor, N., & Philip, M. (2023). "Robots in the kitchen: Food service automation and the compounding effects of perceived love and disgust on anticipated taste," targeted for European Journal of Marketing.

Qi, D., McShane, L., Wang, Y., & Banu, N. (2023). "Can Emojis and B2B Mix? Examining Emojis in B2B Social Media Engagement," targeted for Industrial Marketing Management.

Qi, D. & McShane, L. (2023). "Emoji are not all Created Equal: The Effects of Emoji Variations on Brand Perceptions and Intentions?," targeted for Computers in Human Behavior.

McShane, L. & Qi, D. (2023). "Can Emojis Convey Competence? Understanding the Effects of Emoji Variations on Brand Competence Perceptions via Fluency?," targeted for Journal of Marketing Communications.

Description: *Journal of Marketing Communications*

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4208	Marketing Management	0.5	51	Main	100%
2023/Fall	BUSI2208	Introduction to Marketing	0.5	75	Main	100%
2023/Fall	BUSI2208	Introduction to Marketing	0.5	76	Main	100%
2023/Winter	BUSI4208	Marketing Management	0.5	50	Main	100%
2022/Fall	BUSI2208	Introduction to Marketing	0.5	87	Main	100%
2022/Fall	BUSI2208	Introduction to Marketing	0.5	88	Main	100%
2022/Winter	BUSI2208	Introduction to Marketing	0.5	80	Main	100%
2022/Winter	BUSI2208	Introduction to Marketing	0.5	80	Main	100%
2021/Fall	BUSI2208	Introduction to Marketing	0.5	10	Main	100%
2019/Fall	BUSI3204	Marketing: New Tools	0.5	58	Main	100%
2019/Fall	BUSI2208	Introduction to Marketing	0.5	79	Main	100%
2019/Fall	BUSI2208	Introduction to Marketing	0.5	75	Main	100%
2019/Winter	BUSI3204	Marketing: New Tools	0.5	39	Main	100%
2019/Winter	BUSI2208	Introduction to Marketing	0.5	46	Main	100%
2018/Fall	BUSI3204	Marketing: New Tools	0.5	39	Main	100%
2018/Fall	BUSI2208	Introduction to Marketing	0.5	88	Main	100%
2017/Winter	BUSI2208	Introduction to Marketing	0.5	85	Main	100%
2017/Winter	BUSI2208	Introduction to Marketing	0.5	88	Main	100%
2016/Fall	BUSI2208	Introduction to Marketing	0.5	86	Main	100%
2016/Fall	BUSI3204	Marketing: New Tools	0.5	56	Main	100%

Service to the institution (Academic)

University Assignments

PhD. Comprehensive Committees:

2023-2024: Narmin Banu

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2018-2019 – 2019-2020: Tenure and Promotion Committee - Departmental (Cluster I)

H. OTHER

Selected Media Appearances: Online

2021 - The power of emojis: How a ϵ or a $\epsilon\epsilon$ in tweets engages more people, The Conversation

Credentials

Professional Memberships

American Marketing Association, N/A

Association for Consumer Research, N/A

Designing Your Career in the Marketing Academy, N/A

Society for Consumer Psychology, N/A

Skills

Languages

Languages: English (high proficiency), French (intermediate proficiency)

Research Reports

2016: Neilson, L., & McShane, L., Closing the Loop: Community Engaged Pedagogy in Business Courses., submitted to Canadian Association of Community Service Learning.

Curriculum Vitae - Sprott School of Business

Sana Mohsni, PhD
Associate Professor - Tenured, 2014
Sprott School of Business (Finance)
Telephone: 613-520-2600 x2991
Email: sana.mohsni@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-7803-3812>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Concordia University.
Title: *Disseration Title: "Earnings, Idiosyncratic Volatilities and Costs of Capital", Advisor: Dr. Lawrence Kryzanowski*

Master of Science. École des Hautes Études commerciales de Montréal.
Title: *Thesis Title: "Study of Mean Reversion in Futures Contracts", Advisor: Dr. Minh Chau To*

Bachelor of Business Administration. Institut des hautes études commerciales de Carthage.
Title: *Thesis Title : "Capital Adequacy and the Cost of Capital", Advisor : Dr. Khaled Khouaja*

Professional Certifications

Certified Microfinance Expert, 2015, Frankfurt School of Finance and Management.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (July, 2016 - Present), Ottawa, Canada-Ontario.

Visiting Scholar, University of Palermo (March, 2023 - July, 2023), Palermo, Italy.

Visiting Scholar, Kyoto University (March, 2023 - June, 2023), Kyoto, Japan.

Visiting Scholar, University of Nagasaki (April, 2017 - June, 2017), Nagasaki, Japan.

Visiting Scholar, Athens Institute for Education and Research (ATINER) (January, 2017 - April, 2017), Athens, Greece.

Visiting Scholar, University of Palermo (January, 2017 - April, 2017), Palermo, Italy.

Visiting Scholar, De Montfort University (September, 2016 - December, 2016), Leicester, United Kingdom.

Visiting Scholar, University of Malta (September, 2016 - December, 2016), Msida, Malta.

Assistant Professor, Sprott School of Business, Carleton University (2009 - 2016), Ottawa, Canada-Ontario.

Visiting Assistant Professor, John Molson School of Business, Concordia University (2008 - 2009), Montreal, Canada-Quebec.

C. PROFESSIONAL HONOURS

2023: Best Doctoral Paper Award, The Global Initiative for Governance and Sustainability. Mohsni S. and A. Benaissa. Board Gender Diversity and ESG: The Case of Canada, Best Doctoral Paper Award, The Global Initiative for Governance and Sustainability, Hammamet, Tunisia.

2013: Excellence in Teaching Award, Carleton University Students Association.

2008: Best paper Award in Risk Management, Financial Management Association. Earnings forecasts and idiosyncratic volatilities.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	6		7
Articles-in-Progress (All)		10		10
Publications in Conference Proceedings (Refereed)		3		3
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings	1			1
Paper Presentations (Refereed)		9		9
Grants - Funded (both refereed and non-refereed)		11	1	12

Totals	2	39	1	42

Refereed Scholarly Publications

Articles in Refereed Journals

Muhammad, H., Migliori, S., & Mohsni, S. (2023). Corporate Governance and Firm Risk-Taking: The Moderating Role of Board Gender Diversity. *Meditari Accountancy Research*, 31 (3), 706-728. [A]

volume assigned in 2023

Firoozi, M., & Mohsni, S. (2023). Cybersecurity disclosure in the banking industry: a comparative study. *International Journal of Disclosure and Governance*, 20, 451-477. [B,Other]

Mohsni, S., Otchere, I., & Shahriar, S. (2022). Board gender diversity, firm performance and risktaking in developing countries: the moderating role of culture. *Journal of International Financial Markets, Institutions and Money*, 73, 101360. [A]

Note from Isaac: This article was not considered in 2021 because i was waiting for page number to be assigned

Mohsni, S., Otchere, I., & Yamada, K. (2022). Passive trading and firm performance: A quasi-natural experiment using the TSE-OSE merger in Japan. *Pacific Basin Finance Journal*, 70, 101666. [A]

Note from Isaac: This article was not considered in 2021 because i was waiting for page number to be assigned

Laajili, K., Mohsni, S., Polizzi, S., & Scanella, E. (2022). A Qualitative Analysis of Bank Risk Credit Risk Disclosure: Evidence from the Canadian and Italian Banking Sectors. *Journal of Corporate Accounting and Finance*, 33 (4), 207-230. [B]

Volume assigned in 2022

Muhammad, H., Migliore, S., & Mohsni, S. (2021). Capital structure and firm performance: the role of corporate governance. *International Journal of Business Governance and Ethics*, 15 (4), 436 - 458. [B]

2022 Update: published with DOI and volume assigned

Forthcoming

Muhammad, H., Migliori, S., & Mohsni, S. (2021). Corporate governance and R&D investment: the role of debt financing. *Industrial and Corporate Change*. [A]

Published with DOI

Mohsni, S., & Otchere, I. (2018). Does regulatory regime matter for bank risk taking? A comparative analysis of US and Canada. *Journal of International Financial Markets, Institutions and Money*, 53, 1-16. [A]

Available online 1 September 2017

Mohsni, S., & Otchere, I. (2016). Changing Organizational Form in the Stock Exchange Industry and Risk Taking. *Financial Markets and Portfolio Management*, 30, 427-451. [B]

Kryzanowski, L., & Mohsni, S. (2015). Earnings Forecasts and Idiosyncratic Volatilities. *International Review of Financial Analysis*, 41, 107-123. [A]

Contribution: 70 percent.

Mohsni, S., & Otchere, I. (2015). Financial Crisis, Liquidity Infusion and Risk-Taking: The Case of Canadian Banks. *Journal of Banking Regulation*, 16 (2), 146-167. [B]

Contribution: 50 percent.

Mohsni, S., & Otchere, I. (2014). Risk Taking Behavior of Privatized Banks. *Journal of Corporate Finance*, 29, 122-142. [A+]

Contribution: 50 percent.

Kryzanowski, L., & Mohsni, S. (2014). Persistence and Current Determinants of the Future Earnings Growth Rates of Firms. *European Journal of Finance*, 20 (2), 181-200. [A]

Contribution: 70 percent.

Otchere, I., Owusu-Antwi, G., & Mohsni, S. (2013). Why are Stock Exchange IPOs So Underpriced and yet Outperform in the Long Run? *Journal of International Financial Markets, Institutions and Money*, 27, 76-98. [A]

Contribution: 30 percent.

Kryzanowski, L., & Mohsni, S. (2013). Growth of Aggregate Corporate Earnings and Cash-flows: Persistence and Determinants. *International Review of Economics and Finance*, 25, 13-23. [A]

Contribution: 70 percent.

Kryzanowski, L., & Mohsni, S. (2010). Capital Returns, Costs and EVA for Canadian Firms. *North American Journal of Economics and Finance*, 21 (3), 256-273. [B]

Contribution: 70 percent.

Articles in Refereed Conference Proceedings

Full Paper

Firoozi, M., & Mohsni, S. (2022). Cybersecurity Disclosure in the Banking Industry: A Comparative Study. *European Accounting Association*.

Firoozi, M., & Mohsni, S. (2022). Cybersecurity Disclosure in the Banking Industry: A Comparative Study. *Canadian Academic Accounting*

Association Annual Conference.

Firoozi, M., & Mohsni, S. (2022). Cybersecurity Disclosure in the Banking Industry: A Comparative Study. *American Accounting Association Annual Conference*.

Chapters in Edited Books

Mohsni, S., Mim, S.B., & Hajji, F. (2023). Governance, Gender Diversity, and Banking Performance: New Evidence from North African and GCC Countries. *Governance in the Developing World*. Springer. [Status: Published]

Description: https://doi.org/10.1007/978-981-99-2493-6_9

Other (Non-refereed) Scholarly Publications

Other Publications

Other Publications

2018: Mohsni, S., & Otchere, I., *Have you ever wondered why banking crises happens in America but not in Canada*. This is a shortened version and a summary of one of a co-authored paper published in the Journal of Banking Regulation

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Mohsni, S. (2023). *Board Gender Diversity and ESG: The Case of Canada*. The Global Initiative for Governance and Sustainability, Hammamet, Tunisia.

Mohsni, S., Mojai, A., & Firoozi, M. (2023). *Board gender diversity and risk taking in Canada: Does firm size matter?* Academy of Sustainable Finance, Accounting, Accountability & Governance, Valencia, Spain.

Mohsni, S. & Benaissa, A. (2023). *Board Gender Diversity and ESG: The Case of Canada*. Administrative Science Association of Canada, Toronto, Canada-Ontario.

Mohsni, S. & Benaissa, A. (2023). *Board Gender Diversity and ESG: The Case of Canada*. The Global Initiative for Governance and Sustainability, Saint-Catherine, Canada-Ontario.

Firoozi, M. & Mohsni, S. (2022). *Cybersecurity Disclosure in the Banking Industry: A Comparative Study*. European Accounting Association, Bergen, Norway.

Firoozi, M. & Mohsni, S. (2022). *Cybersecurity Disclosure in the Banking Industry: A Comparative Study*. Canadian Academic Accounting Association Annual Conference, Virtual, Virtual.

Firoozi, M. & Mohsni, S. (2022). *Cybersecurity Disclosure in the Banking Industry: A Comparative Study*. American Accounting Association Annual Conference, Virtual, Virtual.

Lajili, K., Mohsni, S., Polizzi, S., & Enzo, S. (2021). *Credit risk disclosure and value relevance in the banking sector: Empirical evidence from Canada and Italy*. ADEIMF summer conference, Palermo, Italy.

Mohsni, S. & Shata, A. (2021). *Board Gender Diversity and Firm Performance: The Role of Firm Size*. Critical and Alternative Thinking in Governance, Barcelona, Spain.

Mohsni, S., Otchere, I., & Yamada, K. (2018, July). *Passive Trading and Performance: A Quasi Natural Experiment using the Stock Exchange Merger in Japan*. World Finance Conference, Port Louis, Mauritius.

Mohsni, S. & Otchere, I. (2017). *Does regulatory regime matter for bank risk taking? A comparative analysis of US and Canada*. Conference of the Multinational Finance Society, Limassol, Cyprus.

Description: March 2017

Mohsni, S. & Otchere, I. (2017). *Does regulatory regime matter for bank risk taking? A comparative analysis of US and Canada*. Cross Country Perspectives in Finance Conference, Pu'er, China.

Mohsni, S. & Otchere, I. (2015). *Changing Organizational Form in the Stock Exchange Industry and Risk Taking*. Global Finance Conference, Hangzhou, China.

Description: April 2015

Mohsni, S. & Otchere, I. (2015). *Changing organizational form in the stock exchange industry and risk taking*. International Banking and Finance Society (IFABS) Conference, Hangzhou, China.

Description: June 2015

Mohsni, S. & Otchere, I. (2013). *Financial crisis, non-disclosure of government financial assistance and risk-taking: The case of Canadian Banks*. Financial Management Association (FMA) Conference, Chicago, Illinois.

Description: October 2013

Mohsni, S. & Otchere, I. (2012). *Risk-taking behavior of newly-privatized banks*. World Finance Conference, Shanghai, China.

Mohsni, S. & Otchere, I. (2012). *Risk-taking behavior of newly-privatized banks*. Northern Finance Association (NFA) Conference, Niagara Falls,

Canada-Ontario.

Description: September 2012

Otchere, I., Mohsni, S., & Owusu-Antwi, G. (2010). *Why are stock exchange IPOs so underpriced and yet outperform in the long run? A test of the signaling hypothesis*. Conference on Theories and Practices of Securities and Financial Markets, Taipei, Taiwan.

Other Presentations

Presentation

2023: University of Palermo.

Contract or Other Research

Research Grants and Awards

Grants

2026 [Year 5 of 5]: Mohsni, S. Insight Grant (\$19,938.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2025 [Year 4 of 5]: Mohsni, S. Insight Grant (\$19,938.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2024 [Year 3 of 5]: Mohsni, S. Insight Grant (\$19,938.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2024 [Year 3 of 3]: Mohsni, S. Canadian Academic Accounting Association (\$3,325.00), Principal Investigator, PRI-Canadian Academic Accounting Association (CAAA). [Status: Funded]

2023 [Year 3 of 3]: Firoozi, M. & Mohsni, S., Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Co-applicant. [Status: Funded]

2023 [Year 2 of 5]: Mohsni, S. Insight Grant (\$19,938.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 2 of 2]: Mohsni, S. Partnership Engage Grant (\$12,127.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 3]: Mohsni, S. Canadian Academic Accounting Association (\$3,325.00), Principal Investigator, PRI-Canadian Academic Accounting Association (CAAA). [Status: Funded]

2022 [Year 3 of 3]: Mohsni, S. Insight Development Grant (\$29,704.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 2 of 3]: Firoozi, M. & Mohsni, S., Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Co-applicant. [Status: Funded]

2022 [Year 1 of 5]: Mohsni, S. Insight Grant (\$19,938.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 1 of 2]: Mohsni, S. Partnership Engage Grant (\$12,127.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 3]: Mohsni, S. Canadian Academic Accounting Association (\$3,325.00), Principal Investigator, PRI-Canadian Academic Accounting Association (CAAA). [Status: Funded]

2021 [Year 2 of 3]: Mohsni, S. Insight Development Grant (\$29,704.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 1 of 3]: Firoozi, M. & Mohsni, S., Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). Co-applicant. [Status: Funded]

2021: Mohsni, S. Development Grants - SSHRC Explore (\$9,212.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Mohsni, S. I-CUREUS (\$2,500.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Mohsni, S. & Shata, A., CFA Society Toronto Research Award (\$10,000.00), Principal Investigator, CFA Society. [Status: Funded]

2020 [Year 1 of 3]: Mohsni, S. Insight Development Grant (\$29,704.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2020: Firoozi, M. & Mohsni, S., Grant, Co-Investigator, Canadian Academic Accounting Association. co-applicant. [Status: Funded]

2020: Otchere, I. & Mohsni, S., Partnership Engage Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). co-applicant. [Status: Funded]

2017: Mohsni, S. Sabbatical Research Grant (\$25,000.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2013: Mohsni, S. SSHRC SIG Sub-Grant, Grantee, Carleton University, CORIS. [Status: Pending]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2017: Multinational Finance Society, Limassol, Cyprus. March 2017

2012: Northern Finance Association (NFA) Conference, Niagara Falls, Canada-Ontario.

2012: World Finance Conference, Shanghai, China.

Chair: Conference / Track / Program

2018: World Finance Conference, Port Louis, Mauritius.

2012: World Finance Conference, Shanghai, China.

Other Professional Service Activities

2020: Social Sciences and Humanities Research Council. External Referee/Reviewer

Reviewer - External Tenure

2024: Fonds de recherche du Québec.

2023: Canadian Journal of Administrative Science.

2023: Journal of International Financial Markets, Institutions & Money.

Reviewer: Ad Hoc Reviewer for a Journal

2018: Canadian Journal of Administrative Sciences.

Scholarly Work in Progress

Papers Under Review

Lajili, K., Mohsni, S., Polizzi, S., & Enzo, S. (2023). "Credit risk disclosure and value relevance in the banking sector: Empirical evidence from Canada and Italy," Revised and resubmitted to *Review of Quantitative Finance and Accounting*.

Mohsni, S., Otchere, I., & Kazuo, Y. (2020). "Passive Trading and Performance: A Quasi Natural Experiment using the Stock Exchange Merger in Japan," 1st revise and resubmit to *Pacific Basin Finance Journal*.

Mohsni, S., Otchere, I., & Saquib, S. (2020). "Board gender diversity, firm performance and risk-taking in developing countries: the moderating role of culture," 1st revise and resubmit to *Journal of International Financial Markets, Institutions and Money*.

Working Papers

Mohsni, S., Otchere, I., & Firoozi, M. (2022). "Board Gender Diversity Policy and Firm Governance, Performance and Risk-Taking: the Case of Canada."

Firoozi, M. & Mohsni, S. (2022). "Cybersecurity Disclosure in the Banking Industry: A Comparative Study."

Mohsni, S. & Alia, S. (2020). "Board Gender Diversity and Firm Performance: The role of firm size."

Mohsni, S. & Mohammad, H. (2019). "Corporate Governance and R&D Investment: The Role of Capital Structure."

Mohsni, S. & Hussain, M. (2019). "Corporate Governance and Firm Risk-Taking: The Moderating Role of Board Gender Diversity."

Mohsni, S., Otchere, I., & Zhang, Y. (2019). "Innovation and Spinoffs."

Lajili, K., Mohsni, S., & Scannella, E. (2019). "Recent developments in credit risk management disclosure: a comparative analysis between Canadian and Italian banks."

Mohsni, S., Lambe, B., & Otchere, I. (2017). "Female CEOs and risk taking behavior: A comparative Analysis between the US and Europe."

Description: Work in Progress

Mohsni, S., Otchere, I., & Yamada, K. (2017). "Passive Trading and Performance: A Quasi Natural Experiment using the Stock Exchange Merger in Japan."

Description: Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	FINA5502	Corporate Finance	0.25	150	Main	100%
2024/Winter	FINA5502	Corporate Finance	0.25	23	Main	100%
2024/Winter	FINA5502	Corporate Finance	0.25	15	Main	100%
2024/Winter	BUSI4500	Advanced Corporate Finance	0.5	34	Main	100%
2024/Winter	FINA5505	Corporate Finance - Master of Finance	0.25	15	Main	100%

2023/Fall	FINA5502	Corporate Finance	0.25	120	Main	100%
2023/Fall	BUSI4500	Advanced Corporate Finance	0.5	25	Main	100%
2023/Fall	BUSI3500	Applied Corporate Finance	0.5	25	Main	100%
2023/Fall	BUSI3500	Applied Corporate Finance	0.5	22	Main	100%
2023/Summer	FINA5502	Corporate Finance	0.25	51	Main	100%
2023/Winter	FINA5512	Valuation	0.25	1	Main	100%
2023/Winter	FINA5502	Corporate Finance	0.25	23	Main	100%
2022/Winter	FINA5502	Corporate Finance	0.25	20	Main	100%
2022/Winter	BUSI4500	Advanced Corporate Finance	0.5	50	Main	100%
2022/Winter	FINA5502	Corporate Finance	0.25	28	Main	100%
2021/Fall	FINA5502	Corporate Finance	0.25	14	Main	100%
2021/Fall	BUSI4500	Advanced Corporate Finance	0.5	46	Main	100%
2021/Fall	BUSI3500	Applied Corporate Finance	0.5	45	Main	100%
2021/Fall	BUSI3500	Applied Corporate Finance	0.5	45	Main	100%
2021/Winter	FINA5502	Corporate Finance	0.25	24	Main	100%
2021/Winter	BUSI4500	Advanced Corporate Finance	0.5	48	Main	100%
2020/Fall	BUSI3500	Applied Corporate Finance	0.5	43	Main	100%
2020/Fall	BUSI3500	Applied Corporate Finance	0.5	46	Main	100%
2020/Fall	BUSI4500	Advanced Corporate Finance	0.5	41	Main	100%
2020/Winter	FINA5502	Corporate Finance	0.25	28	Main	100%
2020/Winter	BUSI4500	Advanced Corporate Finance	0.5	51	Main	100%
2020/Winter	FINA5502	Corporate Finance	0.25	26	Main	100%
2019/Fall	BUSI4500	Advanced Corporate Finance	0.5	26	Main	100%
2019/Fall	BUSI3500	Applied Corporate Finance	0.5	34	Main	100%
2019/Fall	BUSI3500	Applied Corporate Finance	0.5	40	Main	100%
2019/Winter	BUSI4500	Advanced Corporate Finance	0.5	42	Main	100%
2019/Winter	BUSI4500	Advanced Corporate Finance	0.5	26	Main	100%
2018/Fall	BUSI3500	Applied Corporate Finance	0.5	41	Main	100%
2018/Fall	BUSI3500	Applied Corporate Finance	0.5	33	Main	100%
2018/Winter	BUSI4500	Advanced Corporate Finance	0.5	43	Main	100%
2018/Winter	BUSI4500	Advanced Corporate Finance	0.5	50	Main	100%
2018/Winter	FINA5512	Valuation	0.25	25	Main	100%
2017/Fall	FINA5501	Financial Management	0.25	33	Main	100%
2017/Fall	FINA5501	Financial Management	0.25	37	Main	100%
2016/Winter	BUSI4500	Advanced Corporate Finance	0.5	33	Main	100%
2016/Winter	BUSI4500	Advanced Corporate Finance	0.5	24	Main	100%
2016/Winter	BUSI2505	Business Finance	0.5	77	Main	100%

2016/Winter	BUSI2505	Business Finance	0.5	93	Main	100%
2015/Fall	BUSI4515	Micro Finance	0.25	8	Main	50%
2015/Fall	FINA5515	Micro Finance	0.25	27	Main	50%
2015/Fall	BUSI6500	Seminar in Finance I	0.25	6	Main	50%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2013-2014: Supervisor, Michael Pape

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Research Reports

2015: Mohsni, S., & Otchere, I., Risk taking behavior of privatized banks., submitted to Privatization Barometer.

Curriculum Vitae - Sprott School of Business

Steven Muegge, PhD
Associate Professor - Tenured, 2016
Sprott School of Business (Entrepreneurship)
Telephone: 613-520-2600 x6804
Email: smuegge@sce.carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0003-2312-5407>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Carleton University.

Title: *Institutions of participation: A nested case study of company participation in the Eclipse Foundation, community, and business ecosystem. Supervised by Dr. Gerry Grant.*

Master of Engineering. Carleton University, Department of Systems and Computer Engineering.

Title: *Corporate ventured technology spin-offs: A grounded theory of decision and resource environments. Supervised by Dr. John Callahan.*

Bachelor of Engineering. McMaster University.

Professional Certifications

Project Management Professional (PMP), 2001, Project Management Institute (PMI), Newtown Square, Pennsylvania, USA.

B. EMPLOYMENT

Academic Appointments

Academic Director, TIM Program, Carleton University (2022 - Present), Ottawa, Canada-Ontario.

Associate Professor, Sprott School of Business, Carleton University (2016 - Present), Ottawa, Canada-Ontario.

Assistant Professor, Sprott School of Business, Carleton University (2011 - 2016), Ottawa, Canada-Ontario.

Lecturer, Department of Systems and Computer Engineering, Carleton University (2006 - 2010), Ottawa, Canada-Ontario. 4-year term faculty appointment

Sessional Lecturer, Sprott School of Business, Carleton University (2005 - 2006), Ottawa, Canada-Ontario.

Research Associate, Telfer School of Management, University of Ottawa (2004 - 2006), Ottawa, Canada-Ontario.

Teaching Assistant, Sprott School of Business, Carleton University (2004 - 2005), Ottawa, Canada-Ontario.

Other Employment

R&D Manager/Engineering Manager/Project Manager, Nortel Networks (1997 - 2002), Ottawa, Canada-Ontario. Program Manager: Program Manager of the OPTera Connect LX Connection Manager, a network product for the optical metropolitan area network (MAN). Managed the interdependencies of a 60-person product development group including design engineering, verification, operations, brand management, and customer care.

Project Manager of the OPTera Metro Network Modeling Tool, a specialized software application for designing the fiber links of optical metropolitan area networks. Delivered on an aggressive schedule to deploy product to lead customers within sixteen weeks of project launch. Exceeded expectations by deploying to over 200 engineers and network architects within fourteen weeks.

Hardware Manager: Founded a Technology Applications team to prototype new hardware concepts. Recruited seven digital and mechanical designers.

Managed external contractors for firmware development, circuit board layout, and mechanical design. Managed the end-to-end supply chain and knowledge transfer to manufacturing. Senior Engineer 1998-1999 Project Manager of Geneva, a prototype Terabit IP router. Led a global collaborative team including development partners in the USA and Europe and a portfolio of more than thirty component suppliers. Demonstrated a ten-fold improvement in bandwidth density over existing product. Technology and knowhow adopted into Nortel product lines, including XA-Core and Passport. Technical Project Manager of Passport 8250, a network access product for ATM networks. Managed development activities of hardware, software, and verification groups. Product adopted into Nortel Passport portfolio. Team Leader of the OC-768 Feasibility Assessment. Led a team of seven senior designers and architects to analyze the technology and business challenges of next-generation optical transport for the Nortel OPTera HDX product line.

Engineering Analyst 1996-1997 Developed and analyzed business solutions for ATM edge access, including PBX voice services, Ethernet data services, T1 trunking, and DSL. Managed a crossfunctional project to develop tools and processes and for faster business cases.

Industrial Researcher / Design Engineer / Architect, Nortel Networks (1995 - 1997), N/A, Unknown. Conducted applied industrial research of high-speed electronic materials, hardware miniaturization technologies, and microelectronic packaging.

Team Leader of Voyageur, a concept prototype of a robust wireless cell site. Developed technology that saved \$25M in installation and maintenance costs for Nortel customers and produced five patent applications for Nortel. Received the 1997 Merit Award for Innovation from the Assistant Vice President of the Bell-Northern Research Physical Design and Technology organization.

Physical Architect of On Ramp, a network product for ATM data networks. Pioneered the first Nortel application of four novel hardware miniaturization

technologies to achieve the world's smallest 16-port ATM switch.

Hardware Designer of electrical and mechanical prototypes. Performed schematic capture, circuit board layout, mechanical design, assembly, and test.

Research Assistant, Bell-Northern Research (1993 - 1994), Ottawa, Canada-Ontario. Design and execution of experiments. Statistical data analysis.

Numerical modelling of heat transfer and mechanical stress. Scanning electron microscopy.

C. PROFESSIONAL HONOURS

2021: Faculty Graduate Mentoring Award, Carleton University.

2010: Capital Educators' Award, Ottawa Network For Education. The Capital Educators' Awards have two criteria: (1) a demonstrated excellence in teaching, and (2) acting as a positive role model and making a difference in someone's life. Nominations are accepted from current and former students, parents and professional colleagues. The awards are open to all educators employed by the four publicly-funded school boards, two colleges and four universities located within the City of Ottawa. A panel of judges representing business, education and community-based organizations selected 67 finalists from the more than 450 nominated educators. There were 16 award recipients..

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		3		3
Articles-in-Progress (All)	3	5		8
Publications in Conference Proceedings (Refereed)	1	4		5
Paper Presentations (Refereed)		1		1
Grants - Funded (both refereed and non-refereed)		5		5
Totals	4	18		22

Refereed Scholarly Publications

Articles in Refereed Journals

Muegge, S., & Sandstorm, G. (2021). Editorial: Distributed ledger technologies for smart digital economies. *Technology Innovation Management Review*, 11 (6), 3-5. [C]

Shaw, J. A., & Muegge, S. (2021). Ecosystems, design, and glocalization: A multi-level study of Technovation. *Technology Innovation Management Review*, 11 (5), 32-43. [C]

Weiss, M., & Muegge, S. (2019). Conceptualizing a New Domain Using Topic Modeling and Concept Mapping: A Case Study of Managed Security Services for Small Businesses. *Technology Innovation Management Review*, 9 (8), 55-64. [C]

Muegge, S., & Reid, E. (2019). Elon Musk and SpaceX: A Case Study of Entrepreneurship as Emancipation. *Technology Innovation Management Review*, 9 (8), 18-29. [C]

Muegge, S. M. (2017). A game theory perspective on product development project charters: The project manager - project sponsor relationship as an iterated Prisoner's Dilemma. *International Journal of Project Organization and Management*, 9 (1), 57-82.

Published online in 2016 (open access; CC-BY 4.0 license).

Muegge, S. M., & Mezen, M. (2017). Business ecosystems and new venture business models: An exploratory study of participation in the Lead to Win job-creation engine. *International Journal of Technology Management*, 75 (1/2/3/4), 157-192. [B]

- Special issue on "Leveraging technological change: The role of business models and ecosystems"
- Journal is rated "B" on the 2013 ABDC quality list; 2014 IF: 0.625
- Adapted from a Master of Applied Science thesis supervised in 2014
- Co-authored with a graduate student

Muegge, S. M., & Craigen, D. (2015). A design science approach to construct critical infrastructure and communicate cybersecurity risks. *Technology Innovation Management Review*, 5 (6), 6-16. [C]

Payette, J., Anegebe, E., Caceres, C., & Muegge, S. M. (2015). Security by design: Cybersecurity extensions to project management maturity models for critical infrastructure projects. *Technology Innovation Management Review*, 5 (6), 26-34. [C]

Low, A., & Muegge, S. M. (2013). Keystone business models for network security processors. *Technology Innovation Management Review*, 3 (7), 25-35. [C]

Muegge, S. M. (2013). Platforms, communities, and business ecosystems: Lessons learned about technology entrepreneurship in an interconnected world. *Technology Innovation Management Review*, 3 (2), 5-15. [C]

Bailleti, A., Bot, S., Duxbury, T., Hudson, D., McPhee, C., Steven M. Muegge, M. Weiss, J. Wells, M. Westerlund (2012). An Overview of Four Issues on Technology Entrepreneurship in the TIM Review. *Technology Innovation Management Review*, 2 (6), 28-34. [C]

Muegge, S. M. (2012). Business model discovery by technology entrepreneurs. *Technology Innovation Management Review*, 2 (4), 5-16. [C]

- This article has been reprinted twice as chapters in edited books.
- Reprinted as chapter 1 of S. M. Muegge & Claude Haw (Eds.), *Business Models: Best of TIM Review*, Talent First Network.
- Reprinted as chapter 10 of T. Bailetti & B. Hurley (Eds.), *Best of TIM Review for Technology Entrepreneurs*, Talent First Network.
- Fourth most popular TIM Review article published in the 12 issues between October 2011 and September 2012. Source: <http://timreview.ca/article/632>

Muegge, S. M. (2011). Business ecosystems as institutions of participation: A systems perspective on community-developed platforms. *Technology Innovation Management Review*, 1 (2), 4-13. [C]

Articles in Refereed Conference Proceedings

Full Paper

Shaw, J., & Muegge, S. (2020). Localization of a global technology entrepreneurship challenge for girls. *IAMB Virtual Management Conference*.

Zakurdaeva, A., Weiss, M., & Muegge, S. (2020). Detecting architectural integrity violation patterns using machine learning. *ACM/SIGAPP Symposium on Applied Computing*.

Shaw, J., & Muegge, S. (2020). Ecosystem design and glocalization: A multi-level study of Technovation. *ISPIM Connects*.

Reid, E., & Muegge, S. (2019). Elon Musk and SpaceX: A study of entrepreneuring as emancipation. *ISPIM Connects Ottawa*.

Weiss, M., & Muegge, S. (2019). Managed security services for small businesses: A literature review using topic modeling. *ISPIM Connects Ottawa*.

Muegge, S., & Murshed, M. (2018). Time to discover and fix software vulnerabilities in open source software projects: Notes on measurement and data availability. *Portland International Conference on Management of Engineering and Technology*.

PICMET '18, August 19-23, Honolulu, Hawaii, USA).

Muegge, S., Bailetti, A., & Sunna, A. (2018). A design perspective on business ecosystems: Intentional reuse of components. *ISPIM Conference*. March 25-28 2018, Boston.

Muegge, S., & Reid, E. (2018). Richard Branson and Virgin Galactic: A case study of entrepreneuring as emancipation. *Portland International Conference on Management of Engineering and Technology*.

PICMET '18, August 19-23, Honolulu, Hawaii, USA

Muegge, S., Bailetti, T., & Sunna, A. (2018). A design perspective on business ecosystems: Intentional reuse of components. *ISPIM Innovation Forum 2018*.

March 25-28, Boston, USA). Shortlisted for the ISPIM Impact Award (one of three finalists for best paper)

Westerlund, M., Bailetti, T., Muegge, S., & Weiss, M. (2017). Towards smart cities: Residential interest in community platforms. *ISPIM Innovation Forum*.

March 19-22, Toronto, Canada

Westerlund, M., Muegge, S., Bailetti, A., & Weiss, M. (2017). Motivation for continued contribution to an open access innovation journal. *ISPIM Innovation Symposium*.

March 19-22, Toronto, Canada.

Abualhaol, I., & Muegge, S. M. (2016). Securing D2D wireless links by continuous authenticity with legitimacy patterns. *Hawaii International Conference on System Sciences (HICSS)*.

Accepted for presentation and inclusion in the Proceedings at the 49th Hawaii International Conference on System Sciences (HICSS-49, January 5-8, Kauai, Hawaii, USA)

Forthcoming.

Muegge, S. M., & Grant, G. (2013). An institutional perspective on participation in business ecosystems, communities, and platforms. *Academy of Management (AOM)*.

August 9-13, 2013. Lake Buena Vista, Florida, USA.

Muegge, S. M. (2011). Business ecosystems as metaphor, label, and analogy. *Academy of Management (AOM)*.

August 12-16, 2011. San Antonio, Texas, USA.

Muegge, S. M., & Weiss, M. (2010). Open source software projects as opportunities for student learning and value creation. *International Conference on Education and New Learning Technologies (EDULEARN)*.

July 5-7, 2010. Barcelona, Spain.

Muegge, S. M., Bailetti, A., King, D., Tanev, S., & Weiss, M. (2010). Distance education with BigBlueButton. *International Conference on Education and New Learning Technologies (EDULEARN)*.

EDULEARN19. July 5-7, 2010. Barcelona, Spain.

Edited Books

Muegge, S. M., & Haw, C. (Eds.). (2013). *Business models for entrepreneurs and startups: Best of TIM Review*.

Description: Foreword by Sir Terrence H. Matthews, Founder and Chairman of the Board, Mitel Networks Corporation.

Content includes sixteen chapters by sixteen authors and an original preface co-authored by the editors.

ISBN: 978-0-7709-0559-0.

Chapters in Edited Books

Bailetti, A., Weiss, M., Muegge, S., & Westerlund, M. (2014). Lead To Win: An ecosystem approach to making universities more entrepreneurial. In A. Meerman & T. Kiewe (Eds.), *UIIN Good Practice Series 2014: Fostering University-Industry Relationships, Entrepreneurial Universities and Collaborative Innovation* (pp. 397-408). University Industry Innovation Network. [Status: Published]

Muegge, S. M. (2013). Business model discovery by technology entrepreneurs. In T. Bailetti & B. Hurley (Eds.), *Best of TIM Review for Technology Entrepreneurs*. Talent First Network. [Status: Published]

Description: Reprint of an article published in the April 2012 issue of the TIM Review.

Muegge, S. M. (2013). Business model discovery by technology entrepreneurs. In S.M. Muegge & C. Haw (Eds.), *Business models: Best of TIM Review*. Talent First Network. [Status: Published]

Description:

Reprint of an article published in the April 2012 issue of the TIM Review.

Other (Non-refereed) Scholarly Publications

Other Publications

Other Publications

2015: McPhee, C., Craigen, D., & Muegge, S., *Editorial: Critical infrastructures and cybersecurity*. Technology Innovation Management Review, 5(6): 3-5

2013: McPhee, C., & Muegge, S., *Editorial: Platforms, communities and business ecosystems*. (February 2013). Technology Innovation Management Review, 3(2): 3-4.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Guest Editor of Journal

2021: Technology Innovation Management Review (Regional).

2015: Technology Innovation Management Review (International). June 2015. (Co-edited with Dan Craigen). Theme: Critical infrastructures and cybersecurity. Content: Four peer-reviewed articles, an editorial, and a report on a public lecture.

2013: Technology Innovation Management Review (International). Theme: Platforms, communities and business ecosystems. Content: Four peer-reviewed articles, an editorial, and a report on a public lecture. One of the ten most popular issues of the TIM Review (ranking compiled for the 100th issue, November 2015, based on number of page views at the journal website).

Presentations

Papers Presented at Conferences

Refereed

Muegge, S. & Dixon, F. (2021). *Delivering effective hybrid classes*. OLC Innovate 2021: Education Reimagined, Virtual, Virtual.

Bailetti, A., Muegge, S., Weiss, M., & Westerlund, M. (2014, April). *An ecosystem approach to making universities more entrepreneurial*. University-Industry Interaction (UIIN) Conference, Barcelona, Spain.

Bailetti, A. & McPhee, C. (2012). *Leadership position in technology entrepreneurship and commercialization*. TIM Lecture Series, Ottawa, Canada-Ontario.

Other Presentations

Keynote Address

2021: Keynote presentation: Overview of the BigBlueButton Foundation.

Presentation

2020: AI for Local Value. Convocation: AI for Local Value. Presentation to the inaugural graduating class of the AI for Local Value program

2019: Machine Learning & Artificial Intelligence Ottawa Poster Session, Ottawa, Canada-Ontario. Detecting port scan activity in network traffic flows with machine learning

2018: WikiSuite Unconference, Montreal, Canada-Quebec. Weiss, M., & Muegge, S. M. 2018. Architectural integrity monitoring and the WikiSuite stack

2018: TiE Institute, Nepean, Canada-Ontario. Muegge, S. M., & Dixon, F. 2018. Open source secret sauce for entrepreneurs

2015: Lead To Win Bootcamp. Develop strong business models (March 24).

2015: IEEE International Humanitarian Technology Conference, Ottawa, Canada-Ontario. Muegge, S. M. [panelist]. 2015. Panel on humanitarian and open source entrepreneurship experiences and initiatives. IEEE International Humanitarian Technology Conference (IHTC) (June 1). Organized by the IEEE Young Professionals.

2015: Symposium of the Laboratory for Analytic Sciences, Raleigh, North Carolina. Muegge, S. M., Amin, A., Budiman, C., Gad, M., Horsfall, F., & Shah, A. 2015. Emergent techniques for developing and detecting cyber attacks. Poster presentation at the 2015 Symposium of the Laboratory for Analytic Sciences (LAS, December 4, North Carolina State University).

2015: Symposium of the Laboratory for Analytic Sciences, Raleigh, North Carolina. Muegge, S. M., Amin, A., Budiman, C., Gad, M., Horsfall, F., & Shah, A. 2015. Venus cybersecurity. Poster presentation at the 2015 Symposium of the Laboratory for Analytic Sciences (LAS, December 4, North Carolina State University).

2013 – 2015: Lead To Win Cybersecurity Bootcamp. Validate assertions to make money

2014: University-Industry Interaction Conference, Barcelona, Spain. Bailetti, T., Weiss, M., Muegge, S. M., & Westerlund, M. 2014. An ecosystem approach to making universities more entrepreneurial. University-Industry Interaction Conference (April 23-25).

2014: International Astronautical Congress, Toronto, Canada-Ontario. Reid, E., & Muegge, S. M. 2014. Lean product development in the commercial space era. Poster presentation at the 65th International Astronautical Congress (IAC, September 29-October 3).

2012: TIM Lecture Series, Ottawa, Canada-Ontario. Bailetti, T., Muegge, S. M., Weiss, M., McPhee, C., Duxbury, T., & Hudson, D. "Leadership position in technology entrepreneurship and commercialization"(May 31, Carleton University).

2011 – 2012: Lead To Win Bootcamp. Profit formulas and capabilities.

2010: Lead To Win Bootcamp. Develop strong business models.

Contract or Other Research

Research Grants and Awards

Grants

2023: Muegge, S. Accelerate (\$11,250.00), Principal Investigator, PRI-Mitacs. [Status: Funded]

2023: Muegge, S. Accelerate (\$3,750.00), Principal Investigator, Spectergy. [Status: Funded]

2022: Muegge, S. Accelerate (\$9,375.00), Principal Investigator, PRI-Mitacs. [Status: Funded]

2022: Muegge, S. Accelerate (\$5,625.00), Principal Investigator, Global Advantage Consulting Group Inc. [Status: Funded]

2019 [Year 2 of 2]: Bailetti, A. & Muegge, S., Unreported Carleton In-kind, Collaborator, PRI-Carleton University. [Status: Funded]

2018 [Year 5 of 5]: Muegge, S. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 1 of 2]: Bailetti, A. & Muegge, S., Unreported Carleton In-kind, Collaborator, PRI-Carleton University. [Status: Funded]

2017 [Year 4 of 5]: Muegge, S. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2017 [Year 1 of 6]: Muegge, S. & Thomas, K., Collaborative Research and Training Experience, Co-Investigator, PRI-Carleton University. [Status: Not Funded]

2016 [Year 3 of 5]: Muegge, S. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2016 [Year 1 of 6]: Muegge, S. & Kunz, T., Collaborative Research and Training Experience, Co-Investigator, GOV-Natural Sciences and Engineering Research Council of Canada (NSERC). [Status: Not Funded]

2015 [Year 2 of 5]: Muegge, S. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2014 [Year 1 of 5]: Muegge, S. Insight Grant (\$285,420.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2013: Muegge, S. Insight Development Grant (\$74,922.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Moderator / Facilitator

2018: Industry Jam@ISPIM hot topics discussion -ISPIM Innovation Forum, Boston, Massachusetts. Design claims for platforms and ecosystems: Which design choices lead to which design goals?

2017: Industry Jam@ISPIM hot topics discussion -ISPIM Innovation Forum, Toronto, Canada-Ontario. Innovation ecosystems research: What's hot? What's not?

Academic Conference: Panelist

2018: READ Initiative, Carleton University, Ottawa, Canada-Ontario. Panel on entrepreneurship in the accessibility space. Enable Ottawa (April 27).

Board Member: Advisory Board

2013 – 2018: Lead to Win, Ottawa, Canada-Ontario. Founding member of the Lead to Win Council, the advisory body of the Lead to Win business ecosystem; primary responsibility for ecosystem health and growth. Lead To Win is one of the top 10 university business incubators in North America according to the 2015 UBI Global rankings

2010 – 2011: Open Source Business Resource. An on-line open access publication of the Talent First Network [The OSBR became the TIM Review in October 2011]

Board Member: PRJ Editorial Review Board

2011 – 2019: Technology Innovation Management Review.

Board of Directors: Substantial Involvement

2010 – 2011: Technology Venture Challenge. Member of the Board of Directors, and member of the organizing committee, Technology Venture Challenge business plan competition (<http://techvc.org>).

Keynote Address

2021: Keynote presentation: Overview of the BigBlueButton Foundation.

Member: Committee/Task Force

2016 – 2022: ISPIIM Platforms and Ecosystems SIG. ISPIIM Platforms and Ecosystems SIG, founding member of the leadership group

2010 – 2022: International Federation for Information Processing. Working Group on Open Source Software

2019: iHack Ottawa, Ottawa, Canada-Ontario. Organizing committee, iHack Ottawa 2019, June 15-16, Ottawa, Canada (cybersecurity conference and capture-the-flag event)

2010: IEEE International Conference on Management of Innovation & Technology, Singapore, Singapore.

2010: International Conference on Open Source Systems, Notre Dame, Indiana.

Other Professional Service Activities

2018: Space Apps Ottawa, Ottawa, Canada-Ontario. Member of the judging panel, the Ottawa region hackathon for the NASA International Space Apps Challenge

2018: Canada India Accelerator Program, Ottawa, Canada-Ontario. Review panelist: transnational soft-landing program operated by the Carleton University Canada-India Centre.

2017: Ontario Postsecondary Education Quality Assessment Board (PEQAB). Quality assessment panel subject matter expert, Post secondary education quality assessment board (PEQAB), Review of an application from St. Clair College of Applied Arts and Technology for consent to offer an Honours Bachelor of Business Administration (Information Communication Technology) program.

2014: ISPIIM Americas Conference, Montreal, Canada-Quebec. Tanev, S., Muegge, S. M., & Westerlund, M. 2014. Managing innovation in the cyber security technology sector: Bringing together technology entrepreneurship and research opportunities. Workshop at the 2014 ISPIIM Americas Innovation Forum (October 5-8).

2010 – 2012: Carleton Entrepreneurs., Ottawa, Canada-Ontario. Review panellist

Reviewer: Ad Hoc Reviewer for a Journal

2010 – 2022: Technology Innovation Management Review.

Reviewer: Conference Paper

2010 – 2022: Academy of Management Meeting. - Technology & Innovation Management division (TIM): 10 years

- Entrepreneurship division (ENT): 7 years (since 2010)

- Organization & Management Theory division (OMT): 5 years (until 2012)

2018: ISPIIM Conference, Stockholm, Sweden.

2016: ISPIIM Innovation Forum, Boston, Massachusetts.

2016: ISPIIM Conference, Porto, Portugal.

2014: ISPIIM Americas Conference, Montreal, Canada-Quebec.

2012: Americas Conference on Information Systems, Seattle, Washington.

2010: Administrative Sciences Association of Canada (ASAC), Regina, Canada-Saskatchewan.

Scholarly Work in Progress

Papers Under Review

Reid, E. & Muegge, S. (2019). "Elon Musk and SpaceX: A study of entrepreneurship as emancipation," Initial submission to *ISPIIM Connects*.

Description: • Extended outline under review (decision expected January 11)

• Full paper to be submitted March 1

• Second in a series of three case study publications adapted from a Master of Applied Science thesis supervised in 2018

Muegge, S. & Weiss, M. (2019). "Managed security services for small businesses: A literature review using topic modeling.," Initial submission to *ISPIIM Connects*.

Description: • Extended outline under review (decision expected January 11)

- Full paper to be submitted March 1

Working Papers

Flanagan, L. & Muegge, S. (2022). "Switching gears: Organizational structure and KIBS-to SaaS-based business model transitions.."

Rajendra, V. P. & Muegge, S. (2022). "Auto-generated requirements specifications with machine learning for product development.."

Muegge, S. & Reid, E. (2019). "Emancipated entrepreneuring in the space industry: Authoring and organizational forms by Branson, Diamandis, and Musk," targeted for Entrepreneurship, Theory and Practice.

Description: Adapted from a Master of Applied Science thesis supervised in 2018

Muegge, S. & Low, A. (2019). "Evolution of platform strategies in the electronic design automation industry," targeted for Research Policy.

Description: Adapted from a Master of Applied Science thesis supervised in 2013

Muegge, S. & Reid, E. (2019). "Peter Diamandis and XPRIZE: A case study of entrepreneuring as emancipation.," targeted for Technology Innovation Management Review.

Description: Third in a series of three case study publications adapted from a Master of Applied Science thesis supervised in 2018

Muegge, S., Weiss, M., & Eseraigbo, P. (2019). "Security triage processes in open source software projects: A multiple case study of the WikiSuite stack.," targeted for International Conference on Open Source Systems.

Description: • Full paper to be submitted January 13

• Adapted from a Master of Engineering project supervised in 2018

Muegge, S. & Murshed, M. (2018). "An investigation of open source software vulnerability reports using publicly-available databases."

Description: June 8-10 2018, Athens, Greece.

• Adapted from a Master of Applied Science thesis supervised in 2016

Muegge, S. & Low, A. (2018). "Evolution of platform strategies in the electronic design automation industry.," targeted for Research Policy.

Description: Under development. Adapted from a Master of Applied Science thesis supervised in 2013.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2023/Fall	TIMG5001	Principles of Technology Innovation Management	0.5	76	Main	100%
2023/Fall	TIMG5001	Principles of Technology Innovation Management	0.5	18	Main	100%
2023/Summer	TIMG5909	M.A. Sc Thesis	0	5	Main	100%
2023/Summer	TIMG5907	M.A.B.A. Project	1	4	Main	100%
2023/Summer	TIMG5905	M.Ent. Project	1	4	Main	100%
2023/Summer	TIMG5901	M.Eng Project	1	6	Main	100%
2023/Summer	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	32	Main	100%
2023/Winter	TIMG5905	M.Ent. Project	0.6	4	Main	100%
2023/Winter	TIMG5901	M.Eng Project	0.6	8	Main	100%
2023/Winter	TIMG5907	M.A.B.A. Project	1	8	Main	100%
2023/Winter	TIMG5001	Principles of Technology Innovation Management	0.5	30	Main	100%
2022/Fall	TIMG5907	M.A.B.A. Project	1	16	Main	100%
2022/Fall	TIMG5001	Principles of Technology Innovation Management	0.5	73	Main	100%
2022/Fall	TIMG5901	M.Eng Project	0.6	14	Main	100%
2022/Fall	TIMG5905	M.Ent. Project	0.6	10	Main	100%
2022/Fall	TIMG5909	M.A. Sc Thesis	0.6	5	Main	100%
2022/Fall	TIMG5104	Directed Studies: Technology Innovation Management	0.5	2	Main	100%
2022/Summer	TIMG5004	Research Methods in Technology Innovation Management	0.5	15	Main	100%
2022/Summer	TIMG5901	M.Eng Project	0.6	9	Main	100%
2022/Summer	TIMG5905	M.Ent. Project	0.6	3	Main	100%

2022/Summer	TIMG5909	M.A. Sc Thesis	0.6	6	Main	100%
2022/Summer	TIMG5907	M.A.B.A. Project	0.6	3	Main	100%
2022/Winter	TIMG5201	Technology and Wealth	0.5	41	Main	100%
2022/Winter	TIMG5001	Principles of Technology Innovation Management	0.5	27	Main	100%
2021/Fall	TIMG5001	Principles of Technology Innovation Management	0.5	64	Main	100%
2021/Summer	TIMG5004	Research Methods in Technology Innovation Management	0.5	9	Main	100%
2021/Winter	TIMG5201	Technology and Wealth	0.5	54	Main	100%
2021/Winter	TIMG5104	Directed Studies: Technology Innovation Management	0.5	1	Main	100%
2021/Winter	TIMG5001	Principles of Technology Innovation Management	0.5	49	Main	100%
2020/Fall	TIMG5001	Principles of Technology Innovation Management	0.5	45	Main	100%
2020/Summer	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	33	Main	100%
2020/Winter	TIMG5004	Research Methods in Technology Innovation Management	0.5	19	Main	100%
2020/Winter	TIMG5001	Principles of Technology Innovation Management	0.5	51	Main	100%
2019/Fall	TIMG5001	Principles of Technology Innovation Management	0.5	68	Main	100%
2019/Summer	TIMG5104	Directed Studies: Technology Innovation Management	0.5	2	Main	100%
2019/Summer	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	8	Main	100%
2019/Winter	TIMG5004	Research Methods in Technology Innovation Management	0.5	12	Main	100%
2019/Winter	TIMG5001	Principles of Technology Innovation Management	0.5	19	Main	100%
2018/Fall	TIMG5001	Principles of Technology Innovation Management	0.5	54	Main	100%
2018/Winter	TIMG5001	Principles of Technology Innovation Management	0.5	20	Main	100%
2017/Fall	TIMG5004	Research Methods in Technology Innovation Management	0.5	24	Main	100%
2017/Fall	TIMG5001	Principles of Technology Innovation Management	0.5	35	Main	100%
2017/Winter	TIMG5001	Principles of Technology Innovation Management	0.5	32	Main	100%
2016/Fall	TIMG5004	Research Methods in Technology Innovation Management	0.5	20	Main	100%
2016/Fall	TIMG5001	Principles of Technology Innovation Management	0.5	37	Main	100%
2016/Winter	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	14	Main	100%
2016/Winter	TIMG5001	Principles of Technology Innovation Management	0.5	33	Main	100%
2015/Fall	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	14	Main	100%
2015/Fall	TIMG5001	Principles of Technology Innovation Management	0.5	43	Main	100%
2015/Summer	TIMG5004	Research Methods in Technology Innovation Management	0.5	13	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2019-2020: Abdirahaman Osman, MEng, TIM

2019-2020: Karthikeyan Sankara, MEng TIM

2018-2019: Andre Cavalcanti

2016-2017: Jay Payette

2012-2013: Hala Zohbi

University Assignments

Masters Thesis Committees:

2019-2020: Rashmi Jain, MEng, TIM

University Assignments

Masters Thesis Committees:

2019-2020: Siamak Aminnejad, MEnt, TIM

2018-2019: Supervision, Ala Abu Alkeir

2018-2019: Supervision, Haithm Alshaebi

2018-2019: Supervision, Peter Eseraigbo

University Assignments

Masters Thesis Committees:

2018-2019: Supervision, Stephen Shaw

University Assignments

Masters Thesis Committees:

2018-2019: Supervision, Vanessa Zulaga

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2019-2020 – 2020-2021: Curriculum Review Committee (TIM Steering Committee)

Credentials

Professional Memberships

Academy of Management, N/A

Association for Computing Machinery, N/A

Free Software Foundation, N/A

IEEE (Institute of Electrical and Electronics Engineers), N/A

Open Source Initiative, N/A

Project Management Institute, N/A

Professional Development

Instructional-Related Conference

2015: Canada Moodle Moot. Seminars on educational technology, learning management systems, and distance learning

2014: Educational Development Centre event: "The future of online learning".

2014: Educational Development Centre Teaching and Learning Symposium. "High Impact Practices: Learner Centered Teaching and Engaged Pedagogy" (Oct. 29)

2012: Educational Development Centre event: "Writing to attract interest".

2010: Educational Development Centre: "Classroom Strategies: One Cool Thing I'm Doing...".

Professional Seminars / Workshops

2015: Media Training, Carleton University.

2015: Global Insights. Seminars and workshops on best practices in academic business incubators, organized by UBI Global and Ontario Centres of Excellence (OCE)

Service to the Community

Member of a Committee

2017: Technovation Ottawa, Member of the judging panel, Technovation Ottawa, the Ottawa regional competition for the Technovation Challenge (<http://technovationchallenge.org>). Girls ages 10 to 18 learn to identify a problem in their community, create a mobile application to address that problem, communicate their ideas, and translate their ideas into a fully launched business

Other Community Service Activities

2011 – 2018: Entrepreneurship mentor, Entrepreneurship mentor for multiple programs assisting new venture founders, including Ottawa Young Entrepreneurs (OYE), and Carleton Entrepreneurs (CE).

2013: Apps4Ottawa, Member of the judging panel, Apps4Ottawa: Open Data Applications Contest, sponsored by the City of Ottawa.

Positions Held in Civic Organizations

2013 – 2018: BigBlueButton Foundation, Executive Director of the BigBlueButton Foundation, a membership-based vendor-neutral non-profit company whose mission is to enhance the value of remote students' academic experiences and reduce the costs of delivering these experiences. The BigBlueButton Foundation is the steward of the BigBlueButton open source software project, a community-developed web-conferencing system for online learning and distance education. BigBlueButton was developed by graduate students of Carleton University and the Technology Innovation Management program.

Curriculum Vitae - Sprott School of Business

Luciara Nardon, PhD
Full Professor - Tenured, 2013
Sprott School of Business (International Business)
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AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-8935-198X>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Oregon.

Title: *Focus: International Management. Dissertation title: The role of culture in coping with uncertainty. Dissertation committee: Richard Steers (chair), Richard Mowday and Alan Meyer*

Master of Business Administration. Peter F. Drucker Graduate School of Management, Claremont Graduate University.

Master of Business Administration. Universidad de Ciencias Empresariales y Sociales.

Title: *Focus: Latin American Integration*

Master of Accounting. Fundação Getúlio Vargas.

Title: *Graduate Degree in Accounting*

Bachelor of Science. Universidade Federal do Rio Grande do Sul.

B. EMPLOYMENT

Academic Appointments

Full Professor, Sprott School of Business, Carleton University (July, 2021 - Present), Ottawa, Canada-Ontario.

Associate Professor, Sprott School of Business, Carleton University (July, 2009 - June, 2021), Ottawa, Canada-Ontario. International Business Group

Visiting Assistant Professor of Management, University of Oregon, Charles H. Lundquist College of Business (September, 2008 - June, 2009), Eugene, Oregon.

Assistant Professor, Vlerick Leuven Gent Management School (September, 2006 - August, 2008), Leuven, Belgium. People and Organizations

International Faculty, Copenhagen Business School (2006), Copenhagen, Denmark.

Visiting Assistant Professor of Management, University of Oregon, Charles H. Lundquist College of Business (September, 2005 - June, 2006), Eugene, Oregon.

Graduate Teaching Fellow, University of Oregon, Charles H. Lundquist College of Business (September, 2001 - June, 2005), Eugene, Oregon.

Adjunct Professor of Accounting, Universidade Federal do Rio Grande do Sul (August, 2000 - June, 2001), Porto Alegre, Brazil.

Other Employment

Director, Control Systems and Strategic Planning, Sonae Distribuição Brasil (February, 1999 - February, 2000), Porto Alegre, Brazil.

Financial Analyst, Merchandise Planning and Analysis, Mervyn's Department Store (June, 1998 - January, 1999), Hayward, California.

Control Systems Manager and Planning Supervisor, Cia Real de Distribuição (August, 1990 - December, 1996), Porto Alegre, Brazil.

C. PROFESSIONAL HONOURS

2023: Carol-Ann Tetrault Sirsly award, Sprott School of Business.

2023: Faculty Graduate Mentoring Award, Carleton University.

2018: Research Achievement Award, Carleton University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		15		15
Articles-in-Progress (All)		2		2
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings		1		1

Paper Presentations (Refereed)		30		30
Grants - Funded (both refereed and non-refereed)		26		26
Other Research, Non-refereed		3		3
Totals		77		77

Refereed Scholarly Publications

Articles in Refereed Journals

- Palic, D., Nardon, L., & Hari, A. (2023). Transnational sensemaking narratives of highly skilled Canadian immigrants' career change. *Career Development International*, 28 (4), 392-405. [B]
- Hari, A., Nardon, L., & Zhang, H. (2023). A Transnational Lens into International Student Experiences of the COVID-19 Pandemic. *Global Networks, A Journal of Transnational Affairs*, 23 (1), 14-30. [A]
Open access, published with DOI in 2022
- Kuzhabekova, A., & Nardon, L. (2023). Refugee students' transition from higher education to employment: Setting a research agenda. *Journal of Immigrant & Refugee Studies*, 21 (3). [A,Other]
Published with DOI
volume assigned in 2023
- Zhang, H., Nardon, L., & Sears, G. (2022). Migrant Workers in Precarious Employment: A narrative review. *Equality, Diversity and Inclusion*, 41 (2), 254–272. [B]
Published with DOI Volume assigned in 2022
- Nardon, L., Hari, A., Zhang, H., Hoselton, L., & Kuzhabekova, A. (2022). Skilled immigrant women's career trajectories during the COVID-19 pandemic in Canada. *Equality, Diversity and Inclusion*, 41 (1), 112-128. [B]
Published with DOI
Volume assigned in 2022
- Gulanowski, D., Nardon, L., & Hine, M. (2022). Online Discussion Forum And Pre-migration Information Seeking: An Affordance Perspective. *Journal of International Technology and Information Management*, 31 (2), 110-139. [C]
- Szkudlarek, B., Nardon, L., & Toh, S. (2022). A temporal perspective on refugee employment – Advancing HRM theory and practice. *Human Resource Management Journal*. [A]
Published with DOI
- Szkudlarek, B., Nardon, L., Osland, J., Adler, N. J., & Lee, E. S. (2021). When context matters: what happens to international business theory when researchers study refugees. *Academy of Management Perspectives*, 35 (3), 461-484. [A]
2022 Update: Volume assigned
Forthcoming. Published online 11 September 2019
- Nardon, L., Zhang, H., Szkudlarek, B., & Gulanowski, D. (2021). Identity work in refugee workforce integration: The role of newcomer support organizations. *Human Relations*, 28 (1), 29-51. [A+]
Published, 2022 update
Advance Online Publication-Forthcoming
- Nardon, L., Hari, A., & Aarma, K. (2021). Reflective Interviewing – Increasing Social Impact through Research. *International Journal of Qualitative Methods*, 20. [A,Other]
Published with DOI and volume assigned
- Nardon, L., & Hari, A. (2021). Sensemaking through metaphors: The role of imaginative metaphors in constructing new understandings. *International Journal of Qualitative Methods*, 20, 1-10. [A,Other]
Published with DOI
- Moffit, U. E., Nardon, L., & Zhang, H. (2020). Negotiating Identity and National Belonging in the Public Sphere: Narratives of High-Skilled Work. *International Journal of Intercultural Relations*, 78, 84-95. [A]
Available online 29 July 2019 In Press, Corrected Proof Published in September 2020
- Szkudlarek, B., Osland, J., Nardon, L., & Zander, L. (2020). Intercultural communication in international business – moving the field forward. *Journal of World Business*, 55 (6), 101-126. [A+]
- Lee, E., Szkudlarek, B., Nguyen, D., & Nardon, L. (2020). Unveiling the canvas ceiling: a multidisciplinary literature review of refugee employment and workforce integration. *International Journal of Management Reviews*, 22 (2), 193-216. [A]
- Hine, M., Nardon, L., & Gulanowski, D. (2019). The Role of Emotional Expression in Accessing Social Networks: The Case of Newcomers' Blogs. *Journal of International Technology and Information Management*, 28 (1), 2. [C]
- Nardon, L., & Aten, K. D. (2016). Making sense of a foreign culture through technology: Triggers, mechanisms, and introspective focus in newcomers' blog narratives. *International Journal of Intercultural Relations*, 54, 15-20. [A]
- Aten, K., Nardon, L., & Isabelle, D. (2016). Making Sense of Foreign Context: Skilled Migrant's Perceptions of Contextual Barriers and Career

- Options. *International Journal of Cross Cultural Management*, 16 (2), 191-214. [B]
- Nardon, L., Aten, K., & Gulanowski, D. (2015). Expatriate Adjustment in the Digital Age: The Co-creation of Online Social Support Resources Through Blogging. *International Journal of Intercultural Relations*, 47, 41-55. [A]
- Nardon, L., & Steers, R. M. (2014). Managing Cross-Cultural Encounters: Putting things in Context. *Organizational Dynamics*, 43, 138-145. [A]
- Sanchez-Runde, C., Nardon, L., & Steers, R. M. (2013). The Cultural Roots of Ethical Conflicts in Global Business. *Journal of Business Ethics*, 16 (4), 689-701. [A,FT50]
- Steers, R. M., Sanchez-Runde, C., & Nardon, L. (2012). Leadership in a Global Context: New Directions in Research and Theory. *Journal of World Business*, 47 (4), 479-482. [A+]
- Steers, R. M., Sanchez-Runde, C., & Nardon, L. (2012). Culture, Cognition and Managerial Leadership. *Asia-Pacific Business Review*, 18 (3), 425-439. [B]
- Nardon, L., & Aten, J. (2012). The Value of Virtual Worlds: The Role of Categorization in Technology Assessment. *Journal of the Association for Information Systems*, 13 (10), article 4. [A+]
- Sanchez-Runde, C., Nardon, L., & Steers, R. M. (2011). Looking Beyond Western Leadership Models: Implications for Global Managers. *Organizational Dynamics*, 40 (3), 207-213. [A]
- Nardon, L., Steers, R. M., & Sanchez-Runde, C. (2011). Seeking Common Ground: Strategies for Enhancing Multicultural Communication. *Organizational Dynamics*, 40 (2), 85-95. [A]
- Nardon, L. (2011). Culture, Attention, and Managerial Action: An Application of Quantitative Content Analysis to Textual Data in Brazil and the U.S. *Multidisciplinary Business Review*, 4 (1), 35-47.

Articles in Refereed Conference Proceedings

Full Paper

- Lee, E., Szkudlarek, B., Nguyen, D. C., & Nardon, L. (2018). Refugee workforce integration: an interdisciplinary literature review. In Academy of Management (Ed.) *Academy of Management*, 2018 (1), Briarcliff Manor, NY:, 15575.
- Gulanowski, D., & Nardon, L. (2018). The Role of Online Discussion Forums in Newcomers' Labour Market Integration in Canada. *Administrative Sciences Association of Canada (ASAC)*.
Toronto, Ontario, Canada.
- Aten, K., Nardon, L., & Stanko, T. (2014). Adapting Communication to Create Common Ground in a Virtual World. *International Conference on Information Resources Management (Conf-IRM)*.
May 18-20, 2015. ISBN 978-0-473-32270-0
- Nardon, L., Aten, K., & Gulanowski, D. (2014). The Role of Blogging Technology in Expatriate Adjustment. *Administrative Sciences Association of Canada (ASAC)*.
May 2014. Honourable mention.
- Arya, A., & Nardon, L. (2014). Google It: Critical Thinking and Problem Solving in the Internet Age. *International Conference on Education and New Learning Technologies (EDULEARN)*.
July 7-9, 2014. Barcelona, Spain.
- Nardon, L., Steers, R. M., & Stone, C. (2012). Cognition and Cross-cultural Communication. *Administrative Sciences Association of Canada (ASAC)*.
St. John's, Newfoundland, Canada.
- Nardon, L., Steers, R. M., & Stone, C. (2012). Language, Culture, and Cognition in Cross-cultural Communication. *New Frontiers in Managerial and Organizational Cognition (NFMOC)*.
Dublin, Ireland.
- Nardon, L., Aten, K., & Vesikari-Metcalf, A. (2012). Immigrant Bloggers and Sensemaking: Technology Mediated Acculturation and Sensemaking. *New Frontiers in Managerial and Organizational Cognition (NFMOC)*.
Dublin, Ireland.
- Nardon, L., & Aten, K. (2011). The Value of Virtual Worlds: The Role of Categorization in Technology Assessment. *Administrative Sciences Association of Canada (ASAC)*, 193-211.
Montreal, Quebec, Canada.

Abstract Only

- Aten, K., Nardon, L., & Stanko, T. (2014). Working Out Loud: Adapting Communication to Support Distributed Collaboration. *Academy of Management (AOM)*.
Abstract at the Academy of Management Proceedings 2014 (1), 11002.

Edited Books

- Nardon, L., & Hari, A. (2022). *Making sense of immigrant work integration: an organizing framework* Palgrave.

Chapters in Edited Books

- Aarma, K., & Nardon, L. (2023). A Student-Supervisor Reflection on an Action Research Project on Immigrant Intercultural Development. *Sage Research Methods Case*. [Status: In Press]
- Nardon, L. (2018). Cross-cultural issues in education. In Press, *Oxford Research Encyclopedia of Business and Management*. [Status: InPress]
Description: DOI: 10.1093/acrefore/9780190224851.013.64
Online Publication Date: Feb 2019
- Nardon, L., & Steers, R. M. (2017). Context, Culture and Managerial Behavior. In Steven J. Armstrong (Ed.), *Oxford Handbook of Management* (pp. 481-496). Oxford University Press. [Status: Published]
Description: In Adrian Wilkison, Steven J. Armstrong & Michael Lounsbury (Eds.).
- Nardon, L. (2015). Communication and Diversity. In Elsbach, K., Kayes, A., and Kayes, C. (Eds.), *Contemporary Organizational Behavior: From Ideas to Action*. Pearson. [Status: Published]
- Nardon, L., & Gulanowski, D. (2015). Divergence and Convergence. In Benett, J (Ed.), *Encyclopedia of Intercultural Competence* (pp. 265-268). Thousand Oaks: Sage Publications. [Status: Published]
- Aten, K., Nardon, L., & Steers, R. M. (2014). Rethinking the Role of Management Development in Preparing Global Business Leaders. In Hall R., Grant, D., Raelin, J. (Ed.), *Leadership Development & Practice*. Sage Publications. [Status: Published]
Description: REPRINT of chapter published in 2009.
- Sanchez-Runde, C., Nardon, L., & Steers, R. M. (2012). Accounting for Culture in the Development of Global Leaders. In J. Canals (Ed.), *Leadership Development in a Global World: The role of companies and business schools* (pp. 227-244). Palgrave Macmillan. [Status: Published]
- Nardon, L., & Steers, R. M. (2009). The Culture Theory Jungle: Divergence and Convergence in Models of National Culture. In R. Bhagat and R. Steers (Eds.), *Handbook of Culture, Work, and Organizations* (pp. 3-22). Cambridge University Press. [Status: Published]
- Steers, R. M., Nardon, L., & Sanchez-Runde, C. (2009). Culture and Organization Design: Strategy, Structure and Decision Making. In R. Bhagat and R. Steers (Eds.), *Handbook of Culture, Organizations, and Work* (pp. 71-117). Cambridge University Press. [Status: Published]

Other (Non-refereed) Scholarly Publications

Non-refereed books

- Nardon, L. (2017). *Working in a Multicultural World: A guide for developing intercultural competence* University of Toronto Press.
- Steers, R. M., Nardon, L., & Sanchez-Runde, C. (2016). *Management across Cultures: Developing Global Competencies* (3rd ed.) Cambridge University Press.
- Steers, R. M., Nardon, L., & Sanchez-Runde, C. (2013). *Management across Cultures: Developing Global Competencies* (2nd ed.) Cambridge University Press.
- Steers, R. M., Sanchez-Runde, C., & Nardon, L. (2010). *Managing across Cultures: Challenges and Strategies* Cambridge University Press.

Invited Articles/Review articles

- Butler, C., Minbaeva, D., Mäkelä, K., Maloney, M., Nardon, L., Paunova, M. & Zimmermann, A. (2018). Towards a strategic understanding of global teams and their HR implications: an expert dialogue. *International Journal of Human Resources Management*, 29 (14), 2209-2229.

Other Scholarly Publications

- 2020: Hari, A., & Nardon, L., *Immigrant Women are Falling Behind During the COVID-19 Pandemic, The Conversation*.

Other Publications

Newspaper Articles or Columns

- 2013: Nardon, L., Steers, R., & Sanchez-Runde, C., *Developing Multicultural Competence*.
- 2011: Nardon, L., & Sanchez-Runde, C., *The Delicate Balancing Act of Global Leadership*. In IESE Insight

Other Publications

- 2023: Nardon, L., *Imaginative Metaphor: An Interview Technique to Construct New Understandings*. Sage Research Methods Video Collection on Qualitative and Mixed Methods,
- 2022: Arya, A., Nardon, L., & Riyadh, Md., *Information and Communication Technology in Migration: A Framework for Applications, Customization, and Research*. Arya, A, Nardon, L. & Riyadh, Md. 2022. Information and Communication Technology in Migration: A Framework for Applications, Customization, and Research, Working Paper No. 2022/3, Ryerson Centre for Immigration and Settlement (RCIS) & Canada Excellence Research Chair in Migration & Integration
- 2017: Nardon, L., *Methodological Myth: Interviews are a better data source than documents*. In RM-SIG News, No 3, June 2017, p.8-9. (newsletter)

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Special Issue of a PRJ

- 2019: Human Resources Management Journal (International). The role of HRM in refugee workforce integration - Advancing theory and enhancing practice
- 2019: Journal of World Business (International). Co-editor of a special issue on "Intercultural Communication in International Business"

2017 – 2019: Journal of World Business (International). Co-editor of a special issue on "Intercultural Communication in International Business" at the Journal of World Business, in progress.

2012: Journal of World Business (International). Co-editor of a special issue on "Leadership in a Global Context" at the Journal of World Business, 2012, Volume 47, issue 4.

Presentations

Papers Presented at Conferences

Refereed

Hari, A. & Nardon, L. (2023). *Thinking through social impact in research using autoethnography: ongoing reflections*. Qualitative Research in Management conference, Albuquerque, New Mexico.

Nardon, L., Palic, D., & Hari, A. (2023). *Experiencing careers: a clean language approach to studying career transitions*. Qualitative Research in Management conference, Albuquerque, New Mexico.

Zhang, H. & Nardon, L. (2023). *Socializing Immigrant Jobseekers: The role of pre-employment mentoring*. Academy of Management Meeting, Boston, Massachusetts.

Zhang, H. & Nardon, L. (2023). *Formal Mentoring Programs for Immigrant Employment: What Works and What Doesn't*. Academy of Management Meeting, Boston, Massachusetts.

Aarma, K., Nardon, L., & Hari, A. (2021). *Reflective Interviewing: Increasing Social Impact Through Research*. International Congress of Qualitative Inquiry, Virtual, Virtual.

Zhang, H., Nardon, L., & Sears, G. (2021). *Migrant workers in precarious employment: A narrative review*. Academy of International Business, Virtual, Virtual.

Zhang, H., Nardon, L., & Moffitt, U. (2021). *Constructing Agency in the Public Space: Women Immigrant Narratives of Migration*. Gender, Work & Organization Conference, Canterbury, United Kingdom.

Aarma, K., Nardon, L., & Hari, A. (2021). *Reflective Interviewing: Increasing Social Impact Through Research*. Administrative Sciences Association of Canada, Virtual, Virtual.

Hoselton, L., Gulanowski, D., Nardon, L., & Hari, A. (2021). *The role of social capital and online social support in workforce integration of immigrant women during Covid-19*. Administrative Sciences Association of Canada, Virtual, Virtual.

Nardon, L. & Jones Joannis, E. (2021). *Retraining Hospitality Workers for a Post-Pandemic Career*. Administrative Sciences Association of Canada, Virtual, Virtual.

Palic, D., Nardon, L., & Hari, A. (2021). *Supporting Super-skilled Newcomer Women's Work Integration*. Administrative Sciences Association of Canada, Virtual, Virtual.

Zhang, H. & Nardon, L. (2021). *Global Mobility and Mentoring: A Literature Review*. Administrative Sciences Association of Canada, Montreal, Canada-Quebec.

Nardon, L., Hari, A., Zhang, H., Hoselton, L., & Kuzhabekova, A. (2021). *Skilled immigrant women's career trajectories during the COVID-19 pandemic in Canada*. Metropolis Canada Conference, Montreal, Canada-Quebec.

Hoselton, L., Gulanowski, D., Nardon, L., & Hari, A. (2021). *The role of social capital and online social support in workforce integration of immigrant women during Covid-19*. CRIW Virtual Early Career Researcher Conference, Ottawa, Canada-Ontario.

Gulanowski, D. & Nardon, L. (2020). *Integration of international students through technology*. Academy of International Business Southeast Chapter, Virtual, Virtual.

Zhang, V., Sears, G., & Nardon, L. (2020). *Migrant workers in precarious employment: A narrative review*. European Academy of Management Conference, Virtual, Virtual.

Nardon, L., Kuzhabekova, A., & Hoselton, L. (2020). *Narratives of Return Migration*. Administrative Sciences Association of Canada, Virtual, Virtual.

Moffitt, U., Nardon, L., & Zhang, H. (2019). *Immigrant inclusion and belonging through work narratives*. International Emerging Scholars' Conference, Ottawa, Canada-Ontario.

Moffitt, U. E., Nardon, L., & Zhang, H. (2019). *Work as a Marker of Immigrant Inclusion: Negotiating National Identity and Belonging in the Public Sphere*. International Academy for Intercultural Research Biennial Conference, Shanghai, China.

Description: Shanghai, China, July 2019

Nardon, L. & Kuzhabekova, A. (2019). *A host child in the European family: Immigrants' identity work on the intersection of civic and ethnic nationalism*. International Metropolis Conference, Ottawa, Canada-Ontario.

Description: June 24-28, 2019, Ottawa, Canada.

Nardon, L. (2019). *Working in a multicultural world*. Society for Intercultural Education Training and Research (SIETAR), Atlanta, Georgia.

Nardon, L. & Webb, A. (2019). *Sport in migration stories*. Sport and Society. International Conference on Sport & Society, Toronto, Canada-Ontario.

Zhang, H., Lee, E. S., Nardon, L., & Szkudlarek, B. (2019). *Professional Employment Support and Refugee Labor Integration: A Two-country Analysis*. International Metropolis Conference, Ottawa, Canada-Ontario.

Description: Ottawa, Canada, June 2019.

- Zhang, H., Lee, E. S., Nardon, L., & Szkudlarek, B. (2019). *Refugee labor integration: managing expectations versus realistic idealism*. International Academy for Intercultural Research Biennial Conference, Shanghai, China.
- Zhang, H., Nardon, L., Lee, E. S., & Szkudlarek, B. (2019). *Refugees' labor market integration: managing expectations versus realistic idealism*. Biennial Congress of the International Academy for Intercultural Research, Shanghai, China.
Description: July 2019
- Gulanowski, D. & Nardon, L. (2019). *Migrants' labour market integration through online discussion forums*. STTPA Conference, Mississauga, Canada-Ontario.
Description: October 2019
- Gulanowski, D. & Nardon, L. (2019). *Labour market integration in the information age: Knowledge exchange through online discussion forums*. Academy of International Business, Toronto, Canada-Ontario.
Description: May 2019
- Nardon, L. & Zhang, H. (2019). *The role of social categories in immigrant women's sensemaking of migration*. Administrative Sciences Association of Canada (ASAC), St. Catharines, Canada-Ontario.
- Zhang, H. & Nardon, L. (2019). *Making Sense of Migration: The Role of Social Categories in Women's Migration Narratives*. European Academy of Management, Lisbon, Portugal.
Description: Lisbon, Portugal, June 2019
- Kuzhabekova, A. & Nardon, L. (2019). *Theorizing individual differences in the relationship between immigrant social integration and work*. International Emerging Scholars' Workshop Migration, Identity, and Politics in Europe", Ottawa, Canada-Ontario.
Description: March 1, 2019, Carleton University, Ottawa, Canada.
- Gulanowski, D. & Nardon, L. (2018). *National Culture and Management: A Critical Review and Directions for Future Research*. Academy of International Business, Chicago, Illinois.
- Gulanowski, D. & Nardon, L. (2018). *The Role of Online Discussion Forums in International Migrants' Occupational Integration*. Academy of International Business, Chicago, Illinois.
- Lee, J., Szkudlarek, B., Nguyen, D., & Nardon, L. (2018). *The elephant in the room: IHRM and refugee workforce integration*. Australia and New Zealand International Business Academy, Brisbane, Australia.
- Nardon, L., Zhang, H., Gulanowski, D., & Szkudlarek, B. (2018). *Supporting Refugee Workforce Integration: The Paradox of Managing Expectations and Supporting Professional Identities*. European Academy of Management Conference, Reykjavik, Iceland.
- Lee, J., Szkudlarek, B., Szkudlarek, B., & Nardon, L. (2018, October). *Canvas ceiling – refugee's thorny journey to employment*. International Metropolis Conference, Sydney, Australia.
- Lee, J., Moffitt, U., Nguyen, D., & Nardon, L. (2018, August). *Refugee workforce integration: an interdisciplinary literature review*. Academy of Management, Chicago, Illinois.
- Nardon, L., Moffitt, U., & Zhang, H. (2018, July). *Making sense of inclusion: the role of work in narratives of integration in Canada and the UK*. International Association of Cross-Cultural Psychology Congress, Guelph, Canada-Ontario.
- Nardon, L. (2017). *Making sense of migration: the role of work in migrant narratives*. International Academy of Intercultural Research, Staten Island, New York.
- Gulanowski, D., Zhang, H., Nardon, L., & Szkudlarek, B. (2017). *Supporting newcomers: a critical review*. Academy of International Business (AIB) US Northeast Conference, Philadelphia, Pennsylvania.
Description: October, 2017.
- Nardon, L. & Gulanowski, D. (2017). *Occupational integration of newcomers in the digital age*. Academy of International Business (AIB) US Northeast Conference, Philadelphia, Pennsylvania.
Description: October, 2017.
- Hine, M. & Nardon, L. (2017, June). *Emotional Expression in Newcomer's Blogs: A text analytics approach*. International Academy of Intercultural Research, Staten Island, New York.
Description: 10th Biennial Conference
- Nardon, L., Aten, K., & Stanko, T. (2016). *Communication Competence for Global Virtual Teams*. Academy of International Business (AIB) Annual Meeting, New Orleans, Louisiana.
Description: July 2016.
- Nardon, L., Grant, G., & Wang, Y. (2016). *Socio-cognitive influences on technological innovation, adoption and use*. SSHRC Fall Forum: Imagining Canada's Future, Ottawa, Canada-Ontario.
Description: SSHRC Fall Forum: Imagining Canada's Future – How can emerging technologies be leveraged to benefit Canadians, Ottawa, November 2016.
- Aten, K. & Nardon, L. (2016). *Intercultural competence in the digital age*. Academy of International Business Southeast Chapter, Tampa, Florida.
- Nardon, L. (2016). *Developing intercultural competence through reflection*. Academy of International Business Southeast Chapter, Tampa, Florida.
- Nardon, L. & Aten, K. (2015). *Method or Madness: Qualitative Research on Cognition, Culture and Information Systems*. Association for Information

Systems Journal Club Webinars, Webinar, Virtual.

Description: Paper 7, on February 2015. Available online to members at http://aisel.aisnet.org/journal_club/7/

Nardon, L. (2015). *Educating for a multicultural workplace*. International Academy of Intercultural Relations, Bergen, Norway.

Nardon, L., Aten, K., & Gulanowski, D. (2015). *Developing intercultural competence through reflection*. European Group for Organizational Studies (EGOS) Colloquium, Athens, Greece.

Aten, K., Nardon, L., & Stanko, T. (2014). *Working Out Loud: Adapting Communication to Support Distributed Collaboration*. Academy of Management (AOM), Philadelphia, Pennsylvania.

Description: August 2014

Aten, K. & Nardon, L. (2014). *Intangible Worlds, Tangible Cultures: the co-creation of culture and technology in a virtual world*. International Symposium on Process Organization Studies, Rhodes, Greece.

Nardon, L., Aten, L., & Gulanowski, D. (2014). *Blogging and Cultural Sensemaking*. Academy of Management (AOM), Philadelphia, Pennsylvania.

Description: Paper presented at the Cognition in the Rough Workshop, Academy of Management Conference, Philadelphia, August 2014.

Aten, K., Nardon, L., & Stanko, T. (2013). *Working out loud: Communication mechanisms for distributed collaboration*. Western Academy of Management Conference, Santa Fe, New Mexico.

Aten, K., Nardon, L., & Stanko, T. (2013). *Working out loud: Adapting behavior and technology to bridge distance and communication gaps in virtual collaboration*. European Group for Organizational Studies (EGOS) Colloquium, Montreal, Canada-Quebec.

Isabelle, D. & Nardon, L. (2013). *Bridging Cultural Distances: A cognitive perspective on migrant workers*. European Group for Organizational Studies (EGOS) Colloquium, Montreal, Canada-Quebec.

Nardon, L., Aten, K., & Gulanoski, D. (2013). *Bridging cultures through technology: the role of blogging in acculturation and cultural brokerage*. European Group for Organizational Studies (EGOS) Colloquium, Montreal, Canada-Quebec.

Stanko, T., Ritcher, J., Nardon, L., & Aten, K. (2011). *The plastic Prometheus: An exploration of individual work identity and routines in virtual worlds*. International Symposium on Process Organization Studies, Corfu, Greece.

Aten, K. & Nardon, L. (2010). *From Virtual Games to Real Life Tools: The Role of Culture in the Evolution of Virtual World Technology*. Academy of Management (AOM), Montreal, Canada-Quebec.

Other Presentations

Presentation

2021: Ottawa Community Immigrant Services Organization. Nardon, L. Working in a multicultural team, presented at OCISO, February 12th, 2021, May 7th 2021, June 15th 2021

2021: Ottawa Community Immigrant Services Organization. Nardon, L. Employment counseling of newcomers, presented at OCISO, March 31st, 2021

2021: Immigrant Women Services. Nardon, L. Working in a multicultural team, presented at Immigrant Women Services, March 2021

2019: Global Affairs Canada, Ottawa, Canada-Ontario. Working in a Multicultural World, presented at a Visible Minorities event at Global Affairs Canada, February 20 2019

2019: TD Mentorship. Intercultural Mentoring, presented at the TD Mentorship launch, September 26 2019

2019: Circle of Champions. Nardon, L. Supporting immigrant adjustment, presented at the Circle of Champions launch, October 29 2019.

2018: World Skills, Ottawa, Canada-Ontario. Increasing Productivity through Intercultural Competence presented at the Not for Profit Employment Engagement Program

2018: Hire Immigrants Ottawa, Ottawa, Canada-Ontario. Leveraging Diversity: Fostering a culture of belonging, presented at the Employer Learning Forum

2018: Canadian Association for Refugee and Forced Migration Studies, Ottawa, Canada-Ontario. Nardon, L. Zhang, H., Szkudlarek, B; Gulanowski, D. Employment support and refugee workforce integration

2017: Innovation, Science and Economic Development Canada, Innovation Lab, Ottawa, Canada-Ontario. Nardon, L., Grant, G., Wang, Y. Developing a culture of innovation in Canadian organizations, October 20 2017

2017: RBC Foundation Women in Management Speaker Series, N/A, Canada. "Working in a Multicultural World", Presented at the RBC Foundation Women in Management Speaker Series, October 18 2017.

Contract or Other Research

Research Grants and Awards

Grants

2025 [Year 5 of 5]: Nardon, L. Insight Grant (\$25,345.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 5 of 5]: Nardon, L. Innovation, Science and Economic Development Canada - Grant (\$205,700.00 Not Funded), Principal Investigator, Innovation, Science and Economic Development Canada. [Status: Not Funded]

2024 [Year 4 of 5]: Nardon, L. Insight Grant (\$25,345.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 3 of 3]: Nardon, L. Contract (\$76,400.00), Principal Investigator, Immigration, Refugees and Citizenship Canada. [Status: Funded]

2024 [Year 2 of 2]: Nardon, L. Partnership Engage Grant, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 4 of 5]: Nardon, L. Innovation, Science and Economic Development Canada - Grant (\$205,700.00 Not Funded), Principal Investigator, Innovation, Science and Economic Development Canada. [Status: Not Funded]

2023 [Year 3 of 5]: Nardon, L. Insight Grant (\$25,345.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 2]: Nardon, L. Partnership Engage Grant (\$0.00), Principal Investigator, World Skills Employment Center. [Status: Funded]

2023 [Year 3 of 3]: Nardon, L. IRRC Service Deliver Improvement Funding (\$90,000.00), Principal Investigator, World Skills Employment Centre. Enhancing labour market outcomes through sector-specific employer engagement. [Status: Funded]

2023 [Year 2 of 3]: Nardon, L. Contract (\$76,400.00), Principal Investigator, Immigration, Refugees and Citizenship Canada. [Status: Funded]

2023 [Year 1 of 2]: Nardon, L. Partnership Engage Grant, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 3 of 5]: Nardon, L. Innovation, Science and Economic Development Canada - Grant (\$205,700.00 Not Funded), Principal Investigator, Innovation, Science and Economic Development Canada. [Status: Not Funded]

2022 [Year 2 of 5]: Nardon, L. Insight Grant (\$25,345.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 2 of 2]: Nardon, L. Partnership Engage Grant (\$0.00), Principal Investigator, World Skills Employment Center. [Status: Funded]

2022 [Year 2 of 2]: Nardon, L. Partnership Engage Grant (\$12,477.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 2 of 3]: Nardon, L. IRRC Service Deliver Improvement Funding (\$90,000.00), Principal Investigator, World Skills Employment Centre. Enhancing labour market outcomes through sector-specific employer engagement. [Status: Funded]

2022 [Year 1 of 3]: Nardon, L. Contract (\$76,400.00), Principal Investigator, Immigration, Refugees and Citizenship Canada. [Status: Funded]

2021 [Year 2 of 5]: Nardon, L. Innovation, Science and Economic Development Canada - Grant (\$205,700.00 Not Funded), Principal Investigator, Innovation, Science and Economic Development Canada. [Status: Not Funded]

2021 [Year 1 of 5]: Nardon, L. Insight Grant (\$25,345.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 1 of 2]: Nardon, L. Partnership Engage Grant (\$0.00 of a total grant amount of \$2,875.00), Principal Investigator, World Skills Employment Center. [Status: Funded]

2021 [Year 1 of 2]: Nardon, L. Partnership Engage Grant (\$12,477.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 2 of 2]: Nardon, L. & Bujaki, M., Partnership Engage Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). co-applicant. [Status: Funded]

2021 [Year 2 of 2]: Nardon, L. Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). co-applicant. [Status: Funded]

2021 [Year 1 of 3]: Nardon, L. IRRC Service Deliver Improvement Funding (\$90,000.00), Principal Investigator, World Skills Employment Centre. Enhancing labour market outcomes through sector-specific employer engagement. [Status: Funded]

2020 [Year 1 of 4]: Nardon, L. Innovation, Science and Economic Development Canada - Grant (\$205,700.00 Not Funded), Principal Investigator, Innovation, Science and Economic Development Canada. [Status: Not Funded]

2020: Nardon, L. National Geographic Society - Grant (\$29,240.00 Not Funded), Principal Investigator, National Geographic Society. [Status: Not Funded]

2020: Hine, M. & Nardon, L., CU COVID-19 Rapid Research Response Grants, Co-Investigator, PRI-Carleton University. Co-applicant. [Status: Funded]

2020: Hine, M. & Nardon, L., CU COVID-19 Rapid Research Response Grants, Co-Investigator, PRI-Carleton University. Co-applicant. [Status: Funded]

2020: Schweitzer, L., Angela, D., Firoozi, M., & Nardon, L., Multidisciplinary Research Catalyst Fund, Collaborator, Carleton University, Vice-President (Research and International). [Status: Funded]

2020 [Year 1 of 2]: Nardon, L. & Bujaki, M., Partnership Engage Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). co-applicant. [Status: Funded]

2020 [Year 1 of 2]: Nardon, L. Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). co-applicant. [Status: Funded]

2019: Nardon, L. Public Sector Network Alliance Partnership - MOU, Collaborator, Public Sector Network Alliance Partnership. [Status: Funded]

2019: Nardon, L. Partnership Engage Grant (\$25,000.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019: Nardon, L. Partnership Engage Grant (\$5,125.00), Principal Investigator, Hire Immigrants Ottawa. [Status: Funded]

2019: Nardon, L. Research Achievement Award, Grantee, Carleton University, Vice-President (Research and International). [Status: Not Funded]

2019: Nardon, L. Development Grant - Explore (\$10,000.00 Not Funded), Principal Investigator, Carleton University, CORIS. [Status: Not Funded]

2019: Nardon, L. Partnership Engage Grant (\$28,478.00), Principal Investigator, Carleton University - Centre for Research & Education on Women and Work (CREWW). [Status: Funded]

2019: Nardon, L. ISED - WES Ecosystem Fund - Funding Agreement, Principal Investigator, Carleton University, Vice-President (Research and International). Funding agreement. [Status: Funded]

2019: Nardon, L. Multidisciplinary Research Catalyst Fund, Collaborator, PRI-Carleton University. [Status: Funded]

2018 [Year 3 of 3]: Nardon, L. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 2 of 2]: Nardon, L. Insight Development Grant (\$34,267.00 of a total grant amount of \$68,533.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2017 [Year 2 of 3]: Nardon, L. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2017 [Year 1 of 2]: Nardon, L. Insight Development Grant (\$34,267.00 of a total grant amount of \$68,533.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2017: Nardon, L. & Hine, M., Targeted Research (\$29,964.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016 [Year 1 of 3]: Nardon, L. Insight Grant (\$64,282.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016: Nardon, L. Knowledge Synthesis Grant (\$24,840.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016: Nardon, L. Knowledge Synthesis Grant (\$24,764.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2016: Nardon, L. Development Grant (\$9,800.00 Not Funded), Principal Investigator, Carleton University, CORIS. [Status: Not Funded]

2016 [Year 1 of 2]: Nardon, L. & Arya, A., Insight Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016: Grant, G. & Nardon, L., Insight Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2014: Nardon, L. Development Grant (\$6,000.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Panelist

2014: Administrative Sciences Association of Canada (ASAC), Muskoka, Canada-Ontario.

Board Member: PRJ Editorial Review Board

2010 – 2021: Journal of World Business.

Member: Committee/Task Force

2018: Sprott School of Business, Carleton University, Ottawa, Canada-Ontario. Director, Centre for Research on Inclusion at Work

Other Professional Service Activities

2022 – 2023: World Skills. Clean Coaching

2019 – 2020: World Skills, Ottawa, Canada-Ontario. Intercultural Communication

Scholarly Work in Progress

Papers Under Review

Gulanowski, D. & Nardon, L. (2020). "Online discussion forums and newcomers' labor market integration," Initial submission to *International Migration*.

Lee, E., Szkudlarek, B., Nguyen, D., & Nardon, L. (2019). "Overcoming the canvas ceiling: an interdisciplinary literature review on refugee workforce integration," Initial submission to *International Journal of Management Reviews*.

Moffitt, U., Nardon, L., & Zhang, H. (2018). "Negotiating Identity and National Belonging in the Public Sphere: Narratives of High-Skilled Work," Initial submission to *International Journal of Intercultural Relations*.

Szkudlarek, B., Nardon, L., & Osland, J. (2018). "Beyond Expatriation to the Challenges of Refugee Workforce Integration," 1st revise and resubmit to *Academy of Management Perspectives*.

Hine, M., Gulanowski, D., & Nardon, L. (2018). "Emotional expression and access to social networks: a text analysis of newcomers' blogs.," Initial submission to *Journal of Global Mobility: The Home of Expatriate Management Research*.

Wang, Y., Nardon, L., & Grant, G. (2018). "Culture and Innovation: A Review of National and Organizational Dimensions," Initial submission to *Creativity and Innovation Management*.

Description: Submitted May 15, 2018,

Nardon, L., Grant, G., & Wang, Y. (2018). "Culture and technological innovation: a review of national and organizational dimensions," Initial submission to *Creativity and Innovation Management*.

Working Papers

Nardon, L., Szkudlarek, B., Gulanowski, D., & Zhang, H. (2018). "Social support and newcomers' work adjustment: a literature review and future research agenda," targeted for International Journal of Intercultural Relations.

Papadopoulos, N., Gulanowski, D., Plante, L., & Nardon, L. (2018). "Knowing, Feeling, Doing: Cognitive, Affective, and Conative Factors in Internationalization and Export Development," targeted for International Journal of Export Marketing.

Gulanowski, D. & Nardon, L. (2018). "The role of online discussion forums in newcomers' labour market integration in Canada.," targeted for Journal of World Business.

Nardon, L., Zhang, H., & Gulanowski, D. (2018). "Supporting refugee workforce integration: connecting the past, present and future," targeted for Organization Studies.

Nardon, L. (2018). "Making sense of migration: the role of work in migrant narratives."

Description: In preparation for journal submission.

Hine, M. & Nardon, L. (2018). "Emotional Expression in Newcomers' Blogs: A Text Analytics Perspective."

Description: In preparation for journal submission.

Lee, J., Szkudlarek, B., Nguyen, D., & Nardon, L. (2018). "Overcoming the canvas ceiling: an interdisciplinary literature review on refugee workforce integration."

Description: in preparation for journal submission

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2023/Fall	BUSI6705	Seminar in International Business II	0.5	6	Main	100%
2023/Fall	BUSI5982	Research Methodology	0.5	2	Main	100%
2023/Fall	BUSI5781	Seminar in International Business II	0.5	2	Main	100%
2023/Fall	BUSI6902	Research Methodology	0.5	12	Main	100%
2023/Summer	BUSI6901	Qualitative Research Design	0.5	8	Main	100%
2023/Winter	BUSI6903	Qualitative Research Design	0.39	7	Main	100%
2023/Winter	BUSI5983	Qualitative Research Design	0.11	2	Main	100%
2022/Fall	BUSI6902	Research Methodology	0.5	9	Main	100%
2022/Winter	BUSI6903	Qualitative Research Design	0.31	5	Main	62%
2022/Winter	BUSI5983	Qualitative Research Design	0.19	3	Main	38%
2021/Fall	BUSI6709	Special Topics in International Business	0.5	4	Main	100%
2021/Summer	BUSI6705	Seminar in International Business II	0.28	5	Main	56%
2021/Summer	BUSI5781	Seminar in International Business II	0.22	4	Main	44%
2020/Winter	BUSI6903	Qualitative Research Design	0.38	7	Main	77%
2020/Winter	BUSI5983	Qualitative Research Design	0.12	2	Main	23%
2019/Fall	BUSI6705	Seminar in International Business II	0.37	3	Main	75%

2019/Fall	BUSI5781	Seminar in International Business II	0.13	1	Main	25%
2019/Summer	BUSI6901	Qualitative Research Design	0.5	8	Main	100%
2019/Winter	BUSI6903	Qualitative Research Design	0.5	6	Main	100%
2018/Fall	BUSI2702	Intro International Management	0.5	47	Main	100%
2017/Fall	IBUS5716	Management of International Business	0.25	6	Main	100%
2017/Fall	BUSI2702	Intro International Management	0.5	28	Main	100%
2017/Fall	BUSI2702	Intro International Management	0.5	28	Main	100%
2017/Summer	BUSI6901	Qualitative Research Design	0.5	6	Main	100%
2017/Summer	IBUS5721	Regional & Global Business Strategy	0.25	10	Bogota	100%
2017/Winter	BUSI4719	Practicum in International Business	0.5	2	Main	100%
2017/Winter	BUSI2702	Intro International Management	0.5	33	Main	100%
2016/Fall	BUSI4719	Practicum in International Business	0.5	7	Main	100%
2016/Fall	IBUS5716	Management of International Business	0.25	14	Main	100%
2016/Summer	BUSI4719	Practicum in International Business	0.5	2	Main	100%
2016/Winter	IBUS5716	Management of International Business	0.25	28	Shanghai	100%
2016/Winter	BUSI6705	Seminar in International Business II	0.5	7	Main	100%
2016/Winter	BUSI4719	Practicum in International Business	0.5	2	Main	100%
2015/Fall	BUSI4719	Practicum in International Business	0.5	4	Main	100%
2015/Fall	IBUS5721	Regional & Global Business Strategy	0.25	23	Bogota	100%
2015/Fall	IBUS5721	Regional & Global Business Strategy	0.25	14	Main	100%
2015/Fall	IBUS5716	Management of International Business	0.25	25	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2020-2021: Magdalene Cooman

PhD. Comprehensive Committees:

2023-2024: Hadis Mohammadzadeh

2023-2024: Thumesha Jayatilake

2023-2024: Paul Hope

PhD. Thesis Committees:

2023-2024: Mariam Mohamed Ahmed Magdy Hussein

Innovation in Teaching Methods

Innovations in Course Content / Presentation

2016 - Reformulated the delivery of BUSI 2702 for active learning classroom.

2010 - Reformulated the delivery of BUSI 2702 to include tutorials to deal with student stress and hand-on management activity.

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Selected Media Appearances: Online

2021 - How to cope with pandemic fatigue by imagining metaphors

Credentials

Research Reports

2016: Nardon, L., Grant, G., & Wang, Y., Socio Cognitive Influences on Innovation., submitted to Social Sciences and Humanities Research Council of Canada.

Service to the Community**Member of a Committee**

2020 – 2023: OMS Montessori School, Management Board Member

2017 – 2018: Non Profit Employer Engagement Project, World Skills

Other Community Service Activities

2020: Coach/mentor for newcomers

2019: Workshop Intercultural Communication, World Skills, Empowering Newcomer Women

Speech / Presentation at a Community Meeting

2011: RecrearMagnify, International Young Leaders Conference, "Seeking common ground: cross-cultural communication", RecrearMagnify, International Young Leaders Conference, invited speaker, August 2011.

Curriculum Vitae - Sprott School of Business

Leighann Neilson, PhD
Associate Professor - Tenured, 2010
Sprott School of Business (Marketing)
Telephone: 520-2600 x8511
Email: leighann.neilson@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-9947-9899>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Queen's University.
Title: *Wrestling with Morality: Moral Reasoning in Marketplace Cultures*
Master of Arts. Queen's University.
Title: *Museum Visiting in Canada: A Means to Furthering Cultural Goals?*
Bachelor of Arts. Carleton University.
Title: *A Community in Cyberspace: carleton.general*

Professional Certifications

Business Administration Diploma - Accounting, 1982, Algonquin College of Applied Arts and Technology, Ottawa, Ontario.
Business Administration Diploma-Management, 1982, Algonquin College of Applied Arts and Technology, Ottawa, Ontario.

B. EMPLOYMENT

Academic Appointments

Academic Director, Graduate Research Programs, Sprott School of Business, Carleton University (July, 2021 - Present), Ottawa, Canada-Ontario.
Associate Professor, Sprott School of Business, Carleton University (July, 2011 - Present), Ottawa, Canada-Ontario.
Assistant Professor, Sprott School of Business, Carleton University (July, 2006 - June, 2011), Ottawa, Canada-Ontario. Tenure awarded December 2009.
Lecturer, University of Guelph, Department of Marketing and Consumer Studies (November, 2004 - June, 2006), Guelph, Canada-Ontario. Tenure stream appointment.

Other Employment

Research Assistant, Queen's University, School of Business (May, 2003 - August, 2003), Kingston, Canada-Ontario.
Research Assistant, Queen's University, School of Business (November, 2000 - September, 2001), Kingston, Canada-Ontario.
Research Assistant, University of Western Ontario, Richard Ivey School of Business (November, 2000 - September, 2001), London, Canada-Ontario.
Teaching Assistant, Basic Statistics in Social Research, Queen's University, Department of Sociology (January, 2000 - May, 2000), Kingston, Canada-Ontario.
Teaching Assistant, Sociology of Art and Culture, Queen's University, Department of Sociology (September, 1999 - May, 2000), Kingston, Canada-Ontario.
Teaching Assistant, Introduction to Sociology, Queen's University, Department of Sociology (September, 1998 - May, 1999), Kingston, Canada-Ontario.
Employment Counsellor, Placement & Career Services, Carleton University (December, 1992 - June, 1998), Ottawa, Canada-Ontario.
Employment Counsellor/ Employment Market Advisor, Employment & Immigration Canada (February, 1983 - December, 1992), Ottawa, Canada-Ontario.
Ottawa West, Pembroke, and Perth Canada Employment Centres.

C. PROFESSIONAL HONOURS

2022: Scholarship of Teaching and Learning (SoTL) Award, Teaching and Learning Services, Carleton University.
2022: Honourable Mention for Best Paper Award, Administrative Sciences Association of Canada (ASAC) Conference. Gender & Diversity in Organizations Division (with Wendy Carroll, Tasnuva Chaudhury & Rosemary McGowan).
2021: Best Paper Award, Association for Marketing Theory and Practice Conference.
2021: Outstand Reviewer Award, Journal of Historical Research in Marketing.
2019: Outstanding Reviewer of the Year, Journal for Advancement of Marketing Education.
2017: Teaching Achievement Award, Carleton University. (\$15,000).
2017: Outstanding Reviewer, 45th Annual Conference of the Administrative Sciences Association of Canada, Business History Division.

2013: Outstanding Reviewer, Journal for Advancement of Marketing Education.

2012: Outstanding Reviewer, Journal of Historical Research in Marketing.

2012: Best Paper Award, Hospitality, Tourism, Recreation and Sport Management Division, ASAC Conference.

2011: Stanley Hollander Best Paper Award, CHARM Conference.

2011: Capital Educators' [Teaching] Award Winner, Capital Educators.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		6		6
Articles-in-Progress (All)		14		14
Publications in Conference Proceedings (Refereed)		7		7
Publications of Non-refereed or Invited Papers		1		1
Paper Presentations (Refereed)		5		5
Grants - Funded (both refereed and non-refereed)		4		4
Other Research, Non-refereed		1		1
Totals		38		38

Refereed Scholarly Publications

Articles in Refereed Journals

- Tartila Banu, N., Darmody, A., & Neilson, L. (2024). RESCUER: Combining Passive and Active Learning Techniques to Teach Food Sustainability. *Journal of Marketing Education*, 42 (2). [B]
- Wang, Y., Neilson, L., & Ji, S. (2023). Mindfulness Through Agency in Health Consumption: Empirical Evidence from Committed Dietary Supplement Consumers. *Journal of Consumer Affairs*, 57 (2), 871-905. [A]
- Wang, Y., Neilson, L., & Ji, S. (2023). Why and How Do Consumer Use Dietary Supplements? A Systematic Review and Thematic Analysis. *Health Promotion International*, 38 (1), daac197. [A]
- Neilson, L. (2022). Accessing Primary Source for Marketing and Advertising History Research from Family History Websi. *Journal of Historical Research in Marketing*, 14 (2), 281-291. [B]
- Elnahla, N., & Neilson, L. (2021). Retailance: A conceptual framework and review of surveillance in retail. *International Review of Retail, Distribution and Consumer Research*, 31 (3), 330-357. [B]
Published with DOI and volume assigned
- Bujaki, M., Durocher, S., Brouard, F., & Neilson, L. (2021). Conflicting accounts of inclusiveness in accounting firm recruitment website photographs. *European Accounting Review*, 30 (3), 473-501. [A+]
Published online: 14 Jul 2020 (online advance pub)
- Neilson, L., & Barkel, E. (2020). The Gift that Starts a Home': Marketing of the hope chest in the United States. *Journal of Historical Research in Marketing*, 12 (4), 473-502. [B]
- Bujaki, M. L., Durocher, S., Brouard, F., Neilson, L., & Pyper, R. (2018). Protect, profit, profess, promote: Establishing legitimacy through logics of 'diversity' in Canadian accounting firm recruitment documents. *Canadian Journal of Administrative Sciences*, 35 (1), 162-178. [B]
Published online: 20 April 2016 (Online Version of Record published before inclusion in an issue)
- Brouard, F., Bujaki, M. L., Durocher, S., & Neilson, L. (2017). Professional Accountants' Identity Formation: An Integrative Framework. *Journal of Business Ethics*, 142 (2), 225-238. [A,FT50]
Online April 2016
- Neilson, L. C., & Madill, J. (2014). Using Winery Websites to Attract Wine Tourists: An International Comparison. *International Journal of Wine Business Research*, 26 (1), 2-26. [B]
- Mittelman, R., & Neilson, L. C. (2011). Development Porn? Child Sponsorship Advertisements in the 1970s. *Journal of Historical Research in Marketing*, 3 (3), 370-401. [B]
- Neilson, L. C., Madill, J., & Haines, George, Jr. (2010). The Development of E-business in Wine Industry SMEs: An International Perspective. *International Journal of Electronic Business*, 8 (2), 126-147. [C]
- Madill, J., & Neilson, L. C. (2010). Web Site Utilization in SME Business Strategy: The Case of Canadian Wine SMEs. *Journal of Small Business and Entrepreneurship*, 23 (4), 489-508. [C]

Articles in Refereed Conference Proceedings

Full Paper

- Neilson, L., & Elnahla, N. (2022). Getting Something for Nothing: A history of retail loyalty programs in North America. *Atlantic Schools of Business Conference*.
- Carroll, W., Chaudhury, T., McGowan, R. A., & Neilson, L. (2022). A Preliminary Analysis of Roles, Funding, and Big Five Personality Characteristics of Protagonists in Social Enterprise Cases: A Content Analysis of Business School Cases. *Administrative Sciences Association of Canada*, 23, 35-61.
- Elnahla, N., & Neilson, L. (2021). The stressors faced by retail workers during the COVID-19 pandemic. *Association for Marketing Theory and Practice Conference*
- Elnahla, Nada and Leighann C. Neilson, "The stressors faced by retail workers during the COVID-19 pandemic," in Association for Marketing Theory and Practice (AMTP) Conference Proceedings, March 18-20
- Neilson, L., Banu, N., & Vanderby, K. (2021). Food for Thought: Teaching Food Sustainability through a Macromarketing Lens. *Annual Macromarketing Conference*.
- Neilson, Leighann C., Narmin Banu and Katie Vanderby, "Food for Thought: Teaching Food Sustainability through a Macromarketing Lens," in Proceedings of the 46th Annual Macromarketing Conference: Macromarketing Putting the Local into Global, July 12-17, ed. Ben Wooliscroft, Francisco Conejo, Alexandra Ganglmair-Wooliscroft and Anthony Samuel, Auckland, NZ: Macromarketing Society, 259-277.
- Neilson, L. (2021). Accessing Primary Sources for Marketing and Advertising History Research with Ancestry.com. *Biennial Conference on Historical Analysis and Research in Marketing*.
- Neilson, Leighann C., "Accessing Primary Sources for Marketing and Advertising History Research with Ancestry.com," in Marketing and Social Change: Making History and Culture, Proceedings of the 20th Biennial Conference on Historical Analysis and Research in Marketing, June 4-6, ed. Joanne McNeish, Ottawa, ON: CHARM Association, 45-49
- Wang, Y., & Neilson, L. (2019). How and Why Do They Use Dietary Supplements? A Literature Review of Dietary Supplements Consumption. In ed. Laura Syms (Ed.) *Annual Atlantic Schools of Business Conference*, Sydney, NS: Atlantic Schools of Business, 77-97.
- Neilson, L., & Barkel, E. (2019). The Gift that Starts the Home: Marketing of the hope chest in North America. *Conference on Historical Analysis and Research in Marketing*.
- Ramirez, A., & Neilson, L. (2018). How are we confronting Drucker's Management Challenges for the 21st Century? An investigation on the state of the Information Revolution. *Administrative Sciences Association of Canada (ASAC)*.
- Administrative Sciences Association of Canada's Annual Meeting – Business History Division, Toronto, Ontario
- Neilson, L. (2017). Making and Marketing a Canadian Art Icon: Tom Thomson. In Ann-Marie Kennedy (Ed.) *Conference on Historical Analysis and Research in Marketing (CHARM)*, Liverpool, UK: Conference on Historical Analysis and Research in Marketing Association, 131-140.
- In Explorations in Globalization and Glocalization: Marketing History Through the Ages, Proceedings of the 18th Conference on Historical Analysis and Research in Marketing (CHARM), June 1 to 4.
- Leighann, N., McShane, L., & Stuewe, D. (2016). Community Service Learning: the Community Partner Perspective. *Atlantic Schools of Business Conference*.
- St. Mary's University, Halifax.
- Bujaki, M., Durocher, S., Brouard, F., Neilson, L., & Pyper, R. (2015). The Diversity of 'Diversity' in Canadian Accounting Firm Recruitment Websites. *Canadian Academic Accounting Association Annual Conference*, 1 (2).
- May 29, 2015. Toronto, ON. Vol. 1, No. 2. Available online through Social Science Research Network
- Neilson, L., & McQuarrie, F. A. (2013). Public, but not too public: political campaigns, media, and relationship marketing. *Media in Transition International Conference*.
- May 3-5, 2013. Massachusetts Institute of Technology, Boston. Full paper available online at: http://web.mit.edu/comm-forum/mit8/papers/Mcquarrie_Neilson.pdf.
- Ramirez, A., & Neilson, L. (2012). From Bush to Berners-Lee: Following the Trail of Pioneers in Search of the Universal Library. *Administrative Sciences Association of Canada (ASAC)*.
- Saint John's, Newfoundland.
- Neilson, L., & Madill, J. (2012). Using Internet-based and Web 2.0 Technologies to Attract the Wine Tourist: An International Comparison. *Administrative Sciences Association of Canada (ASAC)*.
- June 9-12, 2012. St. John's, Newfoundland. Proceedings of the Hospitality, Tourism, Recreation and Sport Management Division.
- Neilson, L. (2011). John Murray Gibbon (1875-1952): the branding of a northern nation. In Leighann C. Neilson (Ed.) *Conference on Historical Analysis and Research in Marketing (CHARM)*, New York: CHARM Assoc., 127-144.
- May 19-22, 2011. In *Marketing History in the New World*.
- McQuarrie, F. A., & Neilson, L. (2011). The Unstable Platform: Can Social Media Mobilize Audiences and Consumers for Non-commercial Purposes? *Media in Transition International Conference*.
- May 13-15, 2011. Boston.
- Full paper available online at <http://web.mit.edu/commforum/mit7/papers/McQuarrieNeilsonMiTpaper.pdf>.
- Madill, J., & Neilson, L. (2010). Utilizing Web Sites to Provide Information and Build Relationships with Consumers. *Academy of Marketing Science*

(AMS) Annual Conference.

May 26-29, 2010. Portland, Oregon.

E-Marketing and the 'Connected' Consumer.

Neilson, L. (2010). The White Bronze Company of St. Thomas, Ontario. In Terri Rittenburg (Ed.) *Macromarketing Conference*, Laramie, Wyoming: The Macromarketing Society, Inc., 171-183.

June 9-12, 2010. Laramie, Wyoming.

Exploring the Frontiers of Macromarketing.

Abstract Only

Neilson, L., & Ramirez, A. (2017). Making and Marketing a Canadian Icon: Tom Thomson. *Administrative Sciences Association of Canada (ASAC). ASAC2017 – the Administrative Sciences Association of Canada's Annual Meeting – Business History Track*, Montreal, Quebec

Neilson, L. (2013). The St. Thomas White Bronze Company: A Diffusion of Innovations Perspective. In Leighann C. Neilson (Ed.) *Conference on Historical Analysis and Research in Marketing (CHARM)*, Copenhagen, Denmark: CHARM Assoc., 353-356.

May 30 to June 2, 2013. Varieties, Alternatives, and Deviations in Marketing History.

[extended abstract]

Madill, J., & Neilson, L. (2012). Market Turbulence and Electronic Approaches to Marketing in Wine Sector SMEs: a Structured Abstract. In L.

Robinson, Jr. (Ed.) *Academy of Marketing Science (AMS) Annual Conference*, 32, New Orleans:.

May 15-20, 2012. In Marketing Dynamism & Sustainability: Things Change, Things Stay the Same...

[extended abstract]

Chapters in Edited Books

Elnahla, N., & Neilson, L. (2022). MTurk: An Online Platform for Data Collection and Recruitment of Interview Informants in Mixed Methods Research. In Press, *SAGE Doing Research Online*. [Status: InPress]

Neilson, L. (2021). Learning How to Evaluate Archival Advertising Materials-Case Study. *Research Methods for Primary Sources*. [Status: E-Chapter]

Description: Research Methods Primary Sources is an online learning tool for primary source literacy that can be used in classroom-based and online teaching, as well as for independent study.

forthcoming, March 2022.

Neilson, L. (2021). Learning How to Evaluate Archival Advertising Materials. *Research Methods for Primary Sources*. [Status: E-Chapter]

Neilson, L. (2016). Promoting Canada's Cultural Mosaic: John Murray Gibbon and the Canadian Pacific Folk Music Festivals. In Leanne White (Ed.), *Commercial Nationalism* (pp. 264-280). UK: Channel View Publications. [Status: Published]

Description: Channel View Publications. Bristol, UK.

Neilson, L., & Delphin, A. M. (2016). Pre-Confederation Canadian Marketing History. In Brian D.G. Jones and Mark Tadajewski (Eds.), *Companion to Marketing History* (pp. 333-352). Routledge. [Status: Published]

Description: London, England.

Neilson, L., & Delphin, A. M. (2015). Great Granny Lives On: Pursuing Immortality through Family History Research. In Susan Dobscha (Ed.), *Death in a Consumer Culture* (pp. 170-183). London, England: Routledge. [Status: Published]

Neilson, L., & Mittelman, R. (2012). Ideological Outcomes of Marketing Practices: A Critical Historical Analysis of Child Sponsorship Programs. In Russell W. Belk, Soren Askegaard and Linda Scott (Eds.), *Research in Consumer Behavior, Vol. 14* (pp. 9-27). UK: Emerald Publishing. [Status: Published]

Description:

Other (Non-refereed) Scholarly Publications

Invited Articles/Review articles

Hawkins, R., & Neilson, L. (2022). Guest editorial: Introduction to the Special Issue on Archival Sources for Marketing and Advertising History Research. *Journal of Historical Research in Marketing*, 14 (2), 133-134.

Neilson, L. (2020). Why are Canadians researching their Family History? Results from the Canadian Genealogy Survey. *Canadian Issues*, 22-25.

Other Scholarly Publications

2024: Tartila Banu, N., Darmody, A., & Neilson, L.C., *How marketing classes can rescue 'ugly produce' from becoming food waste*.

2020: Elnahla, N., & Neilson, L., *Keep your distance... Retail workers insist that they too are human beings, The Conversation*.

2017: Neilson, L., *Research Fellow, Carleton Centre for Public History*.

2012: Neilson, L., *Review of Jones, D.G. Brian (2011) Pioneers of Marketing: A Collection of Biographical Essays*. Neilson, Leighann C. Review of Jones, D.G. Brian (2011) Pioneers of Marketing: A Collection of Biographical Essays for *Journal of Macromarketing*, 32 (2), 226-227.

2011: Neilson, L., & Shapiro, S.J., *Guest editorial, Journal of Historical Research in Marketing*. Neilson, Leighann C. and Stanley J. Shapiro, "Guest editorial," *Journal of Historical Research in Marketing*, 3 (3), 274-276.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Associate Editor

2022: Journal of Historical Research in Marketing (International).

Editor: Conference Proceedings

2013: Conference on Historical Analysis and Research in Marketing (CHARM), Copenhagen, Denmark (International). Proceedings of the 16th Conference on Historical Analysis and Research in Marketing (CHARM).

2011: Conference on Historical Analysis and Research in Marketing (CHARM), New York, New York (International). Proceedings of the 15th Conference on Historical Analysis and Research in Marketing (CHARM), New York, New York.

Editor: Special Issue of a PRJ

2022: Journal of Historical Research in Marketing (International).

2020 – 2021: Journal of Historical Research in Marketing (International). Special Issue of Journal of Historical Research in Marketing focusing on resources for historical Advertising and Marketing research. Expected publication date: 2021

2011: Journal of Historical Research in Marketing (International). Co-editor, with Dr. Stanley Shapiro, Special Canadian Issue of Journal of Historical Research in Marketing, 3 (3).

Presentations

Papers Presented at Conferences

Refereed

Elnahla, N. & Neilson, L. (2024). *Something for Everyone? The rise and fall of trading stamps in America*. CHORD, Virtual, Virtual.

Description: Chord Online Event

Elnahla, N. & Neilson, L. (2023). *Immigrants' nonvoluntary disposal regret*. British Academy of Marketing, Birmingham, England.

Neilson, L., Chaudhary, T., & Afrouzi, A. (2023). *A Preliminary Examination of the Experience of Graduate Students from Equity Seeking Groups*. Early Career Researcher Conference, CRIW, Virtual, Virtual.

Elnahla, N. & Neilson, L. (2021). *The Impact of COVID-19 on Brick-and-Mortar Retail Workers*. CRIW, Sprott School of Business, Ottawa, Canada-Ontario.

Neilson, L. & Barkel, E. (2019). *The Gift that Starts the Home': Marketing of the hope chest in North America*. Conference on Historical Analysis and Research in Marketing, Ottawa, Canada-Ontario.

Bujaki, M., Neilson, L., Durocher, A., & Brouard, F. (2019). *A content and semiotic analysis of the inclusiveness of Canadian accounting firm recruitment website photographs*. Alternative Accounts, Kingston, Canada-Ontario.

Description: May 11, 2019.

Neilson, L. & Ramirez, A. (2018, May). *How are we confronting Drucker's Management Challengers for the 21st Century? An investigation on the state of the Information Revolution*. Administrative Sciences Association of Canada, Toronto, Canada-Ontario.

Description: May 27 to 29, Ryerson University

Neilson, L. (2017). *John Murray Gibbon (1875-1952): Branding Canada as a Cultural Mosaic*. Association of Business Historians Annual Conference, Glasgow, Scotland.

Description: June 29 to July 1, University of Glasgow, Scotland.

Neilson, L. & Ramirez, A. (2017). *Making and Marketing a Canadian Icon: Tom Thomson*. Administrative Sciences Association of Canada (ASAC), Montreal, Canada-Quebec.

Description: Presented by Dr. Ramirez at the 45th Annual Conference of the Administrative Sciences Association of Canada, Business History Division, May 29 – June 1, Montreal, Quebec. [Abstract published in proceedings.]

Bujaki, M., Neilson, L., Durocher, S., & Brouard, F. (2016). *Photographic Depictions of Gender and Ethnic Diversity in Canadian Accounting Firm Recruitment Documents*. Tunisian Accounting and Finance Professors Association of North America, Monastir, Tunisia.

Description: Summer Accounting and Finance Conference, July 17 2016

Neilson, L. (2016). *Making and Marketing a Canadian Icon: Tom Thomson*. Economic and Business History Society Conference, Montreal, Canada-Quebec.

Mcshane, L. & Neilson, L. C. (2016). *Closing the Loop: Community Engaged Pedagogy in Business Courses*. Canadian Alliance for Community Service Learning, Calgary, Canada-Alberta.

Description: Presented via skype at CACSL Conference 2016: Impact for Sustainability, May 25-27, Mount Royal University, Calgary, Alberta, 2016.

Neilson, L., Mcshane, L., & Stuewe, D. (2016). *Community Service Learning: The Community Partner Perspective*. Atlantic Schools of Business Conference, Halifax, Canada-Nova Scotia.

Description: October 21-23.

- Brouard, F., Bujaki, M., Durocher, S., & Neilson, L. (2015). *A theoretical framework of professional accountant identity formation and directions for future research*. Biennial Symposium on Accounting Ethics - Accounting Professionalism, Toronto, Canada-Ontario.
Description: Also listed as: "Identity, Image and Stereotypes: Exploring Exchange Dynamics involving the Accounting Profession and Directions for Future Research", University of Waterloo, Toronto, April 16-18. Presented by Dr. Brouard.
- Brouard, F., Bujaki, M., Durocher, S., & Neilson, L. (2015). *A theoretical framework of professional accountant identity formation and directions for future research*. Telfer Annual Regional Conference on Accounting and Finance, Ottawa, Canada-Ontario.
Description: May 15
- Bujaki, M., Neilson, L., Durocher, S., & Brouard, F. (2015). *Photographic Depictions of Gender and Ethnic Diversity in Canadian Accounting Firm Recruitment Documents*. American Accounting Association (AAA) Annual Meeting, Chicago, Illinois.
Description: August 2015
- Bujaki, M., Durocher, S., Brouard, F., & Neilson, L. (2015). *Diversity of 'Diversity' in Canadian Accounting Firm Recruitment Websites*. Canadian Academic Accounting Association Annual Conference, Toronto, Canada-Ontario.
Description: May 28-31
- Bujaki, M., Neilson, L., Durocher, S., & Brouard, F. (2015). *The Diversity of 'Diversity' in Canadian Accounting Firm Recruitment Websites*. Alternative Accounts, Ottawa, Canada-Ontario.
Description: April 16-18
- Brouard, F., Bujaki, M., Durocher, S., & Neilson, L. (2015). *Identity, Image and Stereotypes: Exploring Exchange Dynamics involving the Accounting Profession and Directions for Future Research*. Telfer Annual Regional Conference on Accounting and Finance, Ottawa, Canada-Ontario.
Description: May 15 2015
- Bujaki, M., Brouard, F., Durocher, S., Neilson, L., & Pyper, R. (2014). *Depictions of Diversity in Canadian Accounting Firm Recruitment Documents: Gender and Race in Photos and Text*. International Conference on Diversity in Organizations, Communities, and Nations, Vienna, Austria.
Description: July 9-11
- Neilson, L. & Brouard, F. (2014). *Small Charities: An Analysis of Change in Fundraising Activities*. Sprott-Telfer Forum, Ottawa, Canada-Ontario.
Description: April 24, Ottawa. Co-presented with Dr. Brouard.
- Brouard, F. & Neilson, L. (2013). *Small Charities: An Analysis of Change in Fundraising Activities*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Victoria, Canada.
Description: June 5-7
- Neilson, L. & Del Mui, . (2013). *Genealogists and Heritage Consumption in Canada: Two Surveys and a Data Set*. National Council on Public History Conference, Ottawa, Canada-Ontario.
Description: April 17-20, 2013. Co-presented by both authors.
- Ramirez, A. & Neilson, L. (2013). *Are we there yet? Universal Libraries at the dawn of the third millennium*. Administrative Sciences Association of Canada (ASAC), Calgary, Canada-Alberta.
Description: June 8-11. Presented by Dr. Ramirez.
- Brouard, F. & Neilson, L. (2012). *Development of a Social Enterprises Database: Challenges in integrating T3010 data*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Waterloo, Canada.
Description: University of Waterloo, May 30 - June 1
- Neilson, L. (2012). *Caroline B. Hinman: Off the Beaten Track*. Interdisciplinary Mountain Studies Conference, Edmonton, Canada-Alberta.
Description: December 10-14, 2012
- Ramirez, A. & Neilson, L. (2012). *From Bush to Berners-Lee: Following the trail of pioneers in search of the Universal Library*. Administrative Sciences Association of Canada (ASAC), St. John's, Canada-Newfoundland.
Description: June 9-12. Presented by Dr. Ramirez (authors declined publication in proceedings)
- Muise, D. A. & Neilson, L. (2012). *Families and Region: Genealogy and the Search for Regional Roots*. Atlantic Canada Studies Conference, Saint John, Canada-New Brunswick.
Description: May 4-6, Saint John, NB. Presented by Dr. Neilson
- Brouard, F. & Neilson, L. (2011). *Development of a Social Enterprises Database: Issues and Challenges*. Association for Research in Nonprofit Organizations and Voluntary Action (ARNOVA), Toronto, Canada-Ontario.
Description: Presented by Dr. Brouard as part of panel on 'Intrepid Exploration: Capturing the nature and activities of social enterprises', November 17-19.
- Neilson, L. (2011). *John Murray Gibbon (1875-1952): Re-discovering a Nation Brander*. Sprott-Telfer Research Day, Ottawa, Canada-Ontario.
Description: April 21
- Neilson, L. (2010). *The St. Thomas White Bronze Company (1883-1890)*. Association for Gravestone Studies Conference, Granville, Ohio.
Description: June 22-27.

Other Presentations

Keynote Address

2010: Sprott PhD Symposium, Ottawa, Canada-Ontario. Invited Career Keynote Speaker

Presentation

2023: British Academy of Marketing. **Immigrants' nonvoluntary disposal regret**

2022: Early Career Researcher Conference, CRIW. Neilson, Leighann C., Wendy R. Carroll, Rosemary McGowan and Sabina Chowdhury, "What is the current state of evidence about EDI in organizations classified as social enterprises?" presented by Sabina Chowdhury at 2022 Early Career Researcher Conference, hosted by CRIW, May 10, online.

2020: North American Case Research Association Start-Up Cases Workshop. Elnahla, Nada and Leighann C. Neilson, "Surveillance in Retailing: Meeting Customer Needs," presented by Nada Elnahla at the NACRA 2020 Start-Up Cases Workshop, October 8-10, online.

2018: EDC Teaching Certificate series, Ottawa, Canada-Ontario. "Teaching in a Business School," invited presentation as part the Sprott-EDC Teaching Certificate series for Sprott Ph.D. students, March 16.

2018: CREWW Research Forum, Ottawa, Canada-Ontario. Neilson, Leighann C., Rosemary A. McGowan, Tasnuva Chaudhury, Colleen Sharen and Wendy R. Carroll, "Women and Entrepreneurship: The Role of Postsecondary Pedagogy in Shaping Identity, Values, and Aspirations," October 30, Carleton University.

2015: Carleton University Art Gallery (CUAG) Connects Series, Ottawa, Canada-Ontario. March 18.

2015: Centre for Research and Education on Women and Work (CREWW), Ottawa, Canada-Ontario. "Social Media Marketing" sponsored by the Centre for Research and Education on Women and Work (CREWW), Carleton University, November 24.

2014: Carleton University Spring Conference, Lansdowne, Canada-Ontario. "Why Study Genealogists? Initial Results from the Canadian Genealogy Survey", May 2-4, Lansdowne, ON.

2014: Landscape, Nature and Memory: Tourism History in Canada Workshop, Vancouver, Canada-British Columbia. "Caroline Borden Hinman: Off the Beaten Track, 1917-1959", October 16-18.

2013: British Isles Family History Society of Greater Ottawa, Ottawa, Canada-Ontario. "By the Skin of My Teeth": Great Moments in Genealogy session presented to the British Isles Family History Society of Greater Ottawa, December 14

2012: British Isles Family History Society of Greater Ottawa (BIGHGO), Ottawa, Canada-Ontario. Del Muike, "Why Study Genealogists? Initial Results from the Canadian Genealogy Survey." September 22. Presented by Dr. Neilson.

2012: Ontario Genealogical Society, Ottawa Branch, Ottawa, Canada-Ontario. "Initial Results from the Canadian Genealogy Survey", October 20. Presented by Dr. Neilson.

2011: Market Research Intelligence Association, Ottawa, Canada-Ontario. Madill, Judith, Leighann Neilson and George H. Haines, Jr., "E-Business in Wine Industry SMEs: Research based on the Web and Social Media." Presented to the Market Research Intelligence Association, Ottawa Branch, April 28. Presented by all three authors.

2011: National History Forum: Speaking of the Past: History Beyond the Classroom, Ottawa, Canada-Ontario. "Learning from Family History." December 11, Ottawa, ON.

Contract or Other Research

Research Grants and Awards

Grants

2021: Neilson, L. Development Grants - SSHRC Explore (\$9,417.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021: Neilson, L., Chowdhury, S., Carroll, W., & McGowan, R., CRIW Ignite! Special Funding for Literature Reviews Grant (\$9,000.00), Co-Principal Investigator, PRI-Carleton University. CRIW Ignite! Special Funding for Literature Reviews Grant to support, "Do social enterprises achieve higher equity, diversity, and inclusion goals? A scoping review of the empirical evidence," Lead investigator with MSc student Sabina Chowdhury, Dr. Wendy Carroll and Dr. Rosemary McGowan (\$9,000). [Status: Funded]

2020: Neilson, L. Exchange (\$7,000.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020: Neilson, L. & Elnahla, N., CRIW Ignite! COVID-19 Special Funding Research Grant (\$5,000.00), Co-Principal Investigator, PRI-Carleton University. CRIW Ignite! COVID-19 Special Funding Research Grant to support research on "The Impact of COVID-19 on Brick-and-Mortar Retail Workers. Nada Elnahla, PhD Candidate, lead investigator (\$5,000). [Status: Funded]

2018: Neilson, L. Development Grant (\$10,000.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2016 [Year 1 of 3]: Neilson, L. & Marshall, D., Partnership Development Grant, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2014 [Year 2 of 2]: Neilson, L. SSHRC SIG Sub-Grant (\$3,500.00 of a total grant amount of \$7,000.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2013 [Year 1 of 2]: Neilson, L. SSHRC SIG Sub-Grant (\$3,500.00 of a total grant amount of \$7,000.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board Member: PRJ Editorial Review Board

2017: Journal for Advancement of Marketing Education.

2017: Journal of Historical Research in Marketing.

Board of Directors: Moderate Involvement

2011 – 2013: Conference on Historical Analysis and Research in Marketing (CHARM). Secretary

Board of Directors: Substantial Involvement

2013 – 2017: Conference on Historical Analysis and Research in Marketing (CHARM). Vice-President

Chair: Committee / Task Force

2017 – 2023: Conference on Historical Analysis and Research in Marketing (CHARM). Local Arrangements Chair

Chair: Conference / Track / Program

2017: Conference on Historical Analysis and Research in Marketing (CHARM), Liverpool, United Kingdom. Session Chair

2016: Economic and Business History Society Conference, Montreal, Canada-Quebec. Session Chair

2011 – 2013: Conference on Historical Analysis and Research in Marketing (CHARM), Copenhagen, Denmark. Program Chair, 16th Conference on Historical Analysis and Research in Marketing

2011: Conference on Historical Analysis and Research in Marketing (CHARM), New York, New York. Session Chair

Keynote Address

2010: Sprott PhD Symposium, Ottawa, Canada-Ontario. Invited Career Keynote Speaker

Other Professional Service Activities

2020: Centre for Research on Inclusion at Work. Adjudicator, Ignite! grants,

Reviewer - External Tenure

2017: Athabasca University. External Referee, Application for Promotion to Associate Professor.

2017: Saint Mary's University, Halifax, Canada-Nova Scotia. External Reviewer, Tenure & Promotion Application

Reviewer: Ad Hoc Reviewer for a Journal

2022 – 2024: Journal of Historical Research in Marketing.

2023: Marketing Theory.

2023: Journal of Marketing Management.

2022: Journal of Macromarketing.

2022: Economic Anthropology.

2022: Canadian Journal of Administrative Sciences.

2021 – 2022: Journal of Historical Research in Marketing.

2021: Journal of Consumer Marketing.

2021: Arts and the Market.

2012 – 2021: Journal of Historical Research in Marketing.

2018 – 2020: Journal for Advancement of Marketing Education.

2019: Journal of Marketing Management.

2015: Marketing Education Review.

2015: Information & Management.

2014: Journal of Marketing Management.

2013 – 2014: Journal of Small Business and Entrepreneurship.

2012: Journal of Organizational Computing and Electronic Commerce.

2011: Journal of Macromarketing.

2011: Marketing Theory.

2011: Journal of Information Science & Technology.

2011: Information Technology & People.

2011: Journal of Global Information Management.

2010 – 2011: Marketing Education Review.

2010 – 2011: Consumption, Markets & Culture.

2010: MIS Quarterly International Journal of Arts Management.

2010: Journal of Marketing Management.

Reviewer: Book / Textbook

2019: Macmillan Higher Education. Marketing: Based on First Principles

2014: Louis E. Boone, David L. Kurtz, H. F. MacKenzie and Kim Snow, Contemporary Marketing, 4th Canadian edition. Reviewed for Nelson Education.

2014: William M. Pride and O.C. Ferrell, Marketing. Reviewed for Nelson Education, proposed Canadian Edition

2012: Philip Kotler, Gary Armstrong, Peggy Cunningham and Valerie Trifts, Principles of Marketing, 9th Canadian Ed.. Reviewed for Pearson Canada.

2012: Charles W. Lamb, Jr., Joseph F. Hair, Jr., Carl McDaniel, A.J. Faria and William Wellington, Marketing, 5th Canadian edition. Reviewed for Nelson Canada prior to revision for 6th edition.

2012: Stacy Landreth Grau, Marketing for Nonprofit Organizations: Insights and Innovation. Reviewed manuscript for Lyceum Books.

2010: Russell W. Belk, Eileen Fischer and Robert V. Kozinets, Qualitative Consumer and Marketing Research. Reviewed proposal for SAGE

2010: Jane Mills and Melanie Birks, Qualitative Research: Matching Question with Design. Reviewed proposal for SAGE.

Reviewer: Conference Paper

2021: Conference on Historical Analysis and Research in Marketing.

2019: Conference on Historical Analysis and Research in Marketing (CHARM).

2018: Administrative Sciences Association of Canada. Business History stream

2017: Conference on Historical Analysis and Research in Marketing (CHARM).

2017: Administrative Sciences Association of Canada (ASAC). Business History stream

2015: Conference on Historical Analysis and Research in Marketing (CHARM).

2015: Hawaii International Conference on System Sciences (HICSS).

2012: Administrative Sciences Association of Canada (ASAC).

2012: Hawaii International Conference on System Sciences (HICSS).

2011: Conference on Historical Analysis and Research in Marketing (CHARM).

2011: Administrative Sciences Association of Canada (ASAC). Information Systems stream

2010: Sprott PhD Symposium.

Scholarly Work in Progress

Papers Under Review

Elnahla, N. & Neilson, L. (2020). "Retailance? A conceptual framework and review of surveillance in retail," Revision under 2nd review.

Description: International Review of Retail, Distribution and Consumer Research

Neilson, L. & Elnahla, N. (2020). "Learning by Doing: Creating Video in the Marketing Classroom," Initial submission.

Elnahla, N. & Neilson, L. (2020). "The history of retail loyalty programs: how customer loyalty turned into a privacy issue," Initial submission to *Journal of Historical Research in Marketing*.

Elnahla, N. & Neilson, L. (2020). "The stressors faced by retail workers during the COVID-19 pandemic," Initial submission.

Neilson, L. (2020). "Through the Canadian Rockies," Initial submission.

Bujaki, M., Durocher, S., Brouard, F., & Neilson, L. (2019). "Conflicting accounts of inclusiveness in accounting firm recruitment website photographs," Revised and resubmitted to *European Accounting Review*.

Description: (previously submitted to Accounting, Auditing & Accountability Journal (A) «Depictions of Diversity in Canadian Accounting Firm Recruitment Documents» in March 2015; comments received and offer by editor to revise and resubmit - round 1); resubmitted in June 2016; comments received and offer by editor to revise and resubmit - round 2; resubmitted in May 2018; rejected in October 2018)

Working Papers

Elnahla, N. & Neilson, L. (2023). "A review of surveillance studies applicable to brick-and-mortar retail consumers," targeted for Journal of Marketing Management.

Wang, Y., Neilson, L., & Ji, S. (2022). "Localization of Dietary Supplement Consumption in China: The Power of Social Structure, Culture, and History," targeted for Consumption Markets and Culture.

Elnahla, N. & Neilson, L. (2022). "Business in the time of crisis: ALDO, the COVID-19 pandemic, and supply chain disruptions," targeted for The Case Journal.

Wang, Y., Neilson, L., & Ji, S. (2022). "The Power of Social Structure, Culture, and History and Its Implications on Consumer Behaviour: The Case of

Dietary Supplement Consumption," targeted for International Journal of Consumer Studies.

Banu, N., Neilson, L., Vanderby, K., & Darmody, A. (2022). "Food Consumption and Sustainability."

Elnahla, N., Neilson, L., & Darmody, A. (2022). "Frontline retail workers in a pandemic driven VUCA environment: A qualitative investigation in North America."

Elnahla, N. & Neilson, L. (2021). "Frontline Retail Workers' Response to Increased Retailance During the Covid-19 Pandemic."

Neilson, L. (2019). "Why Are Canadians Researching Their Family History? Results from the Canadian Genealogy Survey," targeted for Canadian Issues/Themes Canadiens.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI6908	PhD Comprehensives	0	11	Main	100%
2024/Winter	BUSI6907	PhD Thesis Tutorial	0.5	39	Main	100%
2024/Winter	BUSI6903	Qualitative Research Design	0.5	4	Main	100%
2024/Winter	BUSI6900	Directed Readings	0.5	2	Main	100%
2024/Winter	BUSI5989	M.Sc. Thesis	0	3	Main	100%
2024/Winter	BUSI5983	Qualitative Research Design	0.5	2	Main	100%
2024/Winter	BUSI6909	PhD Thesis	0	10	Main	100%
2023/Fall	BUSI6910	Foundations of Management Theory and Research	0.5	6	Main	100%
2023/Fall	BUSI5980	Foundations of Management Theory	0.5	2	Main	100%
2023/Fall	BUSI5980	Foundations of Management Theory	0.5	1	Main	100%
2023/Fall	BUSI5989	M.Sc. Thesis	0	3	Main	100%
2023/Fall	BUSI6907	PhD Thesis Tutorial	0.5	39	Main	100%
2023/Fall	BUSI6909	PhD Thesis	0	11	Main	100%
2023/Fall	BUSI6910	Foundations of Management Theory and Research	0.5	11	Main	100%
2023/Fall	BUSI6908	PhD Comprehensives	0	13	Main	100%
2023/Summer	BUSI6900	Directed Readings	0.5	1	Main	100%
2023/Summer	BUSI6909	PhD Thesis	0	10	Main	100%
2023/Summer	BUSI5989	M.Sc. Thesis	0	5	Main	100%
2023/Summer	BUSI6908	PhD Comprehensives	0	18	Main	100%
2023/Summer	BUSI6907	PhD Thesis Tutorial	0.5	32	Main	100%
2023/Winter	BUSI6909	PhD Thesis	0.6	7	Main	100%
2023/Winter	BUSI6908	PhD Comprehensives	0.6	4	Main	100%
2023/Winter	BUSI6907	PhD Thesis Tutorial	0.5	12	Main	100%
2023/Winter	BUSI6900	Directed Readings	0.5	3	Main	100%
2023/Winter	BUSI6200	Seminar in Marketing I	0.25	3	Main	50%
2023/Winter	BUSI5989	M.Sc. Thesis	0.6	2	Main	100%
2023/Winter	BUSI5280	Seminar in Marketing I: Management and Strategy	0.25	2	Main	50%
2022/Fall	BUSI6909	PhD Thesis	0.6	11	Main	100%
2022/Fall	BUSI5982	Research Methodology	0.5	3	Main	100%
2022/Fall	BUSI6900	Directed Readings	0.5	2	Main	100%

2022/Fall	BUSI6907	PhD Thesis Tutorial	0.5	31	Main	100%
2022/Fall	BUSI6908	PhD Comprehensives	0.6	13	Main	100%
2022/Fall	BUSI5989	M.Sc. Thesis	0.6	5	Main	100%
2022/Summer	BUSI6900	Directed Readings	0.5	2	Main	100%
2022/Summer	BUSI6907	PhD Thesis Tutorial	0.5	28	Main	100%
2022/Summer	BUSI6908	PhD Comprehensives	0.6	15	Main	100%
2022/Summer	BUSI6909	PhD Thesis	0.6	6	Main	100%
2022/Summer	BUSI5989	M.Sc. Thesis	0.6	4	Main	100%
2022/Winter	BUSI6907	PhD Thesis Tutorial	0.5	10	Main	100%
2022/Winter	BUSI6900	Directed Readings	0.5	0	Main	100%
2021/Fall	BUSI6907	PhD Thesis Tutorial	0.5	25	Main	100%
2021/Fall	BUSI5982	Research Methodology	0.5	6	Main	100%
2021/Fall	BUSI6902	Research Methodology	0.5	15	Main	100%
2021/Fall	BUSI6900	Directed Readings	0.5	0	Main	100%
2021/Winter	BUSI6903	Qualitative Research Design	0.32	9	Main	100%
2021/Winter	BUSI5983	Qualitative Research Design	0.18	5	Main	100%
2021/Winter	BUSI4209	Consumer Culture Theory	0.5	50	Main	100%
2020/Fall	BUSI3204	Marketing: New Tools	0.5	50	Main	100%
2020/Fall	BUSI2208	Introduction to Marketing	0.5	76	Main	100%
2020/Fall	BUSI2208	Introduction to Marketing	0.5	77	Main	100%
2019/Fall	BUSI5900	Directed Studies	0.5	1	Main	100%
2019/Fall	BUSI2208	Introduction to Marketing	0.5	80	Main	100%
2019/Winter	BUSI4229	Marketing in Arts and Culture	0.49	49	Main	100%
2019/Winter	BUSI4209	Consumer Culture Theory	0.5	48	Main	100%
2019/Winter	MKTG5229	Marketing in the Arts and Culture Sectors	0.01	1	Main	100%
2018/Fall	BUSI6902	Research Methodology	0.5	6	Main	100%
2018/Fall	BUSI2208	Introduction to Marketing	0.5	89	Main	100%
2018/Winter	BUSI6201	Seminar in Marketing II	0.5	2	Main	100%
2018/Winter	BUSI4209	Consumer Culture Theory	0.5	36	Main	100%
2018/Winter	BUSI4229	Marketing in Arts and Culture	0.48	31	Main	96%
2018/Winter	MKTG5229	Marketing in the Arts and Culture Sectors	0.02	1	Main	4%
2017/Fall	BUSI2208	Introduction to Marketing	0.38	66	Main	77%
2017/Fall	BUSI2208	Introduction to Marketing	0.01	1	Main	1%
2017/Fall	BUSI2208	Introduction to Marketing	0.12	20	Main	23%
2017/Fall	BUSI2208	Introduction to Marketing	0.49	66	Main	99%
2017/Winter	BUSI6903	Qualitative Research Design	0.5	12	Main	100%
2017/Winter	BUSI4229	Marketing in Arts and Culture	0.5	50	Main	100%

2016/Winter	BUSI4229	Marketing in Arts and Culture	0.5	29	Main	100%
2016/Winter	BUSI4206	Consumer Behaviour	0.5	63	Main	100%
2015/Fall	BUSI4203	Marketing: Not-for-Profit Organizations	0.5	58	Main	100%
2015/Fall	BUSI4206	Consumer Behaviour	0.5	63	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2022-2023 – 2023-2024: Sabina Chowdhury

2018-2019: Jennifer Heaney

2014-2015: Jenna Richards

2010-2011: Catherine Rossiter

University Assignments

PhD. Comprehensive Committees:

2013-2014 – 2015-2016: Laurie Brady

University Assignments

PhD. Thesis Committees:

2016-2017: Internal External Examiner, Michael McLaughlin

External Committees

Thesis Assignments

PhD. Thesis Committees:

2023-2024: William Van Veen

2018-2019: External Examiner: Jessica Darveau, HEC Montreal

Innovation in Teaching Methods

Innovations in Course Content / Presentation

2017 - *Using Archival Resources.*

2015 - *Best Practices for Course-Based Community-Engagement' Panel, Mini-Conference on Community Engagement in Teaching and Research, Carleton University.*

2014 - *Introduction of video as a means of reporting research results (BUSI 4206).*

2014 - *'Teaching Technology with Technology while Flipping the Classroom,' Teaching and Learning Services Symposium on High Impact Practices: Learner Centered Teaching and Engaged Pedagogy, Carleton University..*

2013 - *HootSuite University core curriculum (BUSI 3204).*

2011 - *Invited Panel Member, Educational Development Centre Round Table, Carleton University.*

2010 - *Community engaged pedagogy as teaching method (BUSI 4203).*

2010 - *Working with a Not-for-Profit Cemetery to Teach Marketing Skills: presented as part of panel discussion on teaching at Association for Gravestone Studies Conference..*

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2023-2024 – 2024-2025: Curriculum Review Committee (Graduate Research Programs - PhD and MSc)

2020-2021: Marketing Hiring Committee

H. OTHER

Student Experience Activities

- 2013 - "Welcome to Our Classroom: BUSI 3204 New Tools and Approaches," demonstration lecture. : Arranged by Educational Development Centre, Carleton University, October 29.
- 2015 - "Living Book," Carleton University Library 'Human Library' Mini-Enrichment Course
- 2012 - Invited Judge, ICChange Challenge : Sponsored by SIFE Carleton, Nepean, Ontario, May 26.
- 2015 - Ph.D. Funding Workshop : Presented to Sprott Ph.D. students, October 9.
- 2014 - Ph.D. Funding Workshop : Presented to Sprott Ph.D. students, October 6.
- 2021 - Panel Member, Sprott Marketing Students Association, "Let's Talk Marketing" Career Panel

Credentials

Research Reports

- 2016: Neilson, L., & McShane, L., Closing the Loop: Community Engaged Pedagogy in Business Courses., submitted to Canadian Association of Community Service Learning.
- 2012: Brouard, F., Neilson, L., & Armenakyan, A., Small Charities: An Analysis of Change in Fundraising Activities., submitted to Institute for Nonprofit Studies, Mount Royal University.
- 2012: Neilson, L., Brouard, F., & Armenakyan, A., Fundraising Methods: Past, Present, Future., submitted to Institute for Nonprofit Studies, Mount Royal University.

Service to the Community

Chair of a Committee

- 2017 – 2019: CHARM 2019, Local Arrangements Chair

Other Community Service Activities

- 2014: Invited Judge, BIFHSGO 20th Anniversary Writing Competition

Speech / Presentation at a Community Meeting

- 2011: Canadian Vintners' Association, Annual General Meeting., Neilson, Leighann C. and Judith Madill, "E-Business and the Wine Industry: A Canadian Perspective." Presented to the Canadian Vintners' Association, Annual General Meeting, July 28. Presented by Dr. Neilson.

Curriculum Vitae - Sprott School of Business

Rodney Nelson, PhD
Associate Professor, Teaching Stream - Tenured, 2017
Sprott School of Business (International Business)
Telephone: 613-520-2600 x2397
Email: rodney.nelson@carleton.ca
AACSB Qualification: Practice Academic (PA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-6960-6201>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Carleton University.

Chartered Director. McMaster University; DeGroote School of Business, The Directors College.

Title: *Certificate for director education required to be an effective board and committee member*

Master of Arts. Carleton University.

Bachelor of Arts. Carleton University.

Bachelor of Arts. Carleton University.

Professional Certifications

Certified Aboriginal Professional Administrator, 2013

Professional Aboriginal Economic Development Certificate, 2012

Graduate University Teaching Skills Certificate, 2010

Certificate of Facilitation, Public Service, 2003

B. EMPLOYMENT

Academic Appointments

Instructor III, Carleton University (2020 - Present), Ottawa, Canada-Ontario. I teach Ethics and Cross-Cultural Communications, Business Ethics and Entrepreneurship. My current international research interests include; Agritourism in Northern Italy, economic development with the Moken (sea gypsies) of South East Asia, and development work in Botswana with the San people in conjunction with Botho University. I am also involved in development work with Indigenous people in North America.

Instructor III, Carleton University (2012 - 2019), Ottawa, Canada-Ontario. I taught Introduction to Anthropology, Theory and Methodology, Indigenous Studies, Contemporary Indigenous Issues and introduction to Social Sciences. I managed the Indigenous Enriched Support Program (IESP) at Carleton University, mentorship program and an Internship program. The IESP is an entrance program for Indigenous students that may not meet traditional university admission requirements.

A/Director of Audit and Evaluation, Public Works and Government Services Canada (2005 - 2006), Ottawa, Canada-Ontario. Reporting to the Chief Risk Officer of PWGSC. I managed a team of auditors, evaluators and risk managers. Our branch was responsible for oversight of the department's fiscal responsibilities, governance reporting structures and management accountability framework.

Instructor of Anthropology, Carleton University (1994 - 1996), Ottawa, Canada-Ontario. I was an instructor at the University where I taught Native Studies and Anthropological Research Methodology. I was recognized by the Dean of Social Science for teaching excellence by receiving the highest student evaluation in the department and third overall in social Sciences.

Other Employment

CEO, The Global Governance Group (2020 - Present), Ottawa, Canada-Ontario. I am the current CEO of the Global Governance Group (GGG). This independent consulting firm provides research, training, strategic advice, negotiations and governance guidance to businesses and all levels of government. GGG is actively involved in governance, ethics compliance, sustainability and corporate relations training and consulting with business, economic development organizations, NGO's. GGG is proud to provide advice, guidance and support to several NGO organizations including Kenya Education Foundation, Jabes School, CARE International and others.

Senior Manager, Executive Networks, Conference Board of Canada (2006 - 2009), Ottawa, Canada-Ontario. Chair of the Public Enterprise Governance Centre

Chair Pandemic Preparedness Working Group

Director of the Centre for Aboriginal Issues

Chair of the Council on Corporate Aboriginal Relations

As a senior manager I was responsible for both the corporate governance and Aboriginal portfolios. My role included overall management of a

four-million-dollar budget, staffing, contract management, research and the strategic direction. I sat helped facilitate several negotiations and agreements including the billion-dollar Kitimat container port project and the Churchill hydro projects which had many international partners. I represented Canada to the Asia Pacific Economic Cooperation on emergency preparedness

Ethics Officer, Public Works and Government Services Canada (2003 - 2005), Ottawa, Canada-Ontario. Ethics Officer – I was appointed by the Deputy Minister as the Ethics Officer for Public Works. I sat at the senior management table to ensure compliance to the Values and Ethics Code of the Public Service. Working alongside the Minister, Assistant Deputy Minister and the Chief Risk Officer I was responsible for enhancing the ethical climate of the organization.

Senior Policy Advisor, Public Works and Government Services Canada (2000 - 2003), Ottawa, Canada-Ontario. Senior Policy Advisor – I worked on several national social policies including Ralph Goodale's Good Neighbor Policy, Aboriginal procurement strategies, access to education policies and the National Accommodation Strategy. I co-managed a 5-million-dollar national research innovation fund for the development of new green technologies in the STEM disciplines

CEO, Chair and Owner, Sirius Consulting Ottawa (1996 - 2000), Ottawa, Canada-Ontario. Co-founded a communications and marketing company in 1994. Under my direction as CEO and Chair, I increased capacity to become a national company. Client base included Toronto Dominion Bank, Lafarge and Rogers Cable. I was responsible for the strategic vision, mandate and direction of the company that increased revenues by 300 per cent. Co-founded a communications company in 1994. Under my direction as CEO and Chair, I increased capacity to become a national company increasing the operational budget to over a million dollars. I was responsible for the strategic vision, mandate and direction of the company that increased revenues by over 300 per cent. Client base included fortune 500 companies.

Various Positions, Department of National Defence (1985 - 1994), Various, Canada. Intelligence Officer – I worked during the Gulf War to develop and implement military security procedures to ensure national security. I was a liaison with several international governments and military leaders to ensure coordinated strategies.

Procurement Officer – I developed and delivered innovative supply chain solutions including leveraging Department of National Defence's buying power through implementation and facilitation with United States Government effecting saving of 3-5 million dollars in purchasing power.

IT- Specialist – programmed, supported and maintained the Banyan Vines Wide Area Network for the Department, worked maintaining the Defence mainframes.

Repair and Overhaul – Worked with CF-18 Jet project for repairs and overhauls of Canada's military fleet.

C. PROFESSIONAL HONOURS

- 2018: Carleton University, Service Excellence Award (CIE).
- 2016: Carleton University, New Faculty Excellence in Teaching Award.
- 2013: Carleton University, Dr. Thomas Betz Memorial Award.
- 2013: Carleton University, SF Wise Graduate Award.
- 2012: Ottawa Network for Education, Capital Educator's Award for the Ottawa Region.
- 2012: Diversity 50 Award, Canadian Board Diversity Council.
- 2010: Carleton University, Doctoral Research Award.
- 2010: Carleton University, Colonel William B. Sutherland Graduate Award.
- 2010: New Business of the Year, Ottawa Chamber of Commerce.
- 2009: Carleton University, Doctoral Research Award.
- 2009: New Sun Scholarship, Carleton University.
- 2008: Carleton University, Canadian Studies Graduate Research Scholarship.
- 2007 – 2008: Carleton University, Doctoral Research Award.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		2		2
Articles-in-Progress (All)		3		3
Paper Presentations (Refereed)		2		2
Grants - Funded (both refereed and non-refereed)		7		7

Totals		14	14

Refereed Scholarly Publications

Articles in Refereed Journals

- Nelson, R. (in press, 2021). Creating Locality of Brand: Agritourism in Friuli-Venezia Giulia region of Northern Italy. *Journal of International Development*. [B]
- Nelson, R. (2020). Questions Directors Should Ask About Business Continuity and Recovery During the COVID-19 Pandemic. *International Journal of Disaster Recovery and Business Continuity*, 11 (1), 1479-1485.
*Pending incentive for 2020
- Nelson, R. (2019). Beyond Dependency Economic Development and First Nations in Canada. *SAGE Open*, 9 (3).
- Kimball, A., Arima, Y., French, M., Osaki, C., Nelson, R., Rodney Hoff, Soo-Sim Lee, Lisa Schafer, Koji Nabae, Chang Hsun, Pengiran Hishamuddin, Rodney Nelson, Karalee Woody, Jacqueline Brown, Louis Fox (2009). Pandemic influenza planning: The Asia-Pacific Economic Cooperation Emerging Infections Network. *Journal of Telemedicine and Telecare*, 15 (7), 368-372.
- Laframboise, D., Nelson, R., & Schmaltz, J. (2003). Me change? No way! Managing resistance to change in workplace accommodation projects. *Journal of Facilities Management*, 1 (4), 306-321. [C]

Articles in Refereed Conference Proceedings

Full Paper

- Nelson, R. (2012). Economic Development: The Role of Good Governance. *Aboriginal Resources and Economic Development Forum*.

Chapters in Edited Books

- Nelson, R. (2017). Historical Developmental Colonialism. In Mahmoud Masaali, Lauchlan T. Munro (Ed.), *Canada and the Challenges of International Development and Globalization*. University of Ottawa Press. [Status: Published]
- Nelson, R. (2017). Indigenous Peoples and Western Development: A New Perspective. In Mahmoud Masaali, Lauchlan T. Munro (Ed.), *Canada and the Challenges of International Development and Globalization*. University of Ottawa Press. [Status: Published]
- Nelson, R. (2013). Dispute Resolution the Anthropologist in the Middle. *Cultural Anthropology*. Nelson. [Status: Published]
- Nelson, R. (2013). A Tale of Two First Nation: Traditional Knowledge in Today's Business World. *Cultural Anthropology*. Nelson. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Publications

Other Publications

- 2014: Nelson, R., *A Long Shadow Looms: Opportunity Through Economic Development and Education for Indigenous People in Canada*. BURIC, Botho University Press

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

- Nelson, R. (2021). *Developmental Colonialism and Economic Development*. Global Development, University of Ottawa, Ottawa, Canada-Ontario.
- Nelson, R. (2020). *Economic Development for First Nations*. Global Development, University of Ottawa, Ottawa, Canada-Ontario.
- Nelson, R. (2010). *Economic development and poverty among First Nations in Canada*. Instigate 2010 Anti-Poverty Rant-In Conference, Kingston, Canada-Ontario.
Description: Queen's University
- Nelson, R. (2010). *Recruitment and retention of Native students in colleges and universities: A Canadian experience*. Promoting Student Success Conference, South Bend, Michigan.

Other Presentations

Keynote Address

- 2013: Botho University International Research Conference and the British Council, Gaborone, Botswana. Education and Economic Development Successes

Presentation

- 2023: Unified Health Delivery, Merrit, Canada-British Columbia.
- 2023: Cree First Nation Symposium, Ottawa, Canada-Ontario. Corporate Governance and Reporting
- 2023: Health Service Symposium, Merrit, Canada-British Columbia. Corporate governance in Health Sector
- 2021: Scw'exmx Community Health Services Society. Strategic planning.

2021: Nemaska First Nation. Governance and Traditional Teaching.

2021: CANNEXUS21. Working in a Diverse World: How to Develop Cultural Diplomacy for Success

2020 – 2021: Ottawa Chamber of Commerce. Pandemic Preparedness and COVID-19, Small and Medium Enterprises Roundtable

2020: Carleton University, Ottawa, Canada-Ontario. Pandemic Preparedness in Canada: Are We Ready? Ethics, Business Continuity and Societal Safety. Special Topics, Carleton University, 2020.

2020: CRIW, Sprott School of Business, Ottawa, Canada-Ontario. Virtual Roundtable: The Impact of the COVID-19 Pandemic on Inclusion at Work

2019: Nemaska First Nation. Governance and Board Roles,

2019: World Indigenous Research and Education Conference, Guovdageaidnu/Kautokeino, Norway. Community Capacity Development and Education for Indigenous People

2019: AFOA Conference, Saskatoon, Canada-Saskatchewan. AFOA Conference, Resistance to Change: Organizational Change Management, Saskatoon, 2019.

2018: Tripartite Forum Economic Development Committee.

2018: Millbrooke Mi'kmaq Band.

2017: Southern First Nations Secretariat.

2017: Micmacs of Gesgapegiag First Nation.

2017: Nemaska Cree First Nation.

2017: Canadian Anthropology Society. Pipelines and Puppy-dogs: Economic Realities and Sustainability. Canadian Anthropology Society, Decolonizing Anthropology: Practicing Anthropology with Indigenous Communities

2017: AFOA International Conference, Vancouver, Canada-British Columbia. Sustainable Economic Development and Community Governance: How to Connect Strategy to Economic and Social Outcomes

2017: Modern Treaties and Reconciliation: A New Relationship 150 Years Later, Ottawa, Canada-Ontario. Understanding Meta Data and Ethical Research.

2016: Le'a:mel Nation, Deroche, Canada-British Columbia.

2016: Nemaska Cree First Nation,, Montreal, Canada-Quebec.

2016: Waswanipi Cree First Nation, Waswanipi, Canada-Quebec.

2016: Kingsclear First Nation, Fredericton, Canada-New Brunswick.

2016: Nlaka'pamux Nation.

2016: Indigenous Research Ethics Institute, Ottawa, Canada-Ontario. Ethics and Research with Indigenous Communities

2016: Native American and Indigenous Studies Association conference, Hawaii, Hawaii. Generational Sustainable Development: A Path to Self Determination

2015 – 2016: Emerging Leaders in the Americas Program, Ottawa, Canada-Ontario. Governance and Community Development, Emerging Leaders in the Americas Program, Knowledge exchange between Canadian and Latin American or Caribbean institutions, Ottawa, 2016.

2015: Wikwemikong First Nation, Wikwemikong, Canada-Ontario.

2015: Nibinamik First Nation, Summer Beaver, Canada-Ontario.

2015: Opaskwayak First Nation, The Pas, Canada-Manitoba.

2015: Zelikovitz Centre for Jewish Studies Conference Developing Future Leaders, Ottawa, Canada-Ontario. Self Determination through leadership and Mentoring

2015: Arboretum Festival, Ottawa, Canada-Ontario. Unceded Ottawa: The Algonquin and the Outaouais

2014 – 2015: Waswanipi First Nation, Waswanipi, Canada-Quebec. Evaluation and Reporting for First Nations

2014: Wendake First Nation, Wendake, Canada-Quebec.

2014: Enoch First Nation, Enoch, Canada-Alberta.

2014: Opaskwayak Cree Nation, The Pas, Canada-Manitoba.

2014: Waswanipi Cree First Nation, Waswanipi, Canada-Quebec. Governance for Chief and Council

2014: Opaskwayak Cree Nation, The Pas, Canada-Manitoba. Conflict and Negotiations for First Nations Economic Development Opportunities, Opaskwayak Cree Nation, The Pas Manitoba, 2014.

2013: Whut'en First Nation, Terrace, Canada-British Columbia.

2013: Temagami First Nation, Temagami, Canada-Ontario.

2013: Centre on Values and Ethics, Carleton University, Ottawa, Canada-Ontario. Working with First Nations communities: The ethical debate on economic development.

2013: World Congress on Access to Post-Secondary Education, Montreal, Canada-Quebec. Increasing Access to Education in Canada

2012: Algonquin Tribal Council, Van d'Or, Canada-Quebec.

2011 – 2012: Moose Cree First Nation, Moose Factory, Canada-Ontario.

2011: Fisher River First Nation, Fisher River, Canada-Manitoba.

2011: Aboriginal Financial Officers Association, Vancouver, Canada-British Columbia. "A Traditional Board: Practical Applications for First Nations Board of Directors"

2011: Aboriginal Entrepreneurs Conference, Ottawa, Canada-Ontario. Lessons in Business Strategy Planning

2010: Yellowknife Dene First Nation, Yellowknife, Canada-Northwest Territories.

2010: Aboriginal Financial Officers Association, Ottawa, Canada-Ontario. The Role of Leadership in Community Health - Business Continuity Planning

2010: Aboriginal Financial Officers Association, Ottawa, Canada-Ontario. Incorporating Indigenous Knowledge into Good Board Governance Practices

2010: Council for the Advancement of Native Development Officers, Niagara Falls, Canada-Ontario. Incorporating Indigenous Knowledge into Board Governance Practices

2010: Promoting Student Success Conference, Notre Dame, Indiana. University of Notre Dame, Promoting Student Success Conference, "Recruitment and Retention of Native Students in Colleges and Universities: A Canadian Experience"

2010: Kingston Poverty Conference. Economic Development and Poverty Among First Nations in Canada

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 7 of 7]: Matheson, K. & Nelson, R., Partnership Grant, Collaborator, GOV-Social Sciences and Humanities Research Council (SSHRC). Coapplicant; role: co-investigator in the areas of governance, leadership and traditional knowledge. Youth Futures: Bringing together Indigenous and western approaches to promote youth resilience and prosperity in First Nations communities. [Status: Funded]

2023 [Year 6 of 7]: Matheson, K. & Nelson, R., Partnership Grant, Collaborator, GOV-Social Sciences and Humanities Research Council (SSHRC). Coapplicant; role: co-investigator in the areas of governance, leadership and traditional knowledge. Youth Futures: Bringing together Indigenous and western approaches to promote youth resilience and prosperity in First Nations communities. [Status: Funded]

2022 [Year 5 of 7]: Matheson, K. & Nelson, R., Partnership Grant, Collaborator, GOV-Social Sciences and Humanities Research Council (SSHRC). Coapplicant; role: co-investigator in the areas of governance, leadership and traditional knowledge. Youth Futures: Bringing together Indigenous and western approaches to promote youth resilience and prosperity in First Nations communities. [Status: Funded]

2021 [Year 4 of 7]: Matheson, K. & Nelson, R., Partnership Grant, Collaborator, GOV-Social Sciences and Humanities Research Council (SSHRC). Coapplicant; role: co-investigator in the areas of governance, leadership and traditional knowledge. Youth Futures: Bringing together Indigenous and western approaches to promote youth resilience and prosperity in First Nations communities. [Status: Funded]

2021: Nelson, R. Strategy and Governance Training (\$14,000.00), Principal Investigator, Scw'exmx Community Health Services Society. [Status: Funded]

2021: Nelson, R. Governance and the Cree community (\$13,000.00), Principal Investigator, First Nations Mortgage and Housing Funding. Purpose: Produce governance documents and create a community-based approach to governance for the development corporation Outcome: A report to the development corporation. [Status: Funded]

2020 [Year 3 of 7]: Matheson, K. & Nelson, R., Partnership Grant, Collaborator, GOV-Social Sciences and Humanities Research Council (SSHRC). Coapplicant; role: co-investigator in the areas of governance, leadership and traditional knowledge. Youth Futures: Bringing together Indigenous and western approaches to promote youth resilience and prosperity in First Nations communities. [Status: Funded]

2019 [Year 2 of 7]: Matheson, K. & Nelson, R., Partnership Grant, Collaborator, GOV-Social Sciences and Humanities Research Council (SSHRC). Coapplicant; role: co-investigator in the areas of governance, leadership and traditional knowledge. Youth Futures: Bringing together Indigenous and western approaches to promote youth resilience and prosperity in First Nations communities. [Status: Funded]

2018 [Year 1 of 7]: Matheson, K. & Nelson, R., Partnership Grant, Collaborator, GOV-Social Sciences and Humanities Research Council (SSHRC). Coapplicant; role: co-investigator in the areas of governance, leadership and traditional knowledge. Youth Futures: Bringing together Indigenous and western approaches to promote youth resilience and prosperity in First Nations communities. [Status: Funded]

2018 [Year 5 of 5]: Nelson, R. Indigenous Leadership: Indigenous High School Mentoring & Internship (\$30,000.00), Principal Investigator, Counselling Foundation of Canada.. [Status: Funded]

2018: Nelson, R. Indigenous Community Health Governance (\$20,000.00), Principal Investigator, Interior BC Health Authority. [Status: Funded]

2018: Nelson, R. Indigenous Community Governance Research (\$18,000.00), Principal Investigator, (Interior BC Health Authority. [Status: Funded]

2017 [Year 4 of 5]: Nelson, R. Indigenous Leadership: Indigenous High School Mentoring & Internship (\$30,000.00), Principal Investigator, Counselling Foundation of Canada.. [Status: Funded]

2017: Nelson, R. First Generation Student Partnership Grant (\$15,000.00), Principal Investigator, Ministry of Trade and Colleges and Universities. [Status: Funded]

2016 [Year 3 of 5]: Nelson, R. Indigenous Leadership: Indigenous High School Mentoring & Internship (\$30,000.00), Principal Investigator, Counselling Foundation of Canada.. [Status: Funded]

2016: Nelson, R. Assembly of First Nations E-Governance Project (\$26,000.00), Principal Investigator, Assembly of First Nations. [Status: Funded]

2015 [Year 2 of 5]: Nelson, R. Indigenous Leadership: Indigenous High School Mentoring & Internship (\$30,000.00), Principal Investigator, Counselling Foundation of Canada.. [Status: Funded]

2014 [Year 1 of 5]: Nelson, R. Indigenous Leadership: Indigenous High School Mentoring & Internship (\$30,000.00), Principal Investigator, Counselling Foundation of Canada.. [Status: Funded]

2010: Nelson, R. Aboriginal recruitment strategy (\$6,500.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2010: Nelson, R. Aboriginal Cultural Connections (\$45,000.00), Principal Investigator, Algonquin College. [Status: Funded]

Other Professional Activities

Consulting Experience

2023: Scw'Exmx Health Society, Strategic Plan review

2023: Scw'Exmx Health Society, Strategic plan retreat

2023: Scouts Canada, Diversity, Equity and Inclusion committee

2023: Nlha'7kapmx Nation Health's Board

2023: Nlaka'pamux Health Services Society, Strategic plan

2023: Nlaka'pamux Health Services Society, Board training

2023: Nemaska Development Corporation, Develop Governance policies for Nemaska Economic Development Corporation (2021-2023)

2023: Nemaska Development Corporation, Board Training

2023: Nemaska Cree First Nation, Strategic Plan

2021: Scouts Canada

2021: Cree First Nation Governance

2019 – 2021: Nlha'7kapmx Nation Health Board, Board Governance

2015 – 2021: City of Ottawa, Audit and evaluation of the City's Cultural Funding

2019 – 2020: Dharavi Slums, India, Economic Research and Poverty Reduction through Entrepreneurship

2019: Saami University, Reindeer Herders of Norway: Saami Life and Economics

2019: BC Interior Health

2018: Gesgapegiag First Nation, Creation of the Values and Ethics/ Conflict of Interest documents for Micmacs of Gesgapegiag First Nation

2017: Unknown, Relocation Development Project

2017: Scw'Exmx Health Society, Board training for Scw'Exmx Health Society

2017: Nemaska Cree First Nation Development Corporation, Nemaska Cree First Nation Development Corporation's ByLaws

2017: BC Health Authority and Nlha'7kapmx Nation Health Authorities, Comprehensive Health Policy for Interior BC Health Authority and Nlha'7kapmx Nation Health Authorities

2016: Carleton University, Aboriginal recruitment strategy

2016: Anishinabek Nation Economic Development committee, Consultant for the Anishinabek Nation Economic Development committee

2015: Waswanipi First Nation

2015: Opaskwayak Cree Nation

2014: Anishinabek First Nation Economic Development Committee

2013: Nak'azdli Band, Nak'azdli Band Governance Workshop

2012: Nunasi Corporation, Conflict of Interest and Policy review

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Moderator / Facilitator

2018: Indigenous Movements/ Mouvements autochtones. International Union of Anthropological and Ethnological Sciences, Moderator and Plenary Indigenous Movements/ Mouvements autochtones, 2018.

2013: Indigenous Leadership and Self Governance Conference, Ottawa, Canada-Ontario. "Revising Your Election Code and Using Performance Measurements to Help Conquer Obstacles to Effective Leadership"

Academic Conference: Panelist

2017: American Anthropological Society, Washington D.C, Washington. Indigenous modernity and the concept of Bimaadiziwin: reconciling environmental stewardship and economic development

Board Member: Advisory Board

2020: Corporate Responsibility & Sustainability Council. A council dedicated to share current thought on social responsibility and sustainability.

Board Member: Board of Trustees

2020 – 2023: Canadian Museum of History. Current Governor in Council position

2020 – 2023: Canadian War Museum.

Board of Directors: Substantial Involvement

2020 – 2023: Indigenous Culture and Media Technologies. Providing access to arts through professional development, productions, facilities, and equipment

Chair: Committee / Task Force

2020: Carleton University Aboriginal Education Council. oversees Carleton's Aboriginal Coordinated Strategy reporting to the President and Vice-Chancellor.

2020: FirstPlan Pension and Benefits. An Aboriginal company providing pension and benefits to first nations communities and businesses.

Chair: Conference / Track / Program

2014: Aboriginal Financial Officers Association, Halifax, Canada-Nova Scotia. Session Chair and speaker: Financial Management - Analysis of Debt - Good or Bad - The Ulnooweg Community Report Process,

Keynote Address

2013: Botho University International Research Conference and the British Council, Gaborone, Botswana. Education and Economic Development Successes

Member: Committee/Task Force

2020: Carleton University Senate Finance Review Committee. A committee to oversee fiscal responsibilities and recommend financial advice to the Senate.

Other Professional Service Activities

2021: New Zealand Royal Society. Reviewer for New Zealand Royal Society, Marsden Fund

Reviewer: Ad Hoc Reviewer for a Journal

2021: SAGE.

2019: Geoforum Journal.

2017: Journal of Aboriginal Management.

Reviewer: Book / Textbook

2017: University of Ottawa.

2011: University of Manitoba Press.

Scholarly Work in Progress**Papers Under Review**

Nelson, R. (2020). "Localization of Brand: Agritourism and the Olive Oil Industry in Northern Italy," Initial submission to *Journal of International Development*.

Working Papers

Nelson, R. (2019). "Development and Tourism: Moken Sea Gypsies of South East Asia."

Nelson, R. (2019). "Agri-Tourism in Northern Italy."

F. ACADEMIC RESPONSIBILITIES (TEACHING)**Teaching Schedule**

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI5802	Business Ethics	0.25	19	Main	100%
2024/Winter	BUSI5802	Business Ethics	0.25	21	Main	100%
2024/Winter	BUSI4705	Ethics & Cross-Cultural Interact	0.5	21	Main	100%
2024/Winter	BUSI3750	Applied Intercultural Commerce	0.5	3	Main	100%
2024/Winter	BUSI3750	Applied Intercultural Commerce	0.25	28	Main	100%

2024/Winter	BUSI5802	Business Ethics	0.25	225	Main	100%
2023/Fall	BUSI3750	Applied Intercultural Commerce	0.25	28	Main	100%
2023/Fall	BUSI5802	Business Ethics	0.25	184	Main	100%
2023/Fall	BUSI5802	Business Ethics	0.25	15	Main	100%
2023/Fall	BUSI4705	Ethics & Cross-Cultural Interact	0.5	22	Main	100%
2023/Summer	BUSI5802	Business Ethics	0.25	170	Main	100%
2023/Winter	BUSI5802	Business Ethics	0.25	4	Main	100%
2023/Winter	BUSI5802	Business Ethics	0.25	38	Main	100%
2023/Winter	BUSI4705	Ethics & Cross-Cultural Interact	0.5	13	Main	100%
2023/Winter	BUSI3700	Cross-Cultural Communication	0.5	2	Main	100%
2023/Winter	BUSI3700	Cross-Cultural Communication	0.5	21	Main	100%
2023/Winter	BUSI5802	Business Ethics	0.25	38	Main	100%
2022/Fall	BUSI4705	Ethics & Cross-Cultural Interact	0.5	22	Main	100%
2022/Fall	BUSI3700	Cross-Cultural Communication	0.5	21	Main	100%
2022/Fall	STGY5900	Corporate & Business Strategy	0.5	26	Main	100%
2022/Fall	BUSI5802	Business Ethics	0.25	38	Main	100%
2022/Fall	STGY5900	Corporate & Business Strategy	0.5	26	Main	100%
2022/Fall	BUSI5802	Business Ethics	0.25	19	Main	100%
2022/Winter	BUSI5802	Business Ethics	0.25	29	Main	100%
2022/Winter	BUSI5802	Business Ethics	0.25	28	Main	100%
2022/Winter	BUSI4707	Regionalism & Globalization	0.5	50	Main	100%
2022/Winter	BUSI4705	Ethics & Cross-Cultural Interact	0.5	31	Main	100%
2022/Winter	BUSI3700	Cross-Cultural Communication	0.5	11	Main	100%
2021/Fall	BUSI4705	Ethics & Cross-Cultural Interact	0.5	26	Main	100%
2021/Fall	BUSI3700	Cross-Cultural Communication	0.5	32	Main	100%
2021/Winter	BUSI4601	Business Ethics	0.5	53	Main	100%
2021/Winter	BUSI3700	Cross-Cultural Communication	0.5	6	Main	100%
2021/Winter	BUSI4705	Ethics & Cross-Cultural Interact	0.5	45	Main	100%
2020/Fall	BUSI4705	Ethics & Cross-Cultural Interact	0.5	39	Main	100%
2020/Fall	BUSI3700	Cross-Cultural Communication	0.5	37	Main	100%
2020/Winter	BUSI4705	Ethics & Cross-Cultural Interact	0.5	33	Main	100%
2020/Winter	BUSI4601	Business Ethics	0.5	49	Main	100%
2019/Fall	BUSI4705	Ethics & Cross-Cultural Interact	0.5	40	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2021-2022: Alicia Melatti, Applied Linguistics and Discourse Studies

2017-2018: Monique Montache, School of Indigenous and Canadian Studies

2015-2016: Taleen Boudakian, Department of Law and Legal Studies

PhD. Thesis Committees:

2021-2022: Fahad Ahmad, Public Policy

2021-2022: Carel Rethmeier, Physics

2021-2022: Paul Smith, Physics

2019-2020: Kama E. Szereszowski, Biology

2019-2020: Christine Chisholm, History

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Other Activities

2021 - Fundraising: Student Experience Fund, private donor : To aid Indigenous Enriched Support Program (IESP) students in need of emergency funds and to support student's activities within the IESP Program

Credentials

Professional Memberships

Aboriginal Financial Officers Association, N/A

American Anthropological Society, N/A

Canadian Anthropological Society, N/A

Canadian Board Diversity Council, N/A

Council for the Advancement of Native Development Officers, N/A

Executive or Professional Education

2021 - Certified Aboriginal Professional Administrator courses. [Activity: Design of Executive Education]

2021 - Volunteer Ottawa and Diversity Ottawa. [Activity: Design of Executive Education]

2020 - Certified Aboriginal Professional Administrator courses,. [Activity: Design of Executive Education]

2020 - Volunteer Ottawa and Diversity Ottawa. [Activity: Design of Executive Education]

2019 - Certified Aboriginal Professional Administrator courses. [Activity: Design of Executive Education]

2019 - Volunteer Ottawa and Diversity Ottawa. [Activity: Design of Executive Education]

2018 - Volunteer Ottawa and Diversity Ottawa. [Activity: Design of Executive Education]

2017 - Volunteer Ottawa and Diversity Ottawa. [Activity: Design of Executive Education]

2016 - Certified Aboriginal Professional Administrator courses. [Activity: Design of Executive Education]

2015 - Certified Aboriginal Professional Administrator courses. [Activity: Design of Executive Education]

2014 - Certified Aboriginal Professional Administrator courses. [Activity: Design of Executive Education]

2013 - Certified Aboriginal Professional Administrator courses. [Activity: Design of Executive Education]

2012 - Certified Aboriginal Professional Administrator courses. [Activity: Design of Executive Education]

2011 - Certified Aboriginal Professional Administrator courses. [Activity: Design of Executive Education]

2010 - Certified Aboriginal Professional Administrator courses,. [Activity: Design of Executive Education]

Service to the Community

Other Community Service Activities

2017 – 2023: Beyond Board Basics Workshops

Curriculum Vitae - Sprott School of Business

Howard Nemiroff, PhD
Associate Professor - Tenured, 2008
Sprott School of Business (Finance)
Telephone: 613-520-2600 x2038
Email: howard.nemiroff@carleton.ca
AACSB Qualification: Practice Academic (PA) , Participation: Participating
Orcid: <https://orcid.org/0000-0002-7798-1789>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Concordia University.
Title: *PhD in Administration (conferred 1997). AACSB accredited.*
Master of Arts. Concordia University.
Bachelor of Arts. University of Western Ontario.

B. EMPLOYMENT

Academic Appointments

Associate Dean, Undergraduate Studies, Sprott School of Business, Carleton University (July, 2013 - Present), Ottawa, Canada-Ontario.

Associate Professor, Sprott School of Business, Carleton University (July, 2008 - Present), Ottawa, Canada-Ontario. Granted tenure and promotion, July 2008.

Faculty Advisor, Sprott School of Business, Carleton University (January, 2007 - Present), Ottawa, Canada-Ontario. Sprott Student Investment Fund.

Assistant Professor, Sprott School of Business, Carleton University (July, 2006 - June, 2008), Ottawa, Canada-Ontario.

Financial Markets Center, Department of Finance, Long Island University (September, 2004 - August, 2006), Brookville, New York. Proposed and championed a new Financial Markets Research Center. This involved the creation and supervision of a state-of-the-art money management/trading room facility.

Assistant Professor, Department of Finance, Long Island University (September, 2001 - August, 2006), Brookville, New York. Appointed tenure track Assistant Professor September 2001. Courses included Introduction to Corporate Finance, Investments and Derivatives at the undergraduate level, and Investments and Portfolio Management at the Masters level.

Adjunct Professor, Department of Finance and Economics, Adelphi University (September, 2004 - August, 2005), Garden City, New York.

Adjunct Professor, Department of Finance, Long Island University (June, 2001 - August, 2001), Brookville, New York. Appointed adjunct professor to teach Graduate Money and Banking, and to teach Graduate Investments.

Assistant Professor, Department of Accounting and Finance, Brock University (July, 1999 - May, 2001), St. Catharines, Canada-Ontario. Appointed tenure track Assistant Professor July 1999. Courses included Introduction to Financial Management and Portfolio Management at the undergraduate level, and Capital Markets at the Masters level (Macc). Committee member involved in the creation and formal Government application of an MBA program commencing September 2002.

Assistant Professor, Department of Finance and Management Science, Saint Mary's University (May, 1997 - July, 1999), Halifax, Canada-Nova Scotia. Tenured. Appointed tenure track Assistant Professor May 1997. Courses included Introduction to Financial Management, Advanced Topics in Investments, Portfolio Management, and Fixed Income Securities at both the Undergraduate and Masters levels. Responsible for the inception, coordination and implementation of the Fixed Income Securities course, and of the CFA preparatory course offered to level 1 CFA students in Halifax. Teaching evaluations are available on request. Tenure granted May 1999.

Lecturer, Department of Finance and Management Science, Saint Mary's University (September, 1995 - May, 1997), Halifax, Canada-Nova Scotia. Appointed lecturer prior to the completion of Ph.D

Lecturer, Department of Finance, Concordia University (September, 1989 - July, 1995), Montreal, Canada-Quebec. A teaching load of 3 courses per academic year during doctoral studies (a total of 19 courses), where all courses were taught with full responsibility. Courses included Introduction to Financial Management, Finance Theory, Investments and Corporate Finance Theory. Teaching evaluations are available on request.

Other Employment

Lead Instructor, Becker Professional Education (January, 2010 - September, 2010), Ottawa, Canada. Responsible for the coordination of all instruction for the Level II CFA prep course offered in Ottawa in 2010. I was also involved in delivering some of the lectures.

Instructor, The Society of Management Accountants of Ontario (May, 2008 - September, 2008), Ottawa, Canada. Involved with the society in the delivery of the corporate finance material to prospective CMA candidates in preparation for the exam.

Professional Development Seminar Lecturer, Institute of Canadian Bankers (November, 1997 - August, 2001), Ottawa, Canada. Involved with the Institute in the delivery of professional development courses in Branch Compliance to bankers throughout Canada with regard to the legal and ethical responsibilities concerning in-house and third party mutual fund sales.

Consultant, Department of Finance, Concordia University (January, 1993 - June, 1994), Montreal, Canada. Worked with Dr. A. Jalilvand on behalf of BCE Inc. concerning rate hearings in front of the CRTC. Responsibilities included both the preparation and the defense of arguments to the CRTC.

Consultant, Department of Finance, Concordia University (September, 1992 - June, 1994), Montreal, Canada. Worked with Dr. A. Jalilvand on behalf of TQM Inc., concerning rate hearings in front of the Energy Board. Responsibilities included both the preparation and the defense of arguments to the board.

Research Assistant, Department of Finance, Concordia University (January, 1989 - August, 1989), Montreal, Canada. Worked with Dr. Lorne Switzer regarding existence of market return anomalies due to ethic holidays (days when the exchange remains open). Responsibilities included all aspects of the research project.

Research Assistant, Department of Finance, Concordia University (August, 1988 - December, 1988), Montreal, Canada. Worked with Drs. L. Kryzanowski and L. Switzer developing a statistical analysis of the stock market crash of October 1987. Responsibilities included all aspects of the research project.

Research Assistant, Department of Economics, Concordia University (May, 1986 - December, 1987), Montreal, Canada. Worked with Dr. D. Shapiro (Concordia, now SFU) and Dr. S. Khemani (Consumer and Corporate Affairs) regarding the persistence of excessive profits among leading Canadian firms. Responsibilities included all aspects of the project.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Grants - Funded (both refereed and non-refereed)		2		2
Totals		2		2

Refereed Scholarly Publications

Articles in Refereed Journals

Wakil, G., & Nemiroff, H. (2017). Dividend Taxation and Stock Returns: Time Series Analysis of Canada and Comparison with the United States. *Canadian Tax Journal*, 65 (1), 1-36. [A+]

Wright, S., Nemiroff, H., & Owens, J. (2016). An Empirical Analysis of New Rules Adopted Under National Market System: Pilot Phase Period Implementation Results. *BRC Academy Journal of Business*, 6 (1), 89-114.

Articles in Refereed Conference Proceedings

Full Paper

Wakil, G., & Nemiroff, H. (2012). Dividend Taxation Changes and Stock Returns: An Analysis of Canadian Stocks from 1987-2010. *Financial Markets and Corporate Governance Conference*.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Nemiroff, H. (2014, April). *Electronic Trading in the US Equity Markets, Friend or Foe?* Eastern Finance Association (EFA), Pittsburgh, Pennsylvania. Description: With Susan Wright (Clarkson University).

Wakil, G. & Nemiroff, H. (2011). *Dividend Taxation Changes and Stock Returns: An Analysis of Canadian Stocks from 1987-2010*. Financial Markets and Corporate Governance Conference, Bangalore, India. Description: Proceedings of India Finance Conference.

Nemiroff, H. (2010). *Intraday Price Discovery Following Stale News*. Multinational Finance Association, Barcelona, Spain.

Wakil, G. & Nemiroff, H. (2010). *Dividend Taxation Changes and Stock Returns: An Analysis of Canadian Stocks from 1987-2010*. American Accounting Association, Palm Springs, California.

Description: AAA International Accounting Section Mid-Year Meeting, (earlier version of 2012 paper)

Contract or Other Research

Research Grants and Awards

Grants

2022: Nemiroff, H. Business Strategy Internship (\$5,000.00), Principal Investigator, PRI-Mitacs. [Status: Funded]

2022: Nemiroff, H. Mitacs Business Strategy Internship (\$5,000.00), Principal Investigator, African Bronze Honey Company Limited. [Status: Funded]

Other Professional Activities**Scholarly Work in Progress****F. ACADEMIC RESPONSIBILITIES (TEACHING)****Teaching Schedule**

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	FINA5511	Investments	0.25	26	Main	100%
2023/Fall	FINA5511	Investments	0.25	28	Main	100%
2023/Fall	FINA5511	Investments	0.25	23	Shanghai	100%
2023/Summer	FINA5511	Investments	0.25	15	Main	100%
2023/Summer	BUSI4906	Research Project for Business	1	1	Main	100%
2023/Summer	BUSI4905	Directed Studies II	0.5	5	Main	100%
2023/Winter	BUSI3502	Principles of Investments	0.5	34	Main	100%
2023/Winter	FINA5511	Investments	0.25	1	Main	100%
2022/Fall	BUSI4503	Applied Portfolio Management	0.5	3	Main	100%
2022/Summer	FINA5511	Investments	0.25	39	Shanghai	100%
2022/Summer	BUSI4905	Directed Studies II	0.5	2	Main	100%
2022/Winter	BUSI4609	Strategic Management	0.5	0	Main	100%
2022/Winter	BUSI3309	Project Management	0.5	0	Main	100%
2022/Winter	BUSI3502	Principles of Investments	0.5	48	Main	100%
2022/Winter	BUSI3701	Practicum in International Business I	0.5	0	Main	100%
2022/Winter	BUSI3702	Practicum in International Business II	0.5	0	Main	100%
2022/Winter	BUSI4503	Applied Portfolio Management	0.5	0	Main	100%
2022/Winter	BUSI4800	Sprott Student Consulting II	0.5	2	Main	100%
2022/Winter	BUSI4904	Directed Studies I	0.5	5	Main	100%
2022/Winter	BUSI4905	Directed Studies II	0.5	0	Main	100%
2022/Winter	BUSI3800	Business Case Analysis	0.5	0	Main	100%
2021/Fall	FINA5511	Investments	0.25	34	Shanghai	100%
2021/Fall	BUSI4905	Directed Studies II	0.5	2	Main	100%
2021/Fall	BUSI4904	Directed Studies I	0.5	5	Main	100%
2021/Fall	BUSI4800	Sprott Student Consulting II	0.5	3	Main	100%
2021/Fall	BUSI4609	Strategic Management	0.5	0	Main	100%
2021/Fall	BUSI4503	Applied Portfolio Management	0.5	1	Main	100%
2021/Fall	BUSI3702	Practicum in International Business II	0.5	0	Main	100%
2021/Fall	BUSI3701	Practicum in International Business I	0.5	3	Main	100%
2021/Fall	BUSI3309	Project Management	0.5	0	Main	100%
2021/Summer	BUSI4905	Directed Studies II	0.5	4	Main	100%

2021/Summer	BUSI4905	Directed Studies II	0.5	3	Main	100%
2021/Winter	BUSI4904	Directed Studies I	0.5	5	Main	100%
2021/Winter	BUSI4503	Applied Portfolio Management	0.5	2	Main	100%
2021/Winter	BUSI3502	Principles of Investments	0.5	49	Main	100%
2020/Fall	FINA5511	Investments	0.25	29	Shanghai	100%
2020/Fall	BUSI4904	Directed Studies I	0.5	5	Main	100%
2020/Summer	BUSI4905	Directed Studies II	0.5	5	Main	100%
2020/Winter	BUSI4905	Directed Studies II	0.5	7	Main	100%
2020/Winter	BUSI4503	Applied Portfolio Management	0.5	1	Main	100%
2020/Winter	BUSI3502	Principles of Investments	0.5	55	Main	100%
2019/Fall	BUSI4905	Directed Studies II	0.5	21	Main	100%
2019/Fall	BUSI4905	Directed Studies II	0.5	25	Main	100%
2019/Summer	FINA5511	Investments	0.25	42	Shanghai	100%
2019/Winter	BUSI3502	Principles of Investments	0.5	46	Main	100%
2019/Winter	BUSI4905	Directed Studies II	0.5	31	Main	100%
2018/Fall	BUSI4905	Directed Studies II	0.5	10	Main	100%
2018/Summer	FINA5511	Investments	0.25	30	Shanghai	100%
2018/Summer	FINA5511	Investments	0.25	19	Shanghai	100%
2018/Winter	BUSI3502	Principles of Investments	0.06	7	Main	12%
2018/Winter	BUSI3502	Principles of Investments	0.44	51	Main	88%
2017/Winter	BUSI4503	Applied Portfolio Management	0.5	2	Main	100%
2017/Winter	BUSI3502	Principles of Investments	0.5	55	Main	100%
2016/Fall	BUSI4905	Directed Studies II	0.5	7	Main	100%
2016/Fall	BUSI4503	Applied Portfolio Management	0.5	0	Main	100%
2016/Winter	BUSI3502	Principles of Investments	0.05	3	Main	10%
2016/Winter	BUSI4905	Directed Studies II	0.42	5	Main	83%
2016/Winter	BUSI4503	Applied Portfolio Management	0.5	3	Main	100%
2016/Winter	BUSI3502	Principles of Investments	0.45	26	Main	90%
2016/Winter	BUSI4905	Directed Studies II	0.08	1	Main	17%
2015/Fall	BUSI4905	Directed Studies II	0.5	4	Main	100%
2015/Summer	FINA5512	Valuation	0.25	22	Bogota	100%

Service to the institution (Academic)

External Committees

Thesis Assignments

PhD. Thesis Committees:

2010-2011: External Examiner, Stephen James MacLean

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: Strategic Planning Task Force (Co-Chair)
2024-2025: FTPC Committee (Co-Chair)
2023-2024: FTPC Tenure & Promotion Committee - Faculty
2022-2023: BIB Task Force
2022-2023: Curriculum Review Committee (Undergraduate Programs)
2021-2022: Business Analytics Concentration Task Force
2016-2017 – 2021-2022: Curriculum Review Committee (Undergraduate Programs - BCom/BIB)
2018-2019 – 2020-2021: Entrepreneurship Redesign Committee
2018-2019 – 2020-2021: BIB Redesign Committee
2017-2018 – 2020-2021: Business Committee on Admissions and Studies
2018-2019: Hiring Committee - Indigenous Leadership and Management Faculty
2016-2017: Hiring Committee - Project-Based Learning Instructor
2015-2016: Curriculum Review Committee (Undergraduate)

University Assignments

Chair:

2018-2019 – 2021-2022: Senate Committee on Curriculum, Admission and Studies Policy (SCCASP)
2015-2016 – 2017-2018: Senate Committee on Curriculum, Admission and Studies Policy

Unassigned

University Assignments

Other Committees:

2019-2020: CUPE4600-1 collective agreement

Credentials

Service to the Community

Other Community Service Activities

2012 – 2017: Ottawa Jewish Community Foundation, Investment Committee Member. Responsible for the oversight of money management on a community portfolio worth over \$60M.

Curriculum Vitae - Sprott School of Business

Aaron Nsakanda, PhD
Associate Professor - Tenured, 2005
Sprott School of Business (Technology and Operations/Supply Chain Management)
Telephone: 613-520-2600 x2210
Email: aaron.nsakanda@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
Orcid: <https://orcid.org/0000-0001-7954-7882>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Laval University.
Title: *School of Business*

Master of Business Administration. School of Business, Laval University.

Bachelor of Arts. School of Forestry, Laval University.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (July, 2008 - Present), Ottawa, Canada-Ontario.

Assistant Professor, Sprott School of Business, Carleton University (July, 2001 - June, 2008), Ottawa, Canada-Ontario.

Other Employment

Senior OR Analyst (Air Canada), Operations Research and Business Innovation Solutions Group, Information Technology Division (January, 1998 - June, 2001), Montreal, Canada-Quebec.

Lecturer, Department Operations and Decision Systems, School of Business, Laval University (1993 - 1997), Laval, Canada-Quebec.

Research/Teaching Assistant, Department of Operations and Decision Systems, School of Business, Laval University (1989 - 1997), Laval, Canada-Quebec.

Intern, Ouellet Canada Inc. (1990 - 1991), L'Islet sur Mer, Canada-Quebec.

Forest Technician, Ministry of Energy and Resources (June, 1988 - June, 1989), Lebel sur Quévillon, Canada-Quebec.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		3		3
Publications in Conference Proceedings (Refereed)	1	1		2
Publications of Non-refereed or Invited Papers				0
Research Report, Non-Refereed		1		1
Grants - Funded (both refereed and non-refereed)	2		1	3
Totals	3	5	1	9

Refereed Scholarly Publications

Articles in Refereed Journals

Mkansi, M., & Nsakanda, A. (2023). Mobile application e-grocery retail adoption challenges and coping strategies: a South African small and medium enterprises' perspective. *Electronic Commerce Research*. [A]

Nsakanda, A. (2021). Introduction to the Supplement: Advancing the practice of operations management and innovation to drive Africa forward in the era of the Fourth Industrial Revolution (4IR). *Africa Journal of Management*, 7, 6-16. [B]

Mkansi, M., & Nsakanda, A. (2021). Leveraging the physical network of stores in e-grocery order fulfilment for sustainable competitive advantage. *Research in Transportation Economics*. [B]

Niroomand, I., & Nsakanda, A. (2018). Improving collection flows in a public postal network with contractor's obligations considerations. *International*

Journal of Production Economics, 198, 79-92. [A]

Cao, Y., Nsakanda, A. L., & Diaby, M. (2015). Modeling and planning the supply of rewards with stochastic demands in coalition loyalty programs: A mathematical programming approach. *Journal of the Operational Research Society*, 66 (7), 1140-1154. [A]

Cao, Y., Nsakanda, A. L., Diaby, M., & Armstrong, M. (2015). Rewards-supply planning under option contracts in managing coalition loyalty programs. *International Journal of Production Research*, 53 (22), 6772-6786. [A]

Diaby, M., Cruz, J., & Nsakanda, A. L. (2013). Shortening cycle times in multi-products, capacitated production environments through quality level improvements and setup reduction. *European Journal of Operational Research*, 228 (3), 526-535. [A+]

Cao, Y., Nsakanda, A. L., & Diaby, M. (2012). A Stochastic Linear Programming Modeling and Solution Approach for Planning the Supply of Rewards in Loyalty Reward Programs. *International Journal of Mathematics in Operational Research*, 4 (4), 400-421.

Nsakanda, A. L., Diaby, M., & Cao, Y. (2011). An aggregate inventory-based model for predicting redemption and liability in loyalty reward programs industry. *Information Systems Frontiers*, 13 (5), 707-719. [A]

Diaby, M., Cruz, J., & Nsakanda, A. L. (2011). Project crashing in the presence of general non-linear activity time reduction costs. *International Journal of Operational Research*, 12 (3), 318-332. [C]

Nsakanda, A. L., Diaby, M., & Price, W. L. (2010). A price-directed decomposition approach for solving large-scale capacitated part-routing problems. *International Journal of Production Research*, 48 (14), 4273-4295. [A]

Nsakanda, A. L., Diaby, M., & Cao, Y. L. (2010). Solving capacitated part-routing problems with set-up times and costs: A Dantzig-Wolfe based solution approach. *International Transactions in Operational Research*, 18 (1), 71-86. [B]

Articles in Refereed Conference Proceedings

Full Paper

Mkansi, M., & Nsakanda, A. (2023). Leveraging Internet of Things Technologies to Drive Societal-Based Decarbonisation in the Transport Sector: Green Mobile Application. *International Congress on Information and Communication Technolog*, 4.

Mejic, M., & Nsakanda, A. (2019). Towards a Model of predicting the success of a Modelling Project: the road path from conception to implementation. *Administrative Sciences Association of Canada (ASAC)*.

Niroomand, I., & Nsakanda, A. (2017). Collection flows improvements with contractor's obligation considerations in a public postal network. *Northeast Decision Sciences Institute (NEDSI) Conference*.

Springfield, USA, March 22-25

Dostaler, I., Lloyd, S., Nsakanda, A., & Virk, R. (2017). Measuring the competitiveness of Canadian national airports under various regulatory and ownership structures. *Annual World Conference of the Air Transport Research Society*.

Antwerp, Belgium, July 6-8

Nsakanda, A., Grant, G., Vafaei, M., & Leafloor, M. (2015). A simulation modeling approach to understanding workflow changes in healthcare: The case of CPOE deployment at The Ottawa Hospital. *Hawaii International Conference on System Sciences (HICSS)*.

January 5-8, 2015. Kauai, Hawaii.

Qu, G., Ji, S., & Nsakanda, A. L. (2012). Project complexity and Knowledge Transfer in Global outsourcing Project teams. *Hawaii International Conference on System Sciences (HICSS)*.

January 4-7, 2012. Hawaii, USA.

Qu, G., Ji, S., & Nsakanda, A. L. (2012). Complexity and Knowledge Transfer in Global Software Outsourcing Project Teams: A Transactive Memory Systems Perspective. *Hawaii International Conference on System Sciences (HICSS)*, 3776-3785.

January 4-7, 2012. Maui, Hawaii, USA.

Cao, Y., Nsakanda, A. L., Diaby, M., Ji, S., & Hine, M. J. (2012). Exploring Contracts With Options in Loyalty Reward Programs Supply Chain. *Hawaii International Conference on System Sciences (HICSS)*, 1257-1266.

January 4-7, 2012. Maui, Hawaii, USA. Nominated for best paper.

Nsakanda, A. L., Diaby, M., & Cao, Y. (2010). A predictive model of redemption and liability in loyalty reward programs industry. *Hawaii International Conference on System Sciences (HICSS)*.

January 5-8, 2010. Koloa, Hawaii.

Cao, Y., Nsakanda, A. L., & Diaby, M. (2010). Coping with the Planning of Rewards Supply in Loyalty Reward Programs– A Mathematical Formulation Model. *Annual Conference of the Production and Operations Management Society (POMS)*.

May 7-10, 2010. Vancouver, British Columbia.

Cao, Y., Nsakanda, A. L., & Diaby, M. (2010). Aggregate planning of rewards-supply in loyalty reward programs. *Administrative Sciences Association of Canada (ASAC)*.

May 22-24, 2010. Regina, Saskatchewan.

Cao, Y., Nsakanda, A. L., & Mann, I. J. (2010). A Typology Framework of Loyalty Reward Programs. In Zaman M. et al. (Ed.) *International Conference on E-business Technology & Strategy (CETS)*, 159-170.

September 29-30, 2010. Ottawa, Ontario, Canada.

Cao, Y., Nsakanda, A. L., & Diaby, M. (2010). Planning the Supply of Rewards in Loyalty Reward Programs- A Supply Chain Perspective. *Decision*

Other (Non-refereed) Scholarly Publications

Invited Articles/Review articles

Nsakanda, A. (2021). Advancing the practice of operations management and innovation to drive Africa forward in the era of the 4th industrial revolution. *Africa Journal of Management*, 1.

Other Publications

Other Publications

2017: Dostaler, I., & Nsakanda, A., *Canadian airports' business model*. Air and Space Academy Newsletter, no 104, 2 pages, Toulouse (France)

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Guest Editor of Journal

2020: African Journal of Management (International). Special issue on "advancing the practice of operations management and innovation to drive Africa forward in the era of the 4th industrial revolution",

Presentations

Papers Presented at Conferences

Refereed

Nsakanda, A. & Diaby, M. (2018). *Dynamic Lot-sizing in a reverse logistics environment*. European Conference on Operational Research,, Valencia, Italy.

Dostaler, I., Lloyd, S., Nsakanda, A., & Virk, R. (2017). *Measuring the competitiveness of Canadian national airports under various regulatory and ownership structures*. Annual World Conference of the Air Transport Research Society, Antwerp, Belgium.

Description: July 6-8, 2017

Nsakanda, A. & Niroomand, I. (2017). *Collection flows improvements with contractor's obligation considerations in a public postal network*. Northeast Decision Sciences Institute (NEDSI) Conference, Springfield, Illinois.

Description: Management science, Operations research

Nsakanda, A., Grant, G., Vafei, M., & Leafloor, M. (2015). *A simulation modeling approach to understanding workflow changes in healthcare: The case of CPOE deployment at the Ottawa Hospital*. Hawaii International Conference on System Sciences (HICSS), Maui, Hawaii.

Diaby, M. & Nsakanda, A. (2014). *Dynamic Lot-sizing with Returns at Costs*. Canadian Operations Research Society, Ottawa, Canada-Ontario.

Cao, Y., Nsakanda, A., Diaby, M., Ji, S., & Hine, M. J. (2012). *Exploring Contracts with Options in Loyalty Reward Programs Supply Chain*. Hawaii International Conference on System Sciences (HICSS), Maui, Hawaii.

Description: January 4-7

Nsakanda, A., Cao, Y., & Diaby, M. (2012). *Contracts with Options in Loyalty Reward Programs Supply Chain*. Institute for Operations Research and Management Sciences (INFORMS) International Conference, Phoenix, Arizona.

Description: October 14-17

Qu, G., Ji, S., & Nsakanda, A. (2012). *Project complexity and Knowledge Transfer in Global outsourcing Project teams*. Hawaii International Conference on System Sciences (HICSS), Maui, Hawaii.

Description: January 4-7

Nsakanda, A., Cao, Y., Friedrichs, P., Smyth, D., & Diaby, M. (2011). *Airport Delay Analysis through Simulation*. Institute for Operations Research and Management Sciences (INFORMS) International Conference, Chicago, Illinois.

Description: April 10-12

Nsakanda, A., Diaby, M., & Cao, Y. (2011). *An aggregate inventory-based model for predicting redemption and liability in loyalty rewards program industry*. Northeast Decision Sciences Institute (NEDSI) Conference, Montreal, Canada-Quebec.

Nsakanda, A., Cao, Y., Friedrichs, P., & Smyth, D. (2011). *Airport Delay Analysis through Simulation*. Sprott Seminar Series, Ottawa, Canada-Ontario.

Cao, Y., Nsakanda, A., & Diaby, M. (2010). *Planning the Supply of Rewards in Loyalty Reward Programs- A Supply Chain Perspective*. Decision Sciences Institute Annual Meeting, San Diego, California.

Description: November 20-23

Cao, Y., Nsakanda, A., & Diaby, M. (2010). *Coping with the Planning of Rewards Supply in Loyalty Reward Programs– A Mathematical Formulation Model*. POMS Conference, Vancouver, Canada-British Columbia.

Description: May 7-10

Nsakanda, A., Diaby, M., & Cao, Y. (2010). *A predictive model of redemption and liability in loyalty reward programs industry*. Hawaii International Conference on System Sciences (HICSS), Koloa, Hawaii.

Description: January 5-8

Nsakanda, A., Diaby, M., & Cao, Y. (2010). *A predictive model of redemption and liability in loyalty reward programs industry*. Hawaii International Conference on System Sciences (HICSS), Koloa, Hawaii.

Cao, Y., Nsakanda, A., & Diaby, M. (2010). *Aggregate planning of rewards-supply in loyalty reward programs*. Administrative Sciences Association of Canada (ASAC), Regina, Canada-Saskatchewan.

Description: May 22-24

Other Presentations

Invited Lecture

2022: University of South Africa. Invited Panelist, University of South Africa event on defining climate solutions, October 26, 2022; Pretoria (South Africa).

2019: African Operations Management Conference, Pretoria, South Africa. Invited Workshop Guest Speaker at the second African Operations Management Conference, title: "Writing for Publication", June 4-6, 2019, Pretoria (South Africa).

Presentation

2022: TEDX University of South Africa. Invited Speaker at TEDX University of South Africa; presentation title: "Fostering societal-based green solutions adoption through models of coalition reward loyalty programs;" October 26, 2022; Pretoria (South Africa).

2015: Bureau Central de Coordination, Ministère des finances, Kinshasa, Congo. Guest Speaker at the inaugural BCECO Project Management Seminar Series, Nov 6-7, 2015.

2010: Canadian Operations Research Society (CORS), Ottawa Chapter, Ottawa, Canada-Ontario. Invited speaker, Presentation title: "Coping with the planning of rewards supply in loyalty reward programs".

Contract or Other Research

Research Grants and Awards

Grants

2027 [Year 4 of 4]: Nsakanda, A. Africa-Nuanced Sustainable Development Goals Research Support Programme, Principal Investigator, University of South Africa. [Status: Pending]

2026 [Year 3 of 4]: Nsakanda, A. Africa-Nuanced Sustainable Development Goals Research Support Programme, Principal Investigator, University of South Africa. [Status: Pending]

2025 [Year 2 of 4]: Nsakanda, A. Africa-Nuanced Sustainable Development Goals Research Support Programme, Principal Investigator, University of South Africa. [Status: Pending]

2024 [Year 1 of 4]: Nsakanda, A. Africa-Nuanced Sustainable Development Goals Research Support Programme, Principal Investigator, University of South Africa. [Status: Pending]

2021: Nsakanda, A. eCampus Ontario (\$0.00), Principal Investigator, eCampus Ontario. [Status: Funded]

2020 [Year 5 of 5]: Nsakanda, A. Discovery Grant (\$20,000.00 of a total grant amount of \$100,000.00), Principal Investigator, GOV-Natural Sciences and Engineering Research Council of Canada (NSERC). [Status: Funded]

2020: Nsakanda, A. Carleton University Internal Award (\$10,000.00 Not Funded), Principal Investigator, Carleton University, Vice-President (Resch & Int'l). [Status: Not Funded]

2019 [Year 4 of 5]: Nsakanda, A. Discovery Grant (\$20,000.00 of a total grant amount of \$100,000.00), Principal Investigator, GOV-Natural Sciences and Engineering Research Council of Canada (NSERC). [Status: Funded]

2018 [Year 3 of 5]: Nsakanda, A. Discovery Grant (\$20,000.00 of a total grant amount of \$100,000.00), Principal Investigator, GOV-Natural Sciences and Engineering Research Council of Canada (NSERC). [Status: Funded]

2017 [Year 2 of 5]: Nsakanda, A. Discovery Grant (\$20,000.00 of a total grant amount of \$100,000.00), Principal Investigator, GOV-Natural Sciences and Engineering Research Council of Canada (NSERC). [Status: Funded]

2017: Nsakanda, A. Unicef - Contract (\$86,500.00 Pending), Principal Investigator, Unicef. [Status: Pending]

2016 [Year 1 of 5]: Nsakanda, A. Discovery Grant (\$20,000.00 of a total grant amount of \$100,000.00), Principal Investigator, GOV-Natural Sciences and Engineering Research Council of Canada (NSERC). [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board Member: Advisory Board

2016 – 2018: Aviation Think Tank, Concordia University, Montreal, Canada-Quebec. Invited member of the founding External Advisory Board

Invited Lecture

2022: University of South Africa. Invited Panelist, University of South Africa event on defining climate solutions, October 26, 2022; Pretoria (South Africa).

2019: African Operations Management Conference, Pretoria, South Africa. Invited Workshop Guest Speaker at the second African Operations Management Conference, title:"Writing for Publication", June 4-6, 2019, Pretoria (South Africa).

Member: Committee/Task Force

2016: International Supply Chain Management Symposium, Niagara Falls, Canada-Ontario.

Other Professional Service Activities

2021: Sustainable Development Technology Canada.

2021: Expert Reviewer for Sustainable Development Technology Canada.

2020: Sustainable Development Technology Canada. Expert Reviewer

2010 – 2011: Natural Sciences and Engineering Research Council of Canada (NSERC). External assessor - grant proposals

Reviewer - External Tenure

2021: University of Winnipeg.

2014: University of Ontario Institute of Technology, Oshawa, Canada-Ontario.

2013: Concordia University, Montreal, Canada-Quebec.

Reviewer: Ad Hoc Reviewer for a Journal

2015 – 2016: International Journal of Production Research.

2015 – 2016: European Journal of Operational Research.

2014 – 2015: Journal of the Operational Research Society.

2014: International Journal of Production Economics.

2010: International Journal of Production Research.

Scholarly Work in Progress

Papers Under Review

Niroomand, I. & Nsakanda, A. (2017). "Improving collection flows in a public postal network with contractor's obligations considerations," Revision under 3rd review to *International Journal of Production Economics*.

Working Papers

Nsakanda, A. & Friedrichs, P. (2017). "NavCanada uses a simulation-based model to determining the staffing requirements at its Flight Information Centers."

Diaby, M., Nsakanda, A., & Cao, Y. (2017). "Solving Large-Scale Multiple Traveling Salesman Problems: A Dantzing-Wolfe/Column Generation Approach."

Description: Target journals: Naval Research Logistics, IIE Transactions.

Nsakanda, A. & Diaby, M. (2017). "Network flow-based formulations of the set partitioning problem."

Description: Target journals: Networks, Naval Research Logistics

Diaby, M. & Nsakanda, A. (2017). "Multiple items capacitated lot sizing and outsourcing in a dynamic reverse logistics environment."

Description: Target journals: Networks, IIE Transactions

Diaby, M., Nsakanda, A., & Cruz, J. M. (2017). "Optimal project planning in the presence of delay penalties and crashing-dependent quality level requirements."

Description: Target journals: European Journal of Operational Research, Computers and Operations Research.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	TOMS5302	Operations Management	0.25	17	Main	100%
2024/Winter	BUSI2301	Introduction to Operations Management	0.5	77	Main	100%
2024/Winter	BUSI2301	Introduction to Operations Management	0.5	74	Main	100%
2024/Winter	BUSI2301	Introduction to Operations Management	0.5	78	Main	100%
2024/Winter	TOMS5302	Operations Management	0.25	168	Main	100%
2023/Fall	TOMS5302	Operations Management	0.25	176	Main	100%
2023/Fall	BUSI3305	Logistics and Transportation	0.5	21	Main	100%

2023/Summer	TOMS5302	Operations Management	0.25	82	Main	100%
2023/Winter	TOMS5302	Operations Management	0.25	33	Main	100%
2023/Winter	BUSI2301	Introduction to Operations Management	0.5	90	Main	100%
2023/Winter	TOMS5302	Operations Management	0.25	13	Main	100%
2023/Winter	BUSI2301	Introduction to Operations Management	0.5	89	Main	100%
2022/Fall	BUSI3305	Logistics and Transportation	0.5	12	Main	100%
2020/Fall	BUSI3309	Project Management	0.5	51	Main	100%
2020/Fall	BUSI3309	Project Management	0.5	49	Main	100%
2020/Fall	BUSI3309	Project Management	0.5	50	Main	100%
2020/Fall	BUSI3305	Logistics and Transportation	0.5	13	Main	100%
2020/Winter	BUSI2301	Introduction to Operations Management	0.5	80	Main	100%
2020/Winter	BUSI2301	Introduction to Operations Management	0.5	78	Main	100%
2020/Winter	BUSI6300	Sem in Mgmt of Prod/Oper I	0.33	2	Main	67%
2020/Winter	BUSI5380	Seminar in Management of Productions/Operations I	0.17	1	Main	23%
2019/Fall	BUSI3309	Project Management	0.5	58	Main	100%
2019/Fall	BUSI3305	Logistics and Transportation	0.5	33	Main	100%
2018/Fall	BUSI3309	Project Management	0.5	55	Main	100%
2018/Fall	BUSI3305	Logistics and Transportation	0.5	13	Main	100%
2018/Fall	BUSI3309	Project Management	0.5	61	Main	100%
2018/Fall	BUSI3309	Project Management	0.5	56	Main	100%
2018/Fall	TOMS5301	Modeling Business Decisions	0.25	17	Bogota	100%
2018/Fall	TOMS5302	Operations Management	0.25	17	Bogota	100%
2018/Fall	TOMS5303	Managing Projects	0.25	38	Main	100%
2018/Summer	TOMS5303	Managing Projects	0.25	18	Main	100%
2017/Fall	BUSI3309	Project Management	0.5	59	Main	100%
2017/Fall	BUSI3309	Project Management	0.5	60	Main	100%
2017/Fall	BUSI3309	Project Management	0.5	60	Main	100%
2017/Fall	BUSI3305	Logistics and Transportation	0.5	19	Main	100%
2016/Fall	TOMS5303	Managing Projects	0.25	21	Main	100%
2016/Fall	BUSI3309	Project Management	0.5	65	Main	100%
2016/Fall	BUSI3309	Project Management	0.5	66	Main	100%
2016/Fall	BUSI3305	Logistics and Transportation	0.5	31	Main	100%
2015/Summer	TOMS5303	Managing Projects	0.25	11	Main	100%

Service to the institution (Academic)

University Assignments

PhD. Thesis Committees:

2011-2012: External, Zhanwei Li

External Committees

Thesis Assignments

Masters Thesis Committees:

2023-2024: Abhjeet Bhattacharya

2023-2024: Chenrui Fu

Thesis Assignments

PhD. Thesis Committees:

2017-2018: External, Tariq Aljuneidi

2013-2014: External, Iran Niroomand

Thesis Assignments

PhD. Thesis Committees:

2023-2024: Foad Haji Mohammad

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Sprott School of Business, Carleton University

University Assignments

Other Committees:

2020-2021: Carleton University Grants

H. OTHER

Student Experience Activities

2015 - Supply Chain Management Association Student Case Competition : Ranked amongst the top 3 in the Eastern Canada Competition (the only university from Ontario) to qualify for the national competition (Toronto, February 28th, 2015).

Selected Media Appearances: Online

2018 - Rewarding your shopping loyalty with points. Theconversation.com : Published on December 11, 2018

Student Experience Activities

2015 - Invited judge, Supply Chain Management Association Student Case Competition : Toronto, February 28th, 2015

2017 - Invited Judge, Supply Chain Management Association Student Case Competition : Hamilton, February 25th, 2017, ranked 1st for the national competition.

2018 - Invited Judge - 2018 Supply Chain Management Association Student Case Competition : Hamilton, February 24th, 2018

2019 - Invited Judge, Supply Chain Management Association Student Case Competition : Toronto, February 23rd, 2019

Credentials

Research Reports

2020: Nsakanda, A., Freight innovation in Canada: implications of disruptive technologies. a literature review., submitted to Transport Canada.

Curriculum Vitae - Sprott School of Business

Isaac Otchere, PhD
Full Professor - Tenured, 2008
Sprott School of Business (Finance)
Telephone: 613-520-2600 x2731
Email: isaac.otchere@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-2588-9411>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Tasmania.

Title: *School of Finance & Accounting, University of Tasmania Dissertation Title: Intra-industry Information Transfer Effects Associated with Dividend Initiation Announcements Dissertation Chair (Supervisor): Arthur Moreau, PhD*

Master of Management Studies. Carleton University.

Master of Public Administration. Carleton University.

Bachelor of Science. University of Ghana.

Title: *First Class Honours.*

Professional Certifications

N/A, 1994, Institute of Chartered Accountants (ICA), Ghana.

B. EMPLOYMENT

Academic Appointments

Full Professor, Sprott School of Business, Carleton University (July, 2012 - Present), Ottawa, Canada-Ontario.

Visiting Scholar, Kwame Nkrumah University of Science and Technology (KNUST) Business School (2011 - Present), Kumasi, Ghana.

Visiting Scholar, Ghana Institute of Management and Public Administration (GIMPA) Business School (2007 - Present), Accra, Ghana.

Visiting Scholar, University of Cape Town (UCT) Graduate School of Business (2011 - 2015), Cape Town, South Africa.

Associate Professor, Sprott School of Business, Carleton University (June, 2006 - June, 2012), Ottawa, Canada-Ontario. Tenured

Associate Professor, Faculty of Business Administration, University of New Brunswick (2003 - 2006), Fredericton, Canada-New Brunswick. Tenured

Visiting Professor, School of Business and Economics, Wilfrid Laurier University (January, 2003 - June, 2003), Waterloo, Canada-Ontario.

Assistant Professor, Department of Finance, University of Melbourne (1998 - 2003), Melbourne, Australia. Tenured

Other Employment

Teaching Assistant, School of Finance & Accounting, University of Tasmania (1995 - 1998), N/A, Australia.

Business Analyst, Mead Johnson Canada (1994 - 1995), Ottawa, Canada-Ontario.

Teaching Assistant, Sprott School of Business, Carleton University (1992 - 1994), Ottawa, Canada-Ontario.

Teaching Assistant, School of Business Administration, University of Ghana (1989 - 1990), Accra, Ghana.

Financial Analyst, Prime Management Consultants (1989 - 1990), Accra, Ghana.

Accounting Assistant, Darko & Co Ltd. (1983 - 1985), Kumasi, Ghana.

C. PROFESSIONAL HONOURS

2023: Nomination Committee for Nobel Prize in Economics, Nobel Committee.

2022: Nomination Committee for Nobel Prize in Economics, Nobel Committee.

2022: Carleton University Teaching Achievement Award, Carleton University.

2021: Research Achievement Award, Carleton University.

2019: Nomination Committee for Nobel Prize in Economics, Nobel Committee. Appointed by the Nobel Committee to the 2020 Nomination Committee for Nobel Prize in Economics.

2018: Teaching Excellence Award, Sprott School of Business.

2017: Royal Society of Canada Award, Royal Society of Canada.

2017: CFA Toronto Society Canadian Investment Research Award, CFA Toronto.

2015: CUSA Teaching Excellence Award, Carleton University Students Association.

2014: Best Paper Award, Securities and Financial Markets (SFM) Conference. "Merging Corporatized Financial Markets", Taiwan.

2014: Carnegie African Diaspora Fellow, Institute of International Education.

2013: CUSA Teaching Excellence Award, Carleton University Students Association.

2013: Best paper Award, Global Accounting, Finance & Economics Conference. "Venture capitalist participation and the performance of Chinese IPOs" 3rd Global Accounting, Finance & Economics Conference, Melbourne, Australia.

2013: Graduate Mentoring Award, Faculty of Graduate Studies, Carleton University.

2012: Provost Fellowship in Teaching Award, Carleton University.

2010: CUSA Teaching Excellence Award, Carleton University Students Association.

2010: Teaching Achievement Award, Carleton University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	10		11
Articles-in-Progress (All)		6		6
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings		1		1
Paper Presentations (Refereed)	1	8		9
Grants - Funded (both refereed and non-refereed)	7	7		14
Totals	9	32		41

Refereed Scholarly Publications

Articles in Refereed Journals

Ofori-Sasu, D., Yindenaba Abor, J., Otchere, I., Nana, G., Donkor, A., Isaac Otchere (2023). Renewable energy consumption and carbon emissions in developing countries: the role of capital markets. *International Journal of Sustainable Energy*, 42 (1), 1407-1429. [B,Other]

Mohsni, S., Otchere, I., & Shahriar, S. (2022). Board gender diversity, firm performance and risktaking in developing countries: the moderating role of culture. *Journal of International Financial Markets, Institutions and Money*, 73, 101360. [A]

Note from Isaac: This article was not considered in 2021 because i was waiting for page number to be assigned

Mohsni, S., Otchere, I., & Yamada, K. (2022). Passive trading and firm performance: A quasi-natural experiment using the TSE-OSE merger in Japan. *Pacific Basin Finance Journal*, 70, 101666. [A]

Note from Isaac: This article was not considered in 2021 because i was waiting for page number to be assigned

Dang, V., Otchere, I., & So, E. (2022). Does the Nature of Political Connection Matter for Corporate Social Responsibility Engagement? Evidence from China,. *Emerging Markets Review*, 52, 100907. [A]

Oldford, E., & Otchere, I. (2021). Institutional cross-ownership, heterogeneous incentives, and negative premium mergers. *Review of Quantitative Finance and Accounting*, 57, 321-351. [B]

2022 Update: Published; Forthcoming

Dang, V. Q., Otchere, I., So, E. P., & Yan, I. K.M. (2021). Not All Shadow Banking is Bad! Evidence from Credit Intermediation of Non-Financial Chinese Firms. *Review of Quantitative Finance and Accounting*, 57, 1437–1462. [B]

Otchere, I., & Abukari, K. (2020). Are super stock exchange mergers motivated by efficiency or market power gains? *Journal of International Financial Markets, Institutions and Money*, 64, 1-15. [A]

Available online 23 December 2019, 101164 In Press, Corrected Proof

Otchere, I., Senbet, L., & Zhu, P. (2020). Does political connection distort competition and encourage corporate risk taking? *Journal of Empirical Finance*, 55, 21-42. [A]

Kobana, A., & Otchere, I. (2020). Has stock exchange demutualization improved market quality? International Evidence. *Review of Quantitative Finance and Accounting*, 55, 901-934. [B]

First Online: 09 December 2019 Forthcoming

Abukari, K., & Otchere, I. (2020). Dominance of Hybrid Contratum Strategies over Momentum and Contrarian Strategies: Half a Century of Evidence. *Financial Markets and Portfolio Management*, 34, 471-505. [B]

Jog, V., Otchere, I., & Sun, C. (2019). Does the Two-Stage IPO process reduce underpricing and long run underperformance? Evidence from Chinese firms listed in the U.S. *Journal of International Financial Markets, Institutions and Money*, 59, 90-105. [A]

Forthcoming

Mohsni, S., & Otchere, I. (2018). Does regulatory regime matter for bank risk taking? A comparative analysis of US and Canada. *Journal of International Financial Markets, Institutions and Money*, 53, 1-16. [A]

Available online 1 September 2017

Otchere, I., & Oldford, E. (2018). Cross-border acquisitions and host country competitiveness. *Journal of Business Finance and Accounting*, 45 (9-10), 1260-1292. [A+]

Otchere, I., Senbet, L. W., & Simbanegavi, W. (2017). Financial sector development in Africa—an overview. *Review of Development Finance*, 7 (1), 1-5. [B]

Oldford, E., & Otchere, I. (2016). Are Cross-border Acquisitions Enemy of Labor in Canada? An Examination of Employment and Productivity Effects. *Pacific Basin Finance Journal*, 40, 438-455. [A]

Mohsni, S., & Otchere, I. (2016). Changing Organizational Form in the Stock Exchange Industry and Risk Taking. *Financial Markets and Portfolio Management*, 30, 427-451. [B]

Otchere, I., & Vong, A. (2016). Venture capitalist participation and the performance of Chinese IPOs. *Emerging Markets Review*, 29, 226-245. [A]

Abukari, K., & Otchere, I. (2016). Merging Corporatized Financial Markets. *Journal of Financial Studies*, 24 (3), 1-43.

Otchere, I., Soumaré, I., & Yourougou, P. (2015). FDI and Financial Market Development in Africa. *World Economy*, 39 (5), 651-678. [A]

Mohsni, S., & Otchere, I. (2015). Financial Crisis, Liquidity Infusion and Risk-Taking: The Case of Canadian Banks. *Journal of Banking Regulation*, 16 (2), 146-167. [B]

Contribution: 50 percent.

Mohsni, S., & Otchere, I. (2014). Risk Taking Behavior of Privatized Banks. *Journal of Corporate Finance*, 29, 122-142. [A+]

Contribution: 50 percent.

Jog, V., Otchere, I., & Zhu, P. (2014). Idiosyncratic Volatility and Mergers and Acquisitions in Emerging Markets. *Emerging Markets Review*, 19, 18-48. [A]

Issue C.

Otchere, I., Owusu-Antwi, G., & Mohsni, S. (2013). Why are Stock Exchange IPOs So Underpriced and yet Outperform in the Long Run? *Journal of International Financial Markets, Institutions and Money*, 27, 76-98. [A]

Contribution: 30 percent.

Aboagye, A. Q., & Otchere, I. (2012). How Have Consumers Fared in Bank Privatization? International Evidence. *International Journal of Financial Research*, 4, 29-45.

Oldford, E., & Otchere, I. (2011). Can Commercialization Improve the Performance of Stock Exchanges Even without Corporatization? *Financial Review*, 46, 67-87. [A]

Zhu, P., Jog, V., & Otchere, I. (2011). Partial Acquisition in Emerging Markets: A test of the Strategic Market entry and corporate Control Hypotheses. *Journal of Corporate Finance*, 17 (2), 288-305. [A+]

Allen, F., Otchere, I., & Senbet, L. (2011). African Financial System: A Review. *Review of Development Finance*, 1, 79-113. [B]

Gygax, A., & Otchere, I. (2010). Index Composition Changes and the Cost of Incumbency. *Journal of Banking and Finance*, 34, 2500-2509. [A+]

Chapters in Edited Books

Amoah, L., Adjasi, C., Soumare, I., Osei, K., Abor, J., Bugri, E., Amo-Yarte, C., and Otchere, I., (2020). Contemporary Issues in Development Finance. *Finance, Economic Growth, and Development*. Routledge. [Status: Published]

Otchere, I., & Senbet, L.W (2010). African Stock Markets, Opportunities and Issues. In Marc Quintyn and Genevieve Verdier (Eds.), *African Finance in the 21st Century* (pp. 104-142). Palgrave Macmillan. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Publications

Other Publications

2018: Mohsni, S., & Otchere, I., *Have you ever wondered why banking crises happens in America but not in Canada*. This is a shortened version and a summary of one of a co-authored paper published in the Journal of Banking Regulation

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Academic PRJ

2014 – 2015: Journal of African Business (Regional).

Editor: Associate Editor

2022: Afro Asian Journal of Finance and Accounting (International).

2020 – 2022: African Finance Journal (International).

Editor: Special Issue of a PRJ

Presentations

Papers Presented at Conferences

Refereed

- Otchere, I. (2023). *Sustainable Investing, Exclusionary Policies and Sustainability of Pension Assets: Evidence from OECD Countries*. Global Finance Conference, Treviso, Italy.
- Otchere, I. (2023). *FinTech and Financial System Stability in South Africa*. Innovation, Inclusion, and Regulation, African Accounting and Finance Conference, Accra, South Africa.
- Otchere, I. (2023). *Value Effects of Sovereign Wealth Funds' Sustainable Investing and Exclusionary Policies: The Case of the Norwegian Government Pension Fund-Global*. Cross Country Perspectives in Finance Conference, Virtual, Virtual.
- Otchere, I. (2023). *FinTech and Financial System Stability in South Africa*. Innovation, Inclusion, and Regulation, Ahmedabad, India.
- Otchere, I. (2022). *Sustainable Investing and Sustainability of Pension Assets: Evidence from the OECD*. Sustainability, Climate Change and Financial Innovation Conference, Dubai, United Arab Emirates.
- Otchere, I. (2022). *FinTech and Financial System Stability in South Africa*. Paris Financial Management Conference, Paris, France.
- Otchere, I. (2020). *Not All Shadow Banking is Bad! Evidence from Credit Intermediation of Non-Financial Chinese Firms*. Conference on Cross Country Perspective, Virtual, Virtual.
- Otchere, I. (2019). *Board gender diversity, firm performance and risk taking in developing countries: The moderating role of culture*. Conference on Cross Country Perspective, Jinan, China.
- Otchere, I. (2019). *Passive Trading and Performance: A Quasi Natural Experiment using the Stock Exchange Merger in Japan*. Asia Finance Association Conference, Ho Chi Minh City, Viet Nam.
- Otchere, I. (2018). *Has stock exchange demutualization improved market quality?* Securities and Financial Markets Conference, Kaohsiung, Taiwan.
- Otchere, I. (2018). *Are Super Stock Exchange Mergers Motivated by Efficiency or Market Power Gains?* Conference on Cross Country Perspective, Guangzhou, China.
- Otchere, I. (2018). *Has stock exchange demutualization improved market quality?* Eastern Finance Association Conference, Philadelphia, United States of America.
- Mohsni, S., Otchere, I., & Yamada, K. (2018, July). *Passive Trading and Performance: A Quasi Natural Experiment using the Stock Exchange Merger in Japan*. World Finance Conference, Port Louis, Mauritius.
- Mohsni, S. & Otchere, I. (2017). *Does regulatory regime matter for bank risk taking? A comparative analysis of US and Canada*. Conference of the Multinational Finance Society, Limassol, Cyprus.
- Description: March 2017
- Mohsni, S. & Otchere, I. (2017). *Does regulatory regime matter for bank risk taking? A comparative analysis of US and Canada*. Cross Country Perspectives in Finance Conference, Pu'er, China.
- Otchere, I. (2017). *Does the Two-Stage IPO process reduce underpricing and long run underperformance? Evidence from Chinese firms listed in the U.S.,* Journal of International Financial Markets, Institutions & Money Conference, Chengdu, China.
- Abukari, K. & Otchere, I. (2016). *Has Stock Exchange Demutualization Improved Market Quality?* Northern Finance Association (NFA) Conference, Mont Tremblant, Canada-Quebec.
- Otchere, I. (2016). *Does regulatory regime matter for bank risk taking? A comparative analysis of US and Canada*. Journal of International Financial Markets, Institutions & Money Conference, Taiyuan, China.
- Otchere, I. (2016). *Changing Organizational Form in the Stock Exchange Industry and Risk Taking*. Annual Conference of the Swiss Society for Financial Market Research (SGF), Zurich, Switzerland.
- Otchere, I. (2016). *Does political connection distort competition and encourage corporate risk taking?* Securities and Financial Markets conference, Kaohsiung, Taiwan.
- Otchere, I. (2016). *Has stock exchange demutualization improved market quality?* Northern Finance Association (NFA) Conference, Quebec, Canada.
- Description: **Mont-Tremblant**
- Mohsni, S. & Otchere, I. (2015). *Changing Organizational Form in the Stock Exchange Industry and Risk Taking*. Global Finance Conference, Hangzhou, China.
- Description: April 2015
- Mohsni, S. & Otchere, I. (2015). *Changing organizational form in the stock exchange industry and risk taking*. International Banking and Finance Society (IFABS) Conference, Hangzhou, China.
- Description: June 2015
- Otchere, I. & Oldford, E. (2015). *Are cross-border acquisitions enemy of labor? An examination of employment and productivity effects in Canada*.

Global Finance Conference, Hangzhou, China.

Otchere, I. (2015). *Are Cross-border Acquisitions Enemy of Labor in Canada? An Examination of Employment and Productivity Effects*. Corporate Governance and Financial Markets Conference, Perth, Australia.

Otchere, I. (2015, April). *Changing organizational form in the stock exchange industry and risk taking*. World Finance Conference, Hangzhou, China.
Description: Global Finance Conference

Otchere, I. (2014). *Merging Corporatized Financial Markets*. Securities and Financial Markets Conference, Kaohsiung, Taiwan.
Description: Best paper Award.

Otchere, I. (2014). *Merging Corporatized Financial Markets*. Global Finance Conference, Dubai, United Arab Emirates.
Description: March-April.

Abukari, K. & Otchere, Isaac. (2014, December). *Merging Corporatized Financial Markets*. Theories and Practices of Securities and Financial Markets (SFM) Conference, Kaohsiung, Taiwan.
Description: Online. Paper won the JFS Best Paper Award.

Mohsni, S. & Otchere, I. (2013). *Financial crisis, non-disclosure of government financial assistance and risk-taking: The case of Canadian Banks*. Financial Management Association (FMA) Conference, Chicago, Illinois.
Description: October 2013

Otchere, I. (2013). *Financial Crisis, Non-disclosure of Government Financial Assistance and Risk-Taking: The Case of Canadian Banks*. Banking, Finance, Money & Institutions: The Post Crisis Era, Surrey, United Kingdom.

Otchere, I. (2013). *Venture capitalist participation and the performance of Chinese IPOs*. Accounting and Finance Conference, Melbourne, Australia.
Description: Best paper Award.

Mohsni, S. & Otchere, I. (2012). *Risk-taking behavior of newly-privatized banks*. World Finance Conference, Shanghai, China.

Otchere, I. (2012). *Venture capitalist participation and the performance of Chinese IPOs*. World Finance Conference, Shanghai, China.
Description: World Finance and Banking Conference.

Mohsni, S. & Otchere, I. (2012). *Risk-taking behavior of newly-privatized banks*. Northern Finance Association (NFA) Conference, Niagara Falls, Canada-Ontario.
Description: September 2012

Otchere, I. (2011). *Risk taking behavior of privatized banks*. Securities and Financial Markets Conference, Unknown, Taiwan.

Otchere, I., Mohsni, S., & Owusu-Antwi, G. (2010). *Why are stock exchange IPOs so underpriced and yet outperform in the long run? A test of the signaling hypothesis*. Conference on Theories and Practices of Securities and Financial Markets, Taipei, Taiwan.

Otchere, I. (2010). *Why are stock exchange IPOs so underpriced and yet outperform in the long run? A test of the signaling hypothesis*. Financial Management Association (FMA) Conference, New York, New York.

Otchere, I. (2010). *Can corporatization improve the performance of stock exchanges even without self listing?* Eastern Finance Association (EFA), Miami Beach, Florida.

Other Presentations

Invited Lecture

2016: Laval University, Quebec City, Canada-Quebec. Does political connection distort competition and encourage corporate risk taking

Presentation

2023: Asper School of Business, Winnipeg, Canada-Manitoba. Sustainable Investing and Sustainability of Pension Assets: Evidence from OECD Countries. Presented at the Asper School of Business, University of Manitoba, Winnipeg, 10 April 2023.

2023: Leeds University Business School, Leeds, England. The Price of Environmental Sin: The Case of NGPF-G Exclusions, Presented at Leeds University Business School, University of Leeds, 10 August 2023

2020: Conference on Cross Country Perspective, Virtual, Virtual. Not All Shadow Banking is Bad! Evidence from Credit Intermediation of Non-Financial Chinese Firms

2016: African Economic Research Consortium (AERC), Nairobi, Kenya. Financial Inclusion and Development in Africa: Gaps, Challenges and Policy Recommendations

2016: International Development Research Centre (IDRC), Ottawa, Canada-Ontario. Roundtable discussion on 'Expanding Financial Inclusion to Enhance Livelihoods'

Contract or Other Research

Research Grants and Awards

Grants

2026 [Year 5 of 5]: Otchere, I. Insight Development Grant (\$12,113.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2026 [Year 4 of 4]: Otchere, I. Insight Grant, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not

Funded]

2025 [Year 5 of 5]: Otchere, I. Insight Development Grant (\$12,113.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2025 [Year 3 of 4]: Otchere, I. Insight Grant, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2025 [Year 4 of 4]: Otchere, I. Partnership Engage Grant (\$6,243.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 4 of 5]: Otchere, I. Insight Development Grant (\$12,113.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 2 of 4]: Otchere, I. Insight Grant, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2024 [Year 3 of 4]: Otchere, I. Partnership Engage Grant (\$6,243.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 2 of 2]: Otchere, I. Development Grant - SSHRC Explore (\$5,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2023 [Year 3 of 5]: Otchere, I. Insight Development Grant (\$12,113.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 4]: Otchere, I. Insight Grant, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 2 of 4]: Otchere, I. Partnership Engage Grant (\$6,243.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 2]: Otchere, I. Development Grant - SSHRC Explore (\$5,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2022 [Year 2 of 5]: Otchere, I. Insight Development Grant (\$12,113.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 4]: Otchere, I. Partnership Engage Grant (\$6,243.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 4 of 4]: Otchere, I. & Duxbury, L., Insight Grant (\$35,192.00 of a total grant amount of \$140,766.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021: Otchere, I. International Research Seed Grant (\$10,000.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2021 [Year 1 of 5]: Otchere, I. Insight Development Grant (\$12,113.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020 [Year 3 of 4]: Otchere, I. Insight Grant (\$35,192.00 of a total grant amount of \$140,766.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020: Otchere, I. & Mohsni, S., Partnership Engage Grant (\$24,868.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020: Otchere, I. Partnership Engage Grant (\$4,000.00), Principal Investigator, Insurance Bureau of Canada. [Status: Funded]

2020: Otchere, I. International Research Seed Grant (\$10,000.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2020: Otchere, I. COVID Supplement (\$5,853.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020: Otchere, I. COVID Supplement (\$3,948.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019 [Year 2 of 4]: Otchere, I. Insight Grant (\$35,192.00 of a total grant amount of \$140,766.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 3 of 3]: Otchere, I. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 1 of 4]: Otchere, I. & Duxbury, L., Insight Grant (\$35,192.00 of a total grant amount of \$140,766.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018: Otchere, I. Development Grant (\$9,929.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2018: Otchere, I. Sabbatical Research Grant (\$20,000.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

2017 [Year 2 of 3]: Otchere, I. Insight Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2016 [Year 1 of 3]: Otchere, I. Insight Grant (\$31,178.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016: Otchere, I. Development Grant (\$9,816.00 Not Funded), Principal Investigator, Carleton University, CORIS. [Status: Not Funded]

2015: Otchere, I. Research Achievement Award (\$15,000.00 Not Funded), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Not Funded]

2013: Otchere, I. SSHRC SIG Sub-Grant, Grantee, Carleton University, CORIS. [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board Member: PRJ Editorial Review Board

2016 – 2022: Journal of International Business Studies.

Invited Lecture

2016: Laval University, Quebec City, Canada-Quebec. Does political connection distort competition and encourage corporate risk taking

Member: Committee/Task Force

2020 – 2021: Nobel Committee. Appointed by the Nobel Committee to the 2020 Nomination Committee for Nobel Prize in Economics

Other Professional Service Activities

2016: Social Sciences and Humanities Research Council (SSHRC). Reviewer of Social Science and Humanities Research Council (SSHRC) Grant

2014 – 2016: African Economic Research Consortium (AERC), Nairobi, Kenya. Resource person

2013: Social Sciences and Humanities Research Council (SSHRC), Ottawa, Canada-Ontario. SSHRC Adjudication committee -2013-14 competition

2011: Social Sciences and Humanities Research Council (SSHRC). Reviewer of Social Science and Humanities Research Council (SSHRC) Grant

Reviewer - External Tenure

2023: University of Qatar, Qatar, Qatar. External reviewer of promotion application

2023: GIMPA, Ghana, Ghana. External reviewer of promotion application

2022: University of Manitoba.

2016: Wilfrid Laurier University Waterloo, Canada, Waterloo, Canada-Ontario. External reviewer of promotion application

2015: University of Lethbridge, Canada, Lethbridge, Canada-Alberta. External reviewer of promotion application

2015: University of Macau, Macau, China - Macau. External reviewer of promotion application

2013: University of Saskatchewan, Saskatoon, Canada-Saskatchewan. External reviewer of promotion application

Reviewer: Ad Hoc Reviewer for a Journal

2023: Journal of Financial Stability.

2022 – 2023: Sustainability Accounting, Management and Policy Journal.

2019 – 2022: Journal of International Business Studies.

2019 – 2022: Journal of International Financial Markets, Institutions & Money.

2019 – 2020: Pacific Basin Finance Journal.

2019 – 2020: Journal of Corporate Finance.

2019: International Review of Financial Analysis.

2019: European Journal of Development Research.

2019: Abacus.

2019: Quarterly Review of Economics and Finance.

2018: Finance Research Letters.

2017: Journal of African Economies.

2017: Competition and Change.

2017: Journal of Organizational Change Management.

2016: Emerging Markets Finance and Trade.

2016: Review of Development Finance.

2016: International Review of Economics and Finance.

2016: Asian Journal of Economics.

2015 – 2016: Transnational Corporation Review.

2015: African Finance Journal.

2014 – 2015: Journal of Banking and Finance.

2014: International Review of Financial Analysis.

2014: Emerging Markets Finance and Trade.

2014: African Development Review Journal.

2014: European Journal of Finance.

2013: African Journal of Business Management.

2013: Accounting Research Journal.

2013: Journal of International Financial Markets, Institutions & Money.

2012: Journal of Public Administration.

2011: Accounting and Finance.

2011: Pacific Basin Finance Journal.

2011: Management and Organization.

2011: Managerial Finance.

2011: Economics of Governance.

2010 – 2011: Journal of Banking and Finance.

2010: Financial Review.

2010: African Finance Journal.

2010: Thunderbird International Review.

2010: European Financial Management.

Scholarly Work in Progress

Papers Under Review

Otchere, I., Abdulrahman, A., & Wang, J. (2023). "Sustainable Investing and Sustainability of Pension Funds' Assets: Evidence from OECD," Revised and resubmitted.

Mohsni, S., Otchere, I., & Kazuo, Y. (2020). "Passive Trading and Performance: A Quasi Natural Experiment using the Stock Exchange Merger in Japan," 1st revise and resubmit to *Pacific Basin Finance Journal*.

Otchere, I. & Abukari, K. (2017). "Dominance of Hybrid Contratum Strategies over Momentum and Contrarian Strategies: Half a Century of Evidence," Initial submission.
Description: This paper won the 2017 CFA Society Toronto-Hillsdale Canadian Investment Research Award.

Otchere, I. & Olford, E. (2017). "Cross border acquisitions and the competitiveness of host country firms," Initial submission.

Otchere, I., Senbet, L., & Zhu, P. (2017). "Does political connection distort competition and encourage corporate risk taking," Initial submission.

Working Papers

Otchere, I. & Guo, S. (2023). "Political Connections Around the World: Evidence from Survey Data."

Mohsni, S., Otchere, I., & Yinlin, Z. (2023). "Corporate Restructuring and Innovation: The case of Spinoffs."

Mohsni, S., Otchere, I., & Firoozi, M. (2022). "Board Gender Diversity Policy and Firm Governance, Performance and Risk-Taking: the Case of Canada."

Mohsni, S., Otchere, I., & Zhang, Y. (2019). "Innovation and Spinoffs."

Otchere, I. (2017). "Financial Inclusion and Development in Africa: Gaps, Challenges and Policy Recommendations.."
Description: Being prepared for submission

Otchere, I. & Abukari, K. (2017). "Has stock exchange demutualization improved market quality?."
Description: Being prepared for submission

Mohsni, S., Lambe, B., & Otchere, I. (2017). "Female CEOs and risk taking behavior: A comparative Analysis between the US and Europe."
Description: Work in Progress

Mohsni, S., Otchere, I., & Yamada, K. (2017). "Passive Trading and Performance: A Quasi Natural Experiment using the Stock Exchange Merger in Japan."
Description: Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	FINA5513	Mergers and Acquisitions	0.25	14	Main	100%

2024/Winter	FINA5512	Valuation	0.25	21	Main	100%
2024/Winter	FINA5501	Financial Management	0.25	156	Main	100%
2024/Winter	BUSI2503	Basic Financial Management	0.5	115	Main	100%
2024/Winter	FINA5528	Equity Analysis 1	0.25	15	Main	100%
2023/Fall	FINA5501	Financial Management	0.25	17	Main	100%
2023/Fall	BUSI4510	Mergers and Acquisitions	0.5	23	Main	100%
2023/Fall	FINA5501	Financial Management	0.25	195	Main	100%
2023/Fall	FINA5512	Valuation	0.25	12	Main	100%
2023/Fall	FINA5512	Valuation	0.25	24	Main	100%
2023/Fall	FINA5513	Mergers and Acquisitions	0.25	12	Main	100%
2023/Fall	FINA5513	Mergers and Acquisitions	0.25	11	Main	100%
2023/Fall	BUSI2503	Basic Financial Management	0.5	135	Main	100%
2023/Summer	FINA5512	Valuation	0.25	15	Main	100%
2023/Summer	FINA5501	Financial Management	0.25	131	Main	100%
2023/Summer	ACCT5130	Advanced Finance	0.5	18	Main	100%
2023/Winter	FINA5501	Financial Management	0.25	25	Main	100%
2023/Winter	FINA5501	Financial Management	0.25	5	Main	100%
2022/Fall	FINA5512	Valuation	0.25	15	Main	100%
2022/Fall	FINA5501	Financial Management	0.25	10	Main	100%
2022/Fall	BUSI4510	Mergers and Acquisitions	0.5	19	Main	100%
2022/Fall	FINA5501	Financial Management	0.25	27	Main	100%
2022/Fall	FINA5501	Financial Management	0.25	35	Main	100%
2022/Fall	FINA5513	Mergers and Acquisitions	0.25	15	Main	100%
2022/Fall	FINA5501	Financial Management	0.25	17	Main	100%
2022/Summer	ACCT5130	Advanced Finance	0.5	15	Main	100%
2022/Winter	FINA5501	Financial Management	0.25	17	Main	100%
2021/Fall	BUSI4510	Mergers and Acquisitions	0.5	20	Main	100%
2021/Fall	FINA5513	Mergers and Acquisitions	0.25	9	Main	100%
2021/Fall	FINA5512	Valuation	0.25	13	Main	100%
2021/Fall	FINA5501	Financial Management	0.25	29	Main	100%
2021/Fall	FINA5501	Financial Management	0.25	26	Main	100%
2021/Summer	ACCT5130	Advanced Finance	0.5	17	Main	100%
2021/Winter	FINA5501	Financial Management	0.25	14	Main	100%
2021/Winter	FINA5501	Financial Management	0.25	25	Main	100%
2020/Fall	FINA5513	Mergers and Acquisitions	0.25	30	Main	100%
2020/Fall	FINA5512	Valuation	0.25	32	Main	100%
2020/Fall	FINA5501	Financial Management	0.25	21	Main	100%

2020/Fall	BUSI4510	Mergers and Acquisitions	0.5	25	Main	100%
2019/Fall	FINA5501	Financial Management	0.25	30	Main	100%
2019/Fall	FINA5513	Mergers and Acquisitions	0.25	19	Main	100%
2019/Fall	BUSI4510	Mergers and Acquisitions	0.5	40	Main	100%
2019/Fall	FINA5501	Financial Management	0.25	25	Main	100%
2019/Fall	FINA5501	Financial Management	0.25	24	Main	100%
2019/Summer	FINA5513	Mergers and Acquisitions	0.25	18	Bogota	100%
2019/Winter	FINA5512	Valuation	0.25	26	Main	100%
2019/Winter	BUSI2503	Basic Financial Management	0.5	102	Main	100%
2018/Fall	BUSI4510	Mergers and Acquisitions	0.5	28	Main	100%
2018/Fall	BUSI2503	Basic Financial Management	0.5	122	Main	100%
2018/Fall	FINA5501	Financial Management	0.25	30	Main	100%
2018/Fall	FINA5501	Financial Management	0.25	30	Main	100%
2018/Fall	FINA5513	Mergers and Acquisitions	0.25	23	Main	100%
2018/Summer	FINA5513	Mergers and Acquisitions	0.25	23	Shanghai	100%
2017/Fall	FINA5514	Micro Finance	0.25	41	Shanghai	100%
2017/Summer	FINA5513	Mergers and Acquisitions	0.25	8	Bogota	100%
2017/Winter	BUSI2503	Basic Financial Management	0.5	130	Main	100%
2017/Winter	FINA5512	Valuation	0.25	27	Main	100%
2016/Fall	BUSI2503	Basic Financial Management	0.5	89	Main	100%
2016/Fall	BUSI3500	Applied Corporate Finance	0.5	41	Main	100%
2016/Fall	BUSI3500	Applied Corporate Finance	0.5	37	Main	100%
2016/Fall	BUSI4510	Mergers and Acquisitions	0.5	36	Main	100%
2016/Fall	FINA5514	Micro Finance	0.25	28	Bogota	100%
2016/Fall	FINA5501	Financial Management	0.25	34	Main	100%
2016/Fall	FINA5501	Financial Management	0.25	28	Main	100%
2016/Summer	ACCT5130	Advanced Finance	0.5	6	Main	100%
2016/Summer	FINA5512	Valuation	0.25	31	Shanghai	100%
2016/Summer	FINA5513	Mergers and Acquisitions	0.25	21	Bogota	100%
2016/Winter	FINA5512	Valuation	0.25	23	Main	100%
2015/Fall	BUSI2505	Business Finance	0.5	73	Main	100%
2015/Fall	BUSI3500	Applied Corporate Finance	0.44	37	Main	88%
2015/Fall	BUSI3500	Applied Corporate Finance	0.5	34	Main	100%
2015/Fall	BUSI4510	Mergers and Acquisitions	0.5	28	Main	100%
2015/Fall	BUSI6500	Seminar in Finance I	0.25	6	Main	50%
2015/Fall	FINA5501	Financial Management	0.25	18	Main	100%
2015/Fall	BUSI3500	Applied Corporate Finance	0.06	5	Main	12%

2015/Fall	FINA5501	Financial Management	0.25	38	Main	100%
2015/Summer	BUSI2505	Business Finance	0.05	4	Main	11%
2015/Summer	ACCT5130	Advanced Finance	0.5	30	Main	100%
2015/Summer	FINA5513	Mergers and Acquisitions	0.25	23	Bogota	100%
2015/Summer	BUSI2505	Business Finance	0.45	33	Main	89%

Service to the institution (Academic)

External Committees

Thesis Assignments

Masters Thesis Committees:

2023-2024: Meng Yang

Thesis Assignments

PhD. Comprehensive Committees:

2022-2023: University of Ghana, Korkor Ngozi Nartey

PhD. Thesis Committees:

2023-2024: Adam Baba Mohammed

Thesis Assignments

PhD. Thesis Committees:

2021-2022: Matthew Ntow-Gyamfi, University of Ghana

2020-2021: University of Ghana Business School

2020-2021: University of Dubai

Thesis Assignments

PhD. Thesis Committees:

2022-2023: University of Ghana, Dennis Venunye-Hehetror

2022-2023: University of Manitoba, Yuan Wang

Thesis Assignments

PhD. Thesis Committees:

2020-2021: University of Ottawa – PhD Thesis proposal examination

Thesis Assignments

PhD. Thesis Committees:

2022-2023: University of Ottawa, Nicolas Legendre

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2016-2017: Hiring Committee - Finance Faculty

2015-2016: Departmental Tenure and Promotion Committee (Cluster II)

Sprott School of Business, Carleton University

University Assignments

Other Committees:

2020-2021: Faculty of Public Affairs Management Board

2020-2021: Carleton Development Research Awards Committee

2020-2021: School of Journalism, Carleton University

H. OTHER

Selected Media Appearances: Online

2018 - Featured post Why financial crises occur in America but not Canada? : The featured article is based on 2018 publication 'Does Regulatory Regime Matter for Bank Risk Taking? A Comparative Analysis of US and Canada, Journal of International Financial Markets, Institutions & Money 53, 1-16 (2018).

Credentials

Research Reports

2015: Mohsni, S., & Otchere, I., Risk taking behavior of privatized banks., submitted to Privatization Barometer.

Curriculum Vitae - Sprott School of Business

Shani Pupco, MSc
Lecturer, Teaching Stream - Preliminary - Tenure Track
Sprott School of Business (Management and Strategy)
Telephone:
Email: Shani.Pupco@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Master of Science. Smith School of Business, Queen's University.

B. EMPLOYMENT

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Refereed Scholarly Publications

Articles in Refereed Conference Proceedings

Abstract Only

Somerville, K., & Pupco, S. (2024). The end in sight: The impact of contract end-type on leader perceptions of contract workers. *Academy of Management (AOM)*, 2024 (1), Briarcliff Manor, NY:.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Reviewer: Ad Hoc Reviewer for a Journal

2024: Academy of Marketing Conference. Academy of Management Conference: OB Division Reviewer

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Curriculum Vitae - Sprott School of Business

Alejandro Ramirez, PhD
Associate Professor - Tenured, 2002
Sprott School of Business (Information Technology/Information Systems)
Telephone: 613-520-2600 x2397
Email: alex.ramirez@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
Orcid: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Concordia University.

Title: *Assessing the Cognitive Fit of Hypertext-Based Learning Aids for Advanced Learning in Complex and Ill-Structured Domains*

Master of Science. Syracuse University.

Bachelor of Science. Instituto Tecnológico y de Estudios Superiores de Monterrey.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (2011 - Present), Ottawa, Canada-Ontario. Information Systems

Assistant Professor, Sprott School of Business, Carleton University (July, 1998 - June, 2011), Ottawa, Canada-Ontario. Information Systems, Tenured 2002

Other Employment

Partner and Product Development Director, Multimediators (September, 1995 - June, 1998), Montreal, Canada-Quebec. Developed a Hypermedia-based Training Program: Super Driver in New York: a training CD-ROM for the theory part of driving instruction for the State of New York

Business Analyst, Bois Laurier Inc. (April, 1994 - November, 1994), Montreal, Canada-Quebec. Analysis and Design of a Transaction Processing System

Academic Director, Instituto Tecnológico y de Estudios Superiores de Monterrey (ITESM) (August, 1988 - July, 1990), Monterrey, Mexico. Responsible for curriculum development and quality of all faculty and administrative employees of the central zone (8 campuses)- Generating training and development programs, setting standards and contacting instructors in different universities within Mexico and Internationally for those programs (ITESM is the largest private university in Mexico. Comprised of 27 campuses-3 zones. Enrolment: over 30,000 students).

General Director, Instituto Tecnológico y de Estudios Superiores de Monterrey (ITESM) Campus Irapuato (January, 1986 - July, 1988), NA, Mexico. ITESM Campus Irapuato President-Academic Senate; Member-Board of Trustees for the Campus; Responsible for the campus in general; University Representative to the community and Government leaders of Irapuato; Employees: 63 full time & 40 part time

Undergraduate Programs Director, Instituto Tecnológico y de Estudios Superiores de Monterrey (ITESM) Campus León (January, 1985 - December, 1985), N/A, Mexico. ITESM Campus León In addition to teaching, responsible for supervising and evaluating the faculty of the Business, Social Sciences, Engineering and Pure Sciences Programs; monitoring performance through interactions with students and colleagues. Planning recruitment strategies; Interacting with the community to enhance the public image of the University; allocating the financial resources within this division.

Business and Social Sciences Programs Director, Instituto Tecnológico y de Estudios Superiores de Monterrey (ITESM) Campus León (July, 1983 - December, 1984), N/A, Mexico. Campus León Responsible for hiring, supervising, and evaluating the faculty [about 12 full time & 25 part time] – Teaching

Physics and Mathematics Department Director, Instituto Tecnológico y de Estudios Superiores de Monterrey (ITESM) Campus León (July, 1980 - May, 1982), N/A, Mexico. Campus León Responsible for hiring, supervising, and evaluating faculty [about 5 full time & 12 part time] – Course planning Teaching

C. PROFESSIONAL HONOURS

2022: Best Reviewer Award: ASAC Business History Division, Administrative Sciences Association of Canada.

2020: Best Paper Award, ASAC. Business History Division, Virtual.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	2		3
Articles-in-Progress (All)	1	6		7
Publications in Conference Proceedings (Refereed)	1	2	1	4

Paper Presentations (Refereed)		2		2
Research Report, Non-Refereed		1		1
Grants - Funded (both refereed and non-refereed)		4		4
Other Research, Non-refereed	1	5		6
Totals	4	22	1	27

Refereed Scholarly Publications

Articles in Refereed Journals

- Farivar, S., Golmohammadi, A., & Ramirez, A. (2022). Analytics Capability and Firm Performance in Supply Chain Organizations: The Role of Employees' Analytics Skills. *Analytics*, 1 (1), 1-14. [C,Other]
- Khosrojerdi, F., Akhigbe, S., Gagnon, S., Ramirez, A., & Richard, G. (2021). Integrating artificial intelligence and analytics in smart grids: a systematic literature review. *International Journal of Energy Sector Management*. [C,Other]
- 2022 Update: DOI with no volume assigned
- Azzi, S., Gagnon, S., Ramirez, A., & Richards, G. (2020). Healthcare Applications of Artificial Intelligence and Analytics: A Review and Proposed Framework. *Applied Sciences*, 10 (18), 65-53. [C,Other]
- Received: 18 August 2020 / Revised: 14 September 2020 / Accepted: 17 September 2020 / Published: 19 September 2020 [open access]
- Doyle, J., Heslop, L., Ramirez, A., & Cray, D. (2012). Trust Intentions in Readers of Blogs. *Management Research Review*, 35 (9), 837-856. [C]
- Special issue on Marketing and Social Media
- Doyle, J., Heslop, L., Ramirez, A., Cray, D., & Armenakyan, A. (2012). Trust Building in Wine Blogs: A Content Analysis. *International Journal of Wine Business Research*, 24 (3), 196-218. [B]
- Winner of an Emerald Journal 2013 Award of Excellence - Highly Commended Paper Award

Articles in Refereed Conference Proceedings

Full Paper

- Tunçer, S., & Ramirez, A. (2022). Exploring the Role of Trust during Human-AI Collaboration in Managerial Decision-Making Processes. *Human-Computer Interaction International*, 39, 1-17.
- Ramirez, A. (2020). Of Bugs, Languages and Business Models: A History. *Administrative Sciences Association of Canada*.
- Business History Track of ASAC 2020
- Farivar, S., Golmohammadi, A., & Ramirez, A. (2019). Looking at Prescriptive Analytics: Bringing Supply Chain Management models into Business Analytics. *Administrative Sciences Association of Canada*.
- ASAC2019 – the Administrative Sciences Association of Canada's Annual Meeting – IS Division, St. Catherine's, Ontario. May
- Girouard, A., Biddle, R., Chiasson, S., Fail, S., Ramirez, A., N. Graham, C. Herdman, B. Kapralos (2019). Collaborative Learning of Usability Experiences: Improving UX Training through Experiential Learning. *Canadian Engineering Education Association*.
- Submitted to CEEA-ACEG 2019, The conference: Learning to Learn – Preparing Tomorrow's Engineers of the Canadian Engineering Education Association. June 2019
- Ramirez, A., & Neilson, L. (2018). How are we confronting Drucker's Management Challenges for the 21st Century? An investigation on the state of the Information Revolution. *Administrative Sciences Association of Canada (ASAC)*.
- Administrative Sciences Association of Canada's Annual Meeting – Business History Division, Toronto, Ontario
- Ramirez, A. (2015). Are Corporations managed by Machines? A late response to Herbert A. Simon. *Administrative Sciences Association of Canada (ASAC)*.
- Business History Track. Halifax, Nova Scotia.
- Smith, T., Grant, G., & Ramirez, A. (2014). Investigating the influence of psychological ownership and resistance on usage intention among physicians. *Hawaii International Conference on System Sciences (HICSS)*.
- Waikoloa, Hawaii.
- Ramirez, A. (2014). A Massive Open Online Courses Odyssey: A Confessional Account. *European Conference on Social Media (ECSM)*.
- Brighton, UK.
- Ramirez, A. (2014). Simon Says: Analyzing the impact of Herbert A. Simon's work in Business Administration. *Administrative Sciences Association of Canada (ASAC)*.
- Business History Track. Muskoka, Ontario
- Ramirez, A., & Neilson, L. (2013). Are we there yet? Universal Libraries at the Dawn of the Third Millennium. *Administrative Sciences Association of Canada (ASAC)*.
- Calgary, Alberta.
- Cray, D., Doyle, J., Heslop, L., & Ramirez, A. (2012). The Effect of Culture on Attitudes toward Blogs and Bloggers. *Academy of International Business - Midwest (AIB-MW) Annual Conference*.

Chicago, IL.

Ramirez, A., Youssef, Y., & Dolci, P. (2012). An Assessment of Knowledge Management Practices in Brazilian Higher Education Institutions. *Administrative Sciences Association of Canada (ASAC)*.

Saint John's, Newfoundland.

Ramirez, A., & Neilson, L. (2012). From Bush to Berners-Lee: Following the Trail of Pioneers in Search of the Universal Library. *Administrative Sciences Association of Canada (ASAC)*.

Saint John's, Newfoundland.

Doyle, J., Heslop, L., Ramirez, A., & Cray, D. (2011). What Really Matters to Trust Intentions for Readers of Topic-Area Blogs. *Administrative Sciences Association of Canada (ASAC)*.

Montreal, QC.

Ramirez, A., Ji, S., Riordan, R., Ulbrich, F., & Hine, M. (2010). Empowering Business Students: Using Web 2.0 Tools in the Classroom. *International Conference on Computer Supported Education*.

April 7-10, 2010. Valencia, Spain.

Abstract Only

Neilson, L., & Ramirez, A. (2017). Making and Marketing a Canadian Icon: Tom Thomson. *Administrative Sciences Association of Canada (ASAC)*.
ASAC2017 – the Administrative Sciences Association of Canada's Annual Meeting – Business History Track, Montreal, Quebec

Edited Books

Youssef, Y., & Ramirez, A. (Ed.). (2011). *Social Software in Higher Education: Pedagogical Models and Universities Strategies*. Santa Catarina, Brazil: Unisul.

Chapters in Edited Books

Ramirez, A. (2011). The Consequences of Information and Communication Technologies in Higher Education: The Age of the Network Society. In Youssef, Y. and A. Ramirez (Eds.), *Social Software in Higher Education: Pedagogical Models and Universities Strategies*. Santa Catarina, Brazil: Unisul. [Status: Published]

Youssef, Y., & Ramirez, A. (2011). The need for a reflection on ICT praxis in Higher Education, Introduction. In Youssef, Y. and A. Ramirez (Eds.), *Social Software in Higher Education: Pedagogical Models and Universities Strategies*. Santa Catarina, Brazil: Unisul. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Scholarly Publications

2022: Farivar, S., Golmohammadi, A., & Ramirez, A., *Development of Analytics Capability in Supply Chain Organizations*.

2020: Fai, S., Hassan, A., Khan, T., Lauriault, T., & Ramirez, A. *Shared Mobility Practices in Canada 2020*.

Other Publications

Other Publications

2019: Gagnon, S., Ramirez, A., & Richards, G., *Algorithmic Decision-Making: promises and challenges for governments*. Gagnon, S., A. Ramirez & G. Richards. Algorithmic Decision-Making: promises and challenges for governments, *Analytics in Government Quarterly – for government decision-makers*, 1, (1), October, 4-6

2019: Ramirez, A., *AI for Decision-Making in Public Administration*. *Analytics in Government Quarterly – for government decision-makers*, 1, (1), October, 22-23

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Associate Editor

2010 – 2017: International Journal of Sociotechnology and Knowledge Development (International).

2010 – 2017: Journal of Information, Information Technology and Organizations (International).

2010: Journal of Information, Information Technology and Organizations (International).

Editor: Book / Textbook

2011: Social Software in Higher Education: Pedagogical Models and Universities Strategies (Unknown). Youssef, Y. and A. Ramirez (eds.) *Social Software in Higher Education: Pedagogical Models and Universities Strategies*, Santa Catarina, Brazil: Unisul

Editor: Conference Proceedings

2017: Administrative Sciences Association of Canada (ASAC), Montreal, Canada-Quebec (National). Proceedings of the Business History Division of ASAC 2017

2017: Administrative Sciences Association of Canada (ASAC), Montreal, Canada-Quebec (National). Divisional Editor, Business History Division – for ASAC2017

2016: Administrative Sciences Association of Canada (ASAC), Edmonton, Canada-Alberta (National). Proceedings of the Business History Division of

Presentations

Papers Presented at Conferences

Refereed

Ramirez, A. & Tunçer, S. (2022). *Exploring the role of Trust during Human-AI Collaboration in Managerial Decision-Making Processes*. Human Computer Interaction International, Virtual, Virtual.

Ramirez, A. (2020). *Of Bugs, Languages, and Business Models: A History*. Administrative Sciences Association of Canada, Virtual, Virtual.

Neilson, L. & Ramirez, A. (2018, May). *How are we confronting Drucker's Management Challengers for the 21st Century? An investigation on the state of the Information Revolution*. Administrative Sciences Association of Canada, Toronto, Canada-Ontario.

Description: May 27 to 29, Ryerson University

Neilson, L. & Ramirez, A. (2017). *Making and Marketing a Canadian Icon: Tom Thomson*. Administrative Sciences Association of Canada (ASAC), Montreal, Canada-Quebec.

Description: Presented by Dr. Ramirez at the 45th Annual Conference of the Administrative Sciences Association of Canada, Business History Division, May 29 – June 1, Montreal, Quebec. [Abstract published in proceedings.]

Ramirez, A. & Neilson, L. (2013). *Are we there yet? Universal Libraries at the dawn of the third millennium*. Administrative Sciences Association of Canada (ASAC), Calgary, Canada-Alberta.

Description: June 8-11. Presented by Dr. Ramirez.

Ramirez, A. & Neilson, L. (2012). *From Bush to Berners-Lee: Following the trail of pioneers in search of the Universal Library*. Administrative Sciences Association of Canada (ASAC), St. John's, Canada-Newfoundland.

Description: June 9-12. Presented by Dr. Ramirez (authors declined publication in proceedings)

Other Presentations

Invited Lecture

2017: Research Themes on Data Science, Carleton University, Ottawa, Canada-Ontario. Business Analytics Research Agenda Research Themes on Data Science, March 16, to students of the DATA5000 seminar

2016: Research Themes on Data Science, Carleton University, Ottawa, Canada-Ontario. Business Analytics as Praxis. Research Themes on Data Science, March 21, to students of the DATA5000 seminar

Presentation

2021: Canadian Association of CIOs. Artificial Intelligence and the Future of Work: Attitudes, Anxiety, Acceptance & Trust, To CIO CAN, The Canadian Association of CIOs, March 27

2021: Futures: Economic impact. The Future of Work: the consequences of Innovation. To Urban Futures: Economic impact, April 23

2021: Imagining Canada's Digital Twin. A Business Model for Canada's Digital Twin. With Tessa Hebb to ICDT members, June 7

2020: Be Ready for a Future in which AI will be the Basis of Decision Making in the Public Sector. The Almost Mythical Expectations Concerning AI's Impact on our Future, with G. Richards (UofO) and S. Gagnon (UQO). AI in the Public Sector event: Be Ready for a Future in which AI will be the Basis of Decision Making in the Public Sector, February 18-19

2020: Be ready for a future in which AI will be the basis for decision making in the pub sector. "Be ready for a future in which AI will be the basis for decision making in the pub sector" (event), Ottawa, ON Presentation title: The Almost-Mythical expectations concerning AI impact in our future. With Gregory Richards and S. Gagnon, February 19

2019: Urban Futures: Charrette II--Economy. Government Analytics Research Institute, Connector, Maven, or Salesperson? Presentation at Urban Futures: Charrette II--Economy, October 31

2019: Institute for on Governance, Ottawa, Canada-Ontario. Skills Development for AI, presentation to participants in the Introduction to Artificial Intelligence for Policy Practitioners course at the Institute for on Governance. November, 27

2014: Colloquium on Big Data, Carleton University, Carleton University, Canada-Ontario. The Business of Data Science. Colloquium on Big Data, February 21, at the Centre for Quantitative Analysis and Decision Support, Carleton University

2014: Data Science Institute, Carleton University, Ottawa, Canada-Ontario. Business Analytics: A Research Agenda. Data Day, April 24, launching of Carleton's Data Science Institute.

2012: North American Wine Bloggers Conference, Portland, Oregon. Cray, D., L. Heslop, A. Ramirez and J. Doyle. What wine bloggers think, Presentation to the 2012 North American Wine Bloggers Conference, Portland Oregon, Aug. 17 – 19, 2012

2012: Polytechnic University of Aguascalientes, Aguascalientes, Mexico-Aguascalientes. The Future of Open Courseware in Higher Education [El futuro de la Educacion en line en Universidades] Presented to the Faculty of Open Education at Polytechnic University of Aguascalientes, November 16

2012: Polytechnic University of Aguascalientes, Aguascalientes, Mexico-Aguascalientes. Communication, Collaboration, Cooperation and Connectivity in Higher Education [Comunicación, Colaboración, Cooperación y Conectividad en Universidades] Presented to Faculty, Staff and

Students of the Polytechnic University of Aguascalientes, November 20

2012: Autonomous University of Aguascalientes, Aguascalientes, Mexico-Aguascalientes. Digital Strategies for Universities: Are MOOCs the new normal? [Estrategias Digitales: ¿Son los Cursos Masivos Abiertos en Línea el futuro de las universidades?] Presented to Faculty and Students of the Master Program in Information Science at Autonomous University of Aguascalientes, November 29

2011: Universidade do Sul de SC, Webinar, Virtual. Social Software in Higher Education [El uso de software social en Instituciones de Educación Superior] Presented via Web-minar to UNISUL, November 10, 2011

Contract or Other Research

Research Grants and Awards

Grants

2021 [Year 2 of 2]: Ramirez, A. New Frontiers Research Fund- Exploration, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). co-applicant. [Status: Funded]

2020 [Year 1 of 2]: Ramirez, A. New Frontiers Research Fund- Exploration, Co-Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). co-applicant. [Status: Funded]

2020 [Year 2 of 2]: Ramirez, A. Multidisciplinary Research Catalyst Fund, Collaborator, PRI-Carleton University. [Status: Funded]

2019 [Year 1 of 2]: Ramirez, A. Multidisciplinary Research Catalyst Fund, Collaborator, PRI-Carleton University. [Status: Funded]

2017 [Year 1 of 6]: Ramirez, A. & Shikharesh, M., Collaborative Research and Training Experience, Co-Investigator, PRI-Carleton University. [Status: Not Funded]

2016 [Year 1 of 6]: Ramirez, A. & Majumdar, S., Collaborative Research and Training Experience, Co-Investigator, GOV-Natural Sciences and Engineering Research Council of Canada (NSERC). [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board Member: PRJ Editorial Review Board

2020 – 2022: Business Technology Management Journal.

2017 – 2022: Multidisciplinary Business Review.

2010 – 2020: Journal of Information, Information Technology and Organizations.

2019: Analytics in Government Quarterly – for government decision-makers.

2016 – 2017: Multidisciplinary Business Review.

2015 – 2016: Multidisciplinary Business Review.

2014 – 2015: Multidisciplinary Business Review.

2013 – 2014: Multidisciplinary Business Review.

2012 – 2013: Multidisciplinary Business Review.

2011 – 2012: Multidisciplinary Business Review.

2010 – 2011: Multidisciplinary Business Review.

Board of Directors: Substantial Involvement

2020 – 2021: Government Analytics Research Institute.

Chair: Conference / Track / Program

2018: Administrative Sciences Association of Canada (ASAC), Toronto, Canada-Ontario. Business History Division – for ASAC2018.

2016: Administrative Sciences Association of Canada (ASAC), Edmonton, Canada-Alberta. Whiter Business Analytics: its role in the Business Curriculum. Panel organized for ASAC2016, in Edmonton, AB. Panelists include: Dr. Michael Bliemel, Dalhousie University; Dr. Murat Kristal, York University; Dr. Gokul Bhandari, University of Windsor; Mr. Hugh Cairns, SAS. A. Ramirez, Chair.

2010: Conf- IRM, Montego Bay, Jamaica. Co Chair of the Emerging Information Technologies Track

Invited Lecture

2017: Research Themes on Data Science, Carleton University, Ottawa, Canada-Ontario. Business Analytics Research Agenda Research Themes on Data Science, March 16, to students of the DATA5000 seminar

2016: Research Themes on Data Science, Carleton University, Ottawa, Canada-Ontario. Business Analytics as Praxis. Research Themes on Data Science, March 21, to students of the DATA5000 seminar

Member: Committee/Task Force

2020: Urban Futures.

2010: International Conference on e- Government. Member of the Program Committee

Other Professional Service Activities

2019 – 2020: SSHRC. Assessor for SSHRC Grant Application

2016: Administrative Sciences Association of Canada (ASAC), Edmonton, Canada-Alberta. Program Coordinator – Business History Division – for ASAC2016

2010: Association for Information Systems. Vice President, Membership and Communications, Special Interest Group in Service Sciences (SIG-SRV)

Reviewer: Ad Hoc Reviewer for a Journal

2022: Journal of Personalized Medicine.

2021: International Journal of Wine Business Research.

2020: Multidisciplinary Business Review.

2020: Multidisciplinary Business Review.

2017 – 2018: Multidisciplinary Business Review.

2017: Information Systems Journal.

2016 – 2017: International Journal of Wine Business Research.

2014: Electronic Journal on E-Learning.

2013: Communications of the Association for Information Systems.

2012: Administrative Sciences.

2011 – 2012: International Journal of Information Technology and Management.

2010: European Journal of Information Systems.

Reviewer: Conference Paper

2014 – 2023: Hawaii International Conference on System Sciences (HICSS).

2010 – 2023: Administrative Sciences Association of Canada.

2014 – 2017: Administrative Sciences Association of Canada (ASAC).

2014 – 2015: Conf- IRM.

2012: Americas Conference on Information Systems.

2012: Informing Science and IT Education.

2010 – 2012: Administrative Sciences Association of Canada (ASAC).

Scholarly Work in Progress

Papers Under Review

Farivar, S., Golmohammadi, A., & Ramirez, A. (2020). "Data Analytics Capabilities in Supply Chain Management," Initial submission.

Description: Enterprise Information Systems journal

Farivar, S., Golmohammadi, A., & Ramirez, A. (2020). "Analytics Capability and Firm Performance in Supply Chain Organizations," Initial submission to *Decision Support Systems*.

Working Papers

Ramirez, A. (2023). "AI, Robots, and the Future of Work: Attitudes, Anxiety, Acceptance and Trust."

Akhigbe, O., Gagnon, S., Richard, G., & Ramirez, A. (2022). "Cognitive Analytics Projects: A Review of Industries with Extensive Use of Intelligent Systems."

Ramirez, A. (2022). "Digital Twins for Management: Control at your fingertips."

Ramirez, A. (2020). "Ecos of conversations," targeted for Administrative Sciences Association of Canada (ASAC).

Akhigbe, O., Gagnon, S., & Ramirez, A. (2020). "Cognitive Analytics Projects: A Review of Industries with Extensive Use of Intelligent Systems."

Description: To be submitted to Communications of AIS.

Ramirez, A. (2017). "Fuzzy Logic for Management Decision Making," targeted for Decision Support Systems.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2023/Fall	BUSI2402	Business Application Development	0.5	69	Main	100%
2023/Fall	BUSI2401	Intro Data Analytics	0.5	72	Main	100%

2023/Fall	BUSI3406	Business Analytics for Principles	0.5	8	Main	100%
2023/Winter	BUSI2401	Intro Data Analytics	0.5	49	Main	100%
2022/Fall	BUSI4406	Business Analytics	0.5	21	Main	100%
2022/Fall	BUSI2402	Business Application Development	0.5	49	Main	100%
2022/Winter	ITIS5431	Business Analytics for Managers	0.25	34	Shanghai	100%
2022/Winter	ITIS5414	Emerging Information Technologies & Business Innovation	0.25	34	Shanghai	100%
2021/Fall	BUSI2402	Business Application Development	0.5	67	Main	100%
2021/Fall	BUSI4406	Business Analytics	0.5	40	Main	100%
2021/Winter	ITIS5431	Business Analytics for Managers	0.25	18	Main	100%
2021/Winter	BUSI2400	Foundations of Information Systems	0.5	80	Main	100%
2020/Fall	ITIS5414	Emerging Information Technologies & Business Innovation	0.25	12	Main	100%
2020/Fall	BUSI4406	Business Analytics	0.5	39	Main	100%
2020/Fall	BUSI2402	Business Application Development	0.5	64	Main	100%
2020/Summer	ITIS5432	Business Analytics Methods	0.25	18	Main	100%
2020/Summer	ITIS5431	Business Analytics for Managers	0.25	26	Main	100%
2019/Winter	ITIS5431	Business Analytics for Managers	0.25	19	Main	100%
2019/Winter	BUSI2400	Foundations of Information Systems	0.5	87	Main	100%
2019/Winter	BUSI2400	Foundations of Information Systems	0.5	88	Main	100%
2018/Fall	ITIS5414	Emerging Information Technologies & Business Innovation	0.25	12	Main	100%
2018/Fall	BUSI2402	Business Application Development	0.5	38	Main	100%
2018/Fall	BUSI4406	Business Analytics	0.5	45	Main	100%
2018/Summer	ITIS5431	Business Analytics for Managers	0.25	30	Shanghai	100%
2018/Summer	ITIS5431	Business Analytics for Managers	0.25	19	Shanghai	100%
2018/Winter	ITIS5431	Business Analytics for Managers	0.25	20	Main	100%
2018/Winter	BUSI3401	Application Development for Online Environments	0.5	16	Main	100%
2018/Winter	ITIS5431	Business Analytics for Managers	0.25	41	Shanghai	100%
2018/Winter	ITIS5432	Business Analytics Methods	0.25	41	Shanghai	100%
2017/Fall	BUSI1402	Introduction to Business Information & Communications Technology	0.5	117	Main	100%
2017/Fall	BUSI2402	Business Application Development	0.5	63	Main	100%
2017/Fall	BUSI4406	Business Analytics	0.5	45	Main	100%
2017/Summer	BUSI1402	Introduction to Business Information & Communications Technology	0.5	29	Main	100%
2017/Winter	ITIS5431	Business Analytics for Managers	0.25	14	Main	100%
2017/Winter	BUSI3401	Application Development for Online Environments	0.5	15	Main	100%
2016/Fall	BUSI4406	Business Analytics	0.5	31	Main	100%
2016/Fall	BUSI2402	Business Application Development	0.5	47	Main	100%
2016/Winter	ITIS5431	Business Analytics for Managers	0.25	14	Main	100%
2016/Winter	BUSI4406	Business Analytics	0.5	46	Main	100%

2016/Winter	BUSI3401	Application Development for Online Environments	0.5	20	Main	100%
2015/Fall	BUSI1402	Introduction to Business Information & Communications Technology	0.5	56	Main	100%
2015/Fall	BUSI2402	Business Application Development	0.5	42	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2023-2024: Christos Karanassios
 2017-2018: Ying Zhou
 2017-2018: HCI, Emily Walpole
 2016-2017: Shaikah Bakerman
 2016-2017: HCI, Mark McKay
 2015-2016: Matthew Hull
 2015-2016: Jesse Gerroir
 2015-2016: Colin Killby
 2015-2016: HCI, Doaa Elrayes

PhD. Comprehensive Committees:

2023-2024: Thumesha Jayatilake

PhD. Thesis Committees:

2019-2020: Amirsam Khataei, PhD Electrical and Computer Engineering
 2018-2019: Internal-External, Hala Assal
 2014-2015: Mohammad Ariyan
 2012-2013: Irvine Johnston
 2011-2012: Aren Hunter

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Professional Memberships

Administrative Science Association of Canada, N/A
 Association for Computer Machinery, N/A
 Association for Information Systems, N/A
 Informing Science Institute, N/A
 Institute for Operations Research and Management Science (INFORMS), N/A
 Special Interest Group: Computers, Information and Society, N/A
 Government Analytics Research Institute (GARI), 2019

Skills

Languages

Read/Write/Speak
 English 100% / 100% / 100%
 French 100% / 80% / 90%
 Spanish 100% / 100% / 100%

Research Reports

2020: Fai, S., Hassan, Y., Khan, A., Laurialt, T., & Ramirez, A. Shared Mobility Project., submitted to Transport Canada.

Curriculum Vitae - Sprott School of Business

Rebecca Renfroe, MAcc
Associate Professor, Teaching Stream - Tenured,
Sprott School of Business (Accounting)
Telephone:
Email: rebecca.renfroe@carleton.ca
AACSB Qualification: Scholarly Practitioner (SP) , Participation: Participating
Orcid: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Master of Accounting. Carleton University.
Title: *Senate Medal for Outstanding Academic Achievement*

Bachelor of Education. University of Alberta.
Title: *With Distinction*

Bachelor of Commerce. University of Alberta.
Title: *With Distinction*

Professional Certifications

Carleton University Certificate in University Teaching, 2017

Chartered Professional Accountant (CPA), 2006

B. EMPLOYMENT

Academic Appointments

Instructor III, Sprott School of Business, Carleton University (2018 - Present), Ottawa, Canada-Ontario.

Contract Instructor, Accounting, Sprott School of Business, Carleton University (2006 - 2018), Ottawa, Canada-Ontario. Responsible for teaching accounting to undergraduates attending Carleton University.

Other Employment

Lead Facilitator - Management Accounting, CPA Canada (2014 - Present), Toronto, Canada-Ontario. Responsible for delivering a 6-week Management Accounting Module to CPA students; lead facilitator nationally, responsible for exam integrity, marking consistency, content monitoring and other means of assisting other facilitators for the Module.

Chief Financial Officer, Viva Voce Reporting (2000 - Present), Ottawa, Canada.

CFO of a mid-size firm with 25+ employees and a budget of \$2.5 million. Responsible for all financial aspects of the business including production and management of all financial data associated with the company. Key contact for all financial issues clients may have.

Accelerated Program Instructor, CMA Ontario (2007 - 2013), Toronto, Canada-Ontario. Responsible for teaching a 22-week preparation program to CMA applicants; topics include both financial and managerial accounting.

C. PROFESSIONAL HONOURS

2017: Senate Medal for Outstanding Academic Achievement, Carleton University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Revisions of Books, Monographs, Compilations, Manuals			2	2
Totals			2	2

Refereed Scholarly Publications

Other (Non-refereed) Scholarly Publications

Non-refereed books

Maurice, J., & Renfroe, R. (2020). *An Introduction to Management Accounting, Web Edition* (WEB ed.) CU Learn.

Maurice, J., & Renfroe, R. (2019). *An Introduction to Financial Accounting, Web Edition* (WEB ed.) CU Learn.

Maurice, J., & Renfroe, R. (2017). *An Introduction to Financial Accounting* (3rd ed.) Marie-France Gosselin.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4904	Directed Studies I	0.5	8	Main	100%
2024/Winter	ACCT5122	Issues in Taxation	0.25	2	Main	100%
2024/Winter	ACCT5001	Financial Accounting	0.25	280	Main	100%
2024/Winter	BUSI4905	Directed Studies II	0.5	1	Main	100%
2023/Fall	BUSI4904	Directed Studies I	0.5	8	Main	100%
2023/Fall	ACCT5120	Advanced Concepts	0.5	16	Main	100%
2023/Summer	ACCT5122	Issues in Taxation	0.25	6	Main	100%
2023/Summer	ACCT5120	Advanced Concepts	0.5	18	Main	100%
2023/Summer	ACCT5120	Advanced Concepts	0.5	26	Main	100%
2023/Summer	ACCT5001	Financial Accounting	0.25	134	Main	100%
2023/Winter	ACCT5122	Issues in Taxation	0.25	4	Main	100%
2023/Winter	ACCT5001	Financial Accounting	0.25	89	Main	100%
2022/Fall	BUSI3005	Taxation I	0.5	20	Main	100%
2022/Fall	ACCT5001	Financial Accounting	0.25	109	Main	100%
2022/Fall	ACCT5120	Advanced Concepts	0.5	22	Main	100%
2022/Fall	BUSI3005	Taxation I	0.5	57	Main	100%
2022/Summer	ACCT5122	Issues in Taxation	0.25	7	Main	100%
2022/Summer	ACCT5120	Advanced Concepts	0.5	22	Main	100%
2022/Summer	ACCT5120	Advanced Concepts	0.5	27	Main	100%
2022/Winter	ACCT5122	Issues in Taxation	0.25	10	Main	100%
2021/Fall	ACCT5120	Advanced Concepts	0.5	22	Main	100%
2021/Fall	BUSI3005	Taxation I	0.5	53	Main	100%
2021/Fall	BUSI3005	Taxation I	0.5	46	Main	100%
2021/Summer	ACCT5120	Advanced Concepts	0.5	29	Main	100%
2021/Summer	ACCT5120	Advanced Concepts	0.5	24	Main	100%
2021/Summer	ACCT5122	Issues in Taxation	0.25	10	Main	100%
2021/Summer	ACCT5123	Advanced Taxation	0.5	28	Main	100%
2021/Summer	ACCT5123	Advanced Taxation	0.5	13	Main	100%
2021/Summer	ACCT5123	Advanced Taxation	0.5	24	Main	100%
2021/Winter	ACCT5122	Issues in Taxation	0.25	3	Main	100%

2020/Fall	ACCT5120	Advanced Concepts	0.5	18	Main	100%
2020/Fall	BUSI3005	Taxation I	0.5	47	Main	100%
2020/Fall	BUSI3005	Taxation I	0.5	57	Main	100%
2020/Summer	ACCT5122	Issues in Taxation	0.25	13	Main	100%
2020/Summer	ACCT5120	Advanced Concepts	0.5	30	Main	100%
2020/Summer	ACCT5120	Advanced Concepts	0.5	28	Main	100%
2020/Winter	ACCT5122	Issues in Taxation	0.25	4	Main	100%
2019/Fall	BUSI3005	Taxation I	0.5	51	Main	100%
2019/Fall	ACCT5120	Advanced Concepts	4	9	Main	80%
2019/Fall	BUSI3005	Taxation I	0.5	37	Main	100%
2019/Fall	ACCT5001	Financial Accounting	0.25	29	Main	100%
2019/Summer	ACCT5122	Issues in Taxation	0.25	8	Main	100%
2019/Summer	ACCT5120	Advanced Concepts	0.5	30	Main	100%
2019/Summer	ACCT5120	Advanced Concepts	0.5	29	Main	100%
2019/Winter	ACCT5122	Issues in Taxation	0.25	2	Main	100%
2018/Fall	ACCT5120	Advanced Concepts	0.42	14	Main	83%
2018/Fall	BUSI1004	Financial Accounting for Business Students	0.5	78	Main	100%
2018/Fall	BUSI3005	Taxation I	0.5	39	Main	100%
2018/Fall	BUSI3005	Taxation I	0.5	55	Main	100%
2018/Summer	BUSI5906	Special Topics	0.25	24	Main	100%
2018/Summer	BUSI5906	Special Topics	0.25	29	Main	100%
2018/Summer	ACCT5122	Issues in Taxation	0.25	6	Main	100%
2018/Summer	ACCT5120	Advanced Concepts	0.13	6	Main	25%
2018/Summer	ACCT5120	Advanced Concepts	0.13	7	Main	25%
2018/Winter	BUSI3005	Taxation I	0.5	40	Main	100%
2018/Winter	BUSI1005	Managerial Accounting for Business Students	0.03	6	Main	6%
2018/Winter	BUSI1005	Managerial Accounting for Business Students	0.47	89	Main	94%
2017/Fall	BUSI3005	Taxation I	0.5	52	Main	100%
2017/Fall	BUSI3005	Taxation I	0.5	60	Main	100%
2017/Winter	BUSI1004	Financial Accounting for Business Students	0.5	14	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: BEnt (Co-Chair)

2024-2025: TA Working group (Co-Chair)

2024-2025: Curriculum Review Committee (Undergraduate Programs)

2023-2024 – 2024-2025: BIB Task Force

2023-2024: Sprott Equity, Diversity and Inclusion (EDI) Action Group (Co-Chair)

2023-2024: BCOM Task Force

2021-2022: Teaching Mentors Project

Sprott School of Business, Carleton University

School Assignments

Other Committees:

2019-2020 – 2021-2022: Certificate in Real Estate Development

Credentials

Curriculum Vitae - Sprott School of Business

Robin Ritchie, PhD
Associate Professor - Tenured, 2012
Sprott School of Business (Marketing)
Telephone: 613-520-2600 x2420
Email: robin.ritchie@carleton.ca
AACSB Qualification: Practice Academic (PA) , Participation: Participating
Orcid: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of British Columbia.
Title: *Dissertation: The Mutable Meaning of Ads: Advertising thorough the Eyes of the Skeptical Consumer.*
Master of Science. University of British Columbia.
Bachelor of Arts. University of Calgary.

B. EMPLOYMENT

Academic Appointments

Associate Dean (Professional Graduate Programs), Sprott School of Business, Carleton University (July, 2019 - Present), Ottawa, Canada-Ontario.
Associate Professor, Sprott School of Business, Carleton University (July, 2012 - Present), Ottawa, Canada-Ontario. Marketing
Assistant Professor, Sprott School of Business, Carleton University (December, 2011 - June, 2012), Ottawa, Canada-Ontario. Marketing (tenured)
Assistant Professor, Sprott School of Business, Carleton University (July, 2008 - December, 2011), Ottawa, Canada-Ontario. Marketing (untenured)
Assistant Professor, Richard Ivey School of Business, University of Western Ontario (July, 2002 - June, 2008), London, Canada-Ontario.
Lecturer, Sauder School of Business, University of British Columbia (January, 2002 - April, 2002), Vancouver, Canada-British Columbia. Marketing

Other Employment

Marketing Research Coordinator, Alberta Tourism Partnership Corporation (Travel Alberta) (January, 1996 - August, 1997), Edmonton, Canada-Alberta.
Sales and Marketing Manager, Corporate Websites, Columbus Group Communications (May, 1995 - January, 1996), Vancouver, Canada-British Columbia.
Research Assistant, History of Advertising Archives, University of British Columbia (May, 1994 - May, 1995), Vancouver, Canada-British Columbia.
Research Assistant, Institut Turístic Valencià (Valencian Tourism Institute) (October, 1992 - March, 1993), Valencia, Spain.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		1		1
Grants - Funded (both refereed and non-refereed)		1		1
Totals		2		2

Refereed Scholarly Publications

Articles in Refereed Journals

Johnson, J., Ritchie, R., & van Oudheusden, J.B. (2019). Actualized Outcomes of International Business Case Competition Participation: A Three Country Exploratory Study. *Journal of International Business Education*, 14, 201-220. [B]
Forthcoming
White, K., Lin, L., Dahl, D., & Ritchie, R. (2016). When do Consumers Avoid Imperfections? Superficial Packaging Damage as a Contamination Cue. *Journal of Marketing Research*, 53 (1), 110-123. [A+,FT50]
Viswanathan, M., Ritchie, R., Sridharan, S., Venugopal, S., & Jung, K. (2012). Marketing Interactions in Subsistence Marketplaces: A Bottom-Up Approach to Designing Public Policy. *Journal of Public Policy and Marketing*, 31 (2), 159-177. [A]
Ritchie, J.R. B., Tung, V., & Ritchie, R. (2011). Tourism Experience Management Research: Emergence, Evolution and Future Directions. *International Journal of Contemporary Hospitality Management*, 23 (4), 419-438. [A]
Viswanathan, M., Sridharan, S., & Ritchie, R. (2010). Understanding Consumption and Entrepreneurship in Subsistence Marketplaces. *Journal of*

Other (Non-refereed) Scholarly Publications

Chapters in non-refereed books

Ritchie, R. (2015). 360 PI: A World of Opportunity. *Export Development Canada*. Network of International Business Schools Worldwide Case Competition.

Description: Used as final round case in 2015 Network of International Business Schools Worldwide Case Competition

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Ritchie, R., Johnson, J., & Van Oudheusden, J.B. (2017). *Actualized Outcomes of International Business Case Competition Participation: A Three Country Exploratory Study*. Network of International Business Schools Annual Conference, Leeds, United Kingdom.

Ritchie, R. (2013, October). *Strategic Advice for a Sustainable Academic Career in Tourism Management: Retrospective and Prospective Viewpoints*. International Conference on Sustainability Issues and Challenges in Tourism, Istanbul, Turkey.

Contract or Other Research

Research Grants and Awards

Grants

2021: Webb, A. & Ritchie, R., Accelerate (\$11,250.00), Co-Principal Investigator, PRI-Mitacs. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Reviewer: Ad Hoc Reviewer for a Journal

2010 – 2014: Journal of Business Research.

2011 – 2013: Journal of Consumer Psychology.

2011 – 2012: Journal of Advertising.

2011 – 2012: Nonprofit Management and Leadership.

2011 – 2012: Journal of Historical Research in Marketing.

2010 – 2012: Journal of Public Policy and Marketing.

Scholarly Work in Progress

Working Papers

Ritchie, R., Johnson, J., & van Oudheusden, J.B. (2017). "Actualized Outcomes of International Business Case Competition Participation: A Three Country Exploratory Study," targeted for Journal of Management Education.

Description: under preparation

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI5802	Business Ethics	0.25	40	Shanghai	100%
2024/Winter	MKTG5200	Marketing Strategy	0.5	17	Main	100%
2023/Summer	BUSI5992	Tutorials/Directed Studies in Business	0.25	1	Main	100%
2023/Winter	BUSI5906	Special Topics	0.25	38	Shanghai	100%
2023/Winter	MKTG5200	Marketing Strategy	0.5	42	Main	100%
2023/Winter	MKTG5200	Marketing Strategy	0.5	13	Main	100%
2022/Fall	STGY5900	Corporate & Business Strategy	0.5	21	Main	100%
2022/Fall	MKTG5200	Marketing Strategy	0.5	116	Main	100%
2022/Summer	MKTG5200	Marketing Strategy	0.5	11	Main	100%
2022/Summer	BUSI5997	Project Based Service Learning	0.5	28	Main	100%
2022/Winter	BUSI5997	Project Based Service Learning	0.5	3	Main	100%

2022/Winter	BUSI5900	Directed Studies	0.5	0	Main	100%
2022/Winter	BUSI5906	Special Topics	0.25	34	Shanghai	100%
2022/Winter	BUSI5992	Tutorials/Directed Studies in Business	0.25	0	Main	100%
2022/Winter	MKTG5200	Marketing Strategy	0.5	17	Main	100%
2022/Winter	BUSI5992	Tutorials/Directed Studies in Business	0.25	0	Main	100%
2021/Fall	BUSI5997	Project Based Service Learning	0.5	10	Main	100%
2021/Fall	BUSI5992	Tutorials/Directed Studies in Business	0.25	0	Main	100%
2021/Fall	BUSI5992	Tutorials/Directed Studies in Business	0.25	1	Main	100%
2021/Fall	BUSI5900	Directed Studies	0.5	0	Main	100%
2021/Winter	MKTG5200	Marketing Strategy	0.5	25	Main	100%
2021/Winter	BUSI5906	Special Topics	0.25	28	Shanghai	100%
2021/Winter	BUSI5900	Directed Studies	0.5	11	Main	100%
2020/Fall	BUSI5992	Tutorials/Directed Studies in Business	0.25	4	Main	100%
2020/Fall	BUSI5992	Tutorials/Directed Studies in Business	0.25	5	Main	100%
2020/Fall	BUSI5992	Tutorials/Directed Studies in Business	0.25	12	Main	100%
2020/Fall	BUSI5900	Directed Studies	0.5	12	Main	100%
2020/Summer	BUSI5900	Directed Studies	0.5	18	Main	100%
2020/Summer	BUSI5900	Directed Studies	0.5	1	Main	100%
2020/Winter	MKTG5200	Marketing Strategy	0.5	24	Main	100%
2020/Winter	MKTG5200	Marketing Strategy	0.5	24	Main	100%
2019/Fall	BUSI6201	Seminar in Marketing II	0.33	2	Main	67%
2019/Fall	BUSI5281	Seminar in Marketing II: Consumer Behaviour	0.17	1	Main	33%
2019/Winter	MKTG5200	Marketing Strategy	0.5	15	Main	100%
2019/Winter	MKTG5200	Marketing Strategy	0.5	34	Main	100%
2018/Fall	BUSI6200	Seminar in Marketing I	0.5	2	Main	100%
2018/Fall	BUSI3205	Marketing Communications	0.5	54	Main	100%
2018/Winter	MKTG5200	Marketing Strategy	0.5	26	Main	100%
2018/Winter	BUSI3205	Marketing Communications	0.5	34	Main	100%
2018/Winter	MKTG5200	Marketing Strategy	0.5	34	Main	100%
2017/Fall	BUSI6200	Seminar in Marketing I	0.5	2	Main	100%
2017/Fall	BUSI3205	Marketing Communications	0.5	58	Main	100%
2017/Winter	MKTG5200	Marketing Strategy	0.5	26	Main	100%
2017/Winter	MKTG5200	Marketing Strategy	0.5	35	Main	100%
2017/Winter	BUSI3205	Marketing Communications	0.5	60	Main	100%
2016/Fall	BUSI3205	Marketing Communications	0.5	58	Main	100%
2016/Winter	MKTG5200	Marketing Strategy	0.5	26	Main	100%
2016/Winter	MKTG5200	Marketing Strategy	0.5	33	Main	100%

2015/Fall	BUSI4208	Marketing Management	0.5	55	Main	100%
2015/Fall	BUSI6201	Seminar in Marketing II	0.5	4	Main	100%
2015/Fall	BUSI5106	Business Case Analysis and Presentation	0.25	24	Main	100%

Service to the institution (Academic)

University Assignments

PhD. Thesis Committees:

2012-2013: Devjani Sen

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: TA Working group (Co-Chair)

2024-2025: DBA Working Group (Co-Chair)

2022-2023: Curriculum Review Committee (MBA)

2021-2022: Curriculum Review Committee (MBA)

2019-2020 – 2021-2022: Curriculum Review Committee (MAcc) (Co-Chair)

2019-2020: Curriculum Review Committee (MBA)

Credentials

Curriculum Vitae - Sprott School of Business

Jose Rojas-Mendez, PhD
Full Professor - Tenured, 2010
Sprott School of Business (International Business)
Telephone: 613-520-2600 x8014
Email: jose.rojas@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-5974-5360>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. University of Manchester.
Title: *Manchester Business School. Dissertation Title: "Attitude to Time and Advertising in Explaining Advertising Avoidance".*

Master of Business Administration. University of Ottawa.
Title: *Faculty of Administration*

Bachelor of Commerce. Universidad de Talca.
Title: *Faculty of Administration. Received dual degrees in Public Accounting and Auditing*

B. EMPLOYMENT

Academic Appointments

Adjunct Professor, Woxsen University (2022 - Present), Hyderabad, India.

Full Professor, Sprott School of Business, Carleton University (2015 - Present), Ottawa, Canada-Ontario.

Director MBA Sprott - Cesa, Bogota, Colombia, Sprott School of Business, Carleton University (2014 - Present), Ottawa, Canada-Ontario.

Director, Bachelor of International Business., Sprott School of Business, Carleton University (2009 - Present), Ottawa, Canada-Ontario. Bachelor of International Business.

Adjunct Professor, Universidad Católica de la Santísima Concepción (UCSC) (January, 2023 - April, 2023), Concepcion, Chile.

Virtual Visiting Professor, ESPAE Graduate School of Management (2022), Guayaquil, Ecuador.

Virtual Visiting Professor, University of Santander (July, 2021 - August, 2021), Bucaramanga, Colombia.

ESPAE Graduate School of Management, ESPAE Graduate School of Management (September, 2021 - October, 2021), Guayaquil, Ecuador.

Visiting Researcher, ESPAE Graduate School of Management (August, 2020 - December, 2020), Guayaquil, Ecuador.

Visiting Researcher, ESPAE Graduate School of Management (2019), Guayaquil, Ecuador.

Visiting Professor, Montpellier Business School (2019), Montpellier, France.

Visiting Researcher, Universidad de La Serena (2019), La Serena, Chile.

Associate Professor, Sprott School of Business, Carleton University (2007 - 2015), Ottawa, Canada-Ontario. International Business and Marketing (tenured since 2010).

Director, Sprott School of Business, Carleton University (July, 2011 - June, 2012), Ottawa, Canada-Ontario.

Adjunct Research Professor, Carleton University (2006 - 2007), Ottawa, Canada-Ontario.

Dean, College of Business Administration, Universidad de Talca (2005 - 2007), Maule Region, Chile.

Associate Professor, Universidad de Talca (1997 - 2007), Maule Region, Chile. Tenured since 1996

Director of Graduate Studies, College of Business Administration, Universidad de Talca, Chile (2002 - 2004), Maule Region, Chile.

Director of the MBA Program, Universidad de Talca (1995 - 1999), Maule Region, Chile.

Director of the Center for Business Development, Universidad de Talca (1993 - 1998), Maule Region, Chile.

Assistant Professor, Universidad de Talca (1992 - 1997), Maule Region, Chile.

C. PROFESSIONAL HONOURS

2022: Person of the Year Award, Chilean Association of Business School (ASFAE). Recipient of the Person of the Year Award by The Chilean Association of Business School (ASFAE) for outstanding academic career and contribution to Multidisciplinary Business Review, the official academic journal of ASFAE..

2018: Best Paper Award, Journal of Product and Brand Management (Emerald). Recipient of the Best Paper Award published during 2018 in the Journal of Product and Brand Management (Emerald). Paper title: Brand Personality: Theory and Dimensionality (co-authored with G. Davies, S. Wheelan, M. Mete & T.

Loo)..

2017: Research Achievement Award., Carleton University.

2014: Provost's Fellowship in Teaching Award, Carleton University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		9		9
Articles-in-Progress (All)		1		1
Publications in Conference Proceedings (Refereed)		4		4
Paper Presentations (Refereed)		4		4
Grants - Funded (both refereed and non-refereed)		3		3
Totals		21		21

Refereed Scholarly Publications

Articles in Refereed Journals

Rojas-Mendez, J., & Khoshnevis, M. (2023). Conceptualizing nation branding: the systematic literature review. *Journal of Product and Brand Management*, 42 (1), 107-123. [A]

DOI only in 2022, published in 2023

Rojas-Mendez, J., & Davies, G. (2023). A comparison of short form Marlowe–Crowne and "best friends" social desirability bias measures. *Marketing Intelligence and Planning*. [A]

DOI only

Rojas-Mendez, J., & Davies, G. (2023). Promoting Country Image and Tourism in New or Underdeveloped Markets. *Journal of Travel Research*. [A+]

Published with DOI

Rojas-Mendez, J., Massi, M., & Gallito, E. (2022). Consumer Pandemic Animosity: Scale Development and Validation. *International Marketing Review*, 39 (6), 1417–1442. [A]

Rojas-Mendez, J., & Kolotylo, J. (2022). Why Do Russian Consumers Prefer Foreign-Made Products and Brands? *Journal of Global Marketing*, 35 (3), 208-227. [B]

Published with DOI: Published online: 16 Sep 2021

Volume assigned in 2022, article paid in 2021

Rojas-Mendez, J. (2021). Explaining People's Worry Levels During the Covid-19 Pandemic: An Analysis of Socio-Economic and Cultural Dimensions. *Frontiers in Psychology*, 12, 737917–737917. [B,Other]

Rojas-Mendez, J., & Chapa, S. (2020). X-Scale: a new scale to measure consumer xenocentrism. *Marketing Intelligence and Planning*, 38 (3), 354-368. [A]

Published 2020

Forthcoming.in 2019

Rojas-Mendez, J., Davies, G., Jamsawang, J., Sandoval-Duque, J. L., & Pipoli, G. (2019). Explaining the Mixed Outcomes from Hosting Major Sporting Events in Promoting Tourism. *Tourism Management*, 74, 300-309. [A+]

Rojas-Mendez, J., Kannan, D. R., & Ruci, L. (2019). The Japan brand personality in China: is it all negative among consumers. *Place Branding and Public Diplomacy*, 15 (2), 109-123. [B]

Banna, A. E., Papadopoulos, N., Murphy, S. A., Rod, M., & Rojas-Méndez, J. I. (2018). Ethnic identity, consumer ethnocentrism, and purchase intentions among bi-cultural ethnic consumers. *Journal of Business Research*, 82, 310-319. [A]

Rojas-Méndez, J., & Hine, M. (2018). Brand Personalities of Global Wine Exporters: A Collective Reputation Theory Perspective. *Journal of International Food & Agribusiness Marketing*, 30 (1), 88-105. [B]

Published online: 07 Nov 2017

Davies, G., Rojas-Mendez, J., Whelan, S., Mete, M., & Loo, T. (2018). Brand personality: theory and dimensionality. *Journal of Product and Brand Management*, 27 (2), 115-127. [A]

Mittelman, R., & Rojas-Mendez, J. (2018). Why Canadians give to charity: an extended theory of planned behaviour model. *International Review on Public and Nonprofit Marketing*, 15 (2), 189-204. [B]

Rojas-Méndez, J., Parasuraman, A., & Papadopoulos, N. (2017). Demographics, attitudes, and technology readiness: A cross-cultural analysis and model validation. *Marketing Intelligence and Planning*, 35 (1), 18-39. [A]

- Rojas-Méndez, J., & Davies, G. (2017). Time pressure and time planning in explaining advertising avoidance behavior. *Journal of Promotion Management*, 23 (4), 481-503. [B]
- Rojas-Méndez, J., & Hine, M. (2017). Countries' positioning personality traits: Analysis of 10 South American national tourism websites. *Journal of Vacation Marketing*, 23 (3), 233-247. [A]
- Cleveland, M., Rojas-Méndez, J. I., Laroche, M., & Papadopoulos, N. (2016). Identity, Culture, Dispositions and Behavior: A Cross-National Examination of Globalization and Culture Change. *Journal of Business Research*, 69 (3), 1090-1102. [A]
- Kara, A., Rojas-Méndez, J., & Mehmet, T. (2016). Ethical Evaluations of Business Students in an Emerging Market: Effects of Ethical Sensitivity, Cultural Values, Personality, and Religiosity. *Journal of Academic Ethics*, 14 (4), 297-325.
- Rojas-Méndez, J. I., & Parasuraman, A. (2015). Consumers' readiness to accept technology-based products and services in developing countries: the Chilean experience. *Multidisciplinary Business Review*, 8 (1), 14-24.
- Rojas-Méndez, J. I., Papadopoulos, N., & Alwan, M. (2015). Testing Self-Congruity Theory in the Context of Nation Brand Personality. *Journal of Product and Brand Management*, 24 (1), 18-27. [A]
- Rojas-Méndez, J. I., Le Nestour, M., & Rod, M. (2015). Understanding Attitude and Behaviour of Canadian Consumers toward Organic Wine. *Journal of Food Products Marketing*, 21 (4), 375-396. [B]
- Kaynak, E., & Rojas-Méndez, J. I. (2014). Predicting Tourism Market Potential of Chile by Use of a Qualitative Forecasting Technique. *International Journal of Commerce and Management*, 24 (2), 167-179. [C]
- Rojas-Méndez, J. I., Murphy, S., & Papadopoulos, N. (2013). The U.S. Brand Personality: A Sino Perspective. *Journal of Business Research*, 66 (8), 1028-1034. [A]
- Mittelman, R., & Rojas-Méndez, J. I. (2013). Exploring Consumer Motivations in Online Social Lending for Development. *Journal of Nonprofit and Public Sector Marketing*, 25 (4), 309-333. [B]
- Rojas-Méndez, J. I., & Rod, M. (2013). Chilean Wine Producer Market Orientation: Comparing MKTOR versus MARKOR. *International Journal of Wine Business Research*, 25 (1), 27-49. [B]
- Rojas-Méndez, J. I. (2013). The Nation Brand Molecule. *Journal of Product and Brand Management*, 22 (7), 462-472. [A]
- Rojas-Méndez, J. I., Papadopoulos, N., & Murphy, S. A. (2013). Measuring and Positioning Nation Brands: A Comparative Brand Personality Approach. *Corporate Reputation Review*, 16 (1), 48-65. [C]
- Li, J., Liu, F., & Rojas-Méndez, J. I. (2013). How International Students Select Offshore Programs: The Influence of Image, Attitude, Subject Norm, and Perceived Behavioral Control. *Asia-Pacific Education Review*, 14 (3), 381-390.
- Rojas-Méndez, J. I., Chaubey, M. D., & Spillan, J. E. (2013). Consumer Life Styles and Market Segmentation in Chile. *Journal of International Business Research*, 12 (2), 121-139.
- Leonard, K. M., Cosans, C., Pakdil, F., Rojas-Méndez, J. I., & Coutino-Hill, V. (2012). Cooperation Across Cultures: A 16 Country Review of the Concept. *International Journal of Intercultural Relations*, 36, 238-247. [A]
- and other country collaborators
- Rojas-Méndez, J. I., Ahmed, S. A., Claro-Riethmüller, R., & Spiller, A. (2012). Acceptance of Genetically Modified Foods with Health Benefits: A study in Germany. *Journal of Food Products Marketing*, 17 (2), 200-221. [B]
- Rojas-Méndez, J. I., & Papadopoulos, N. (2012). Argentine Consumers' Perceptions of the U.S. Brand Personality. *Latin American Business Review*, 13 (4), 329-345. [C]

Articles in Refereed Conference Proceedings

Full Paper

- Rojas-Mendez, J., Massi, M., Piancatelli, C., & Pellicelli, A. C. (2022). Checkmate To The Competition In The Metaverse: Nfts As Innovative Tools To Win Brand Engagement Through Phygital Luxury Brand Experience. *Australian and New Zealand Marketing Academy*.
- Rojas-Mendez, J., Massi, M., & Piancatelli, C. (2022). The Paradox Of Authenticity: How Social Media Influencers Manage To Keep It Authentic While Collaborating With Brands. *Australia and New Zealand Marketing Academy Conference (ANZMAC)*.
- Mittelman, R., & Rojas-Mendez, J. (2019). The Marketing of International Humanitarian Aid in a Changing Global Marketplace. *Academy of Marketing Science Annual Conference*.
May 29-31, Vancouver, Canada.
- Rojas-Mendez, J., Hine, M., & Rod, M. (2019). Country wine brand personality (CWBP): The case of French wine in Canada. *Brand Symposium*.
Brand Symposium, May 13-14, Shanghai, China.
- Rojas-Mendez, J., & Davies, G. (2018). Nation Brand Personality in the context of Mega Events. *The Future of Branding Symposium*.
- Rojas-Mendez, J., & Kotylo, J. (2018). Consumer Xenocentrism in Russia: Analysis of a Moderator and Consequences. *Academy of Business and Emerging Markets (ABEM) Conference*.
Aug 1-3, Manila, Philippines.
- Rojas-Méndez, J., Kannan, D., & Ruci, L. (2017). Have Chinese consumers forgiven Japan? A Nation Brand Personality approach. *Global Brand Conference*.

April 27-29, Kalmar, Sweden

Rojas-Méndez, J., Hine, M., & Rod, M. (2017). Brand Personalities of Global Wine Exporters: A Collective Reputation Theory Perspective. *International Food Marketing Research Symposium*.

Proceedings of the International Food Marketing Research Symposium, Dubrovnic, Croatia, June 15-17

Mittelman, R., & Rojas-Méndez, J. (2017). Why Canadians Give to Charity: An Extended Theory of Planned Behaviour Model. *International Congress on Public and Nonprofit Marketing*.

September 4-6, Badajoz, Spain

Rojas-Méndez, J., & Chapa, S. (2017). What is Xenocentrism? A Scale Proposal Xscale for Measuring its Consumer and Social Dimensions. *Academy of International Business (AIB) Annual Meeting*.

July 1-5, Dubai, UAE

Rojas-Méndez, J., & Chapa, S. (2016). Rescuing Xenocentrism: the missing construct in consumer behavior. *Academy of Marketing Science (AMS) Annual Conference*.

May 18-21, 2016, Orlando, Florida

Mittelman, R., & Rojas-Méndez, J. (2016). Charitable Giving to Distant Others. *Association for Nonprofit and Social Economy Research (ANSER-ARES)*.

June 1-3, 2016, Calgary, Alberta.

Rojas-Méndez, J., Rod, M., & Hine, M. (2016). What's Your Oenotype?: Global Wine Consumers' Perceptions of Country-wine Personalities. *Global Brand Conference*.

Bradford, England - April 27-29.

Davies, G., Rojas-Méndez, J., Whelan, S., Mete, M., & Loo, T. (2016). The Dimensions of Brand Image and Personality. *Academy of Marketing Conference*.

Northumbria University, July 5-7, New Castle, England.

Papadopoulos, N., El Banna, A., Murphy, S. A., Rojas-Méndez, J. I., & Rod, M. (2015). Old Country Passions: Animosity, Affinity, and Purchase Intentions among Ethnic Consumers. *Academy of Marketing Science (AMS) World Marketing Congress*.

July 14 - 18, 2015, Bari, Italy.

Rojas-Méndez, J., Jamsawang, J., & Pipoli, G. M. (2014). Beliefs, global attitude and acceptance of comparative advertising: Etic dimensions for cross-cultural research. *Global Marketing Conference*.

July 15-18, 2014, Singapore.

Rojas-Méndez, J. I., Papadopoulos, N., & Alwan, M. (2014). Testing Self-Congruity Theory in the Context of Nation Brand Personality. *Global Brand Conference*.

April 9 - 11, 2014, Hatfield, Herfordshire, UK.

Rojas-Méndez, J., & Davies, G. (2014). Time pressure and time planning in explaining advertising avoidance behavior. *European Marketing Academy Conference (EMAC)*.

June 3-6, 2014, Valencia, Spain.

Davies, G., Rojas-Méndez, J., Whelan, S., & Loo, T. (2014). The personification approach: universal dimensions of warmth, competence and status. *CIARG conference*.

September 5-7, 2014, VU University, Amsterdam, The Netherlands.

Robertson, C., Rojas-Méndez, J., Pipoli, G., Buitrago, R., & Lucianetti, L. (2014). Perceptions of country image and product marketing: a study of wine brands from Chile and Argentina. *Academy of Marketing Science (AMS) World Marketing Congress*.

August 5-8, 2014, Lima, Peru.

Rojas-Méndez, J., & Hine, M. J. (2014). South American countries' positioning on personality traits: Analysis of 10 national tourism websites. *Global Marketing Conference*.

July 15-18, 2014, Singapore.

Rojas-Méndez, J. I., Le Nestour, M., & Rod, M. (2013). Understanding Attitude and Behavior of Canadian Consumers toward Organic Wine. *International Food Marketing Research Symposium*.

June 20-21, 2013, Budapest, Hungary.

Rojas-Méndez, J. (2013). The Nation Brand Molecule. *Global Brand Conference*.

April 3-5, 2013, Universidade Catolica de Porto, Porto, Portugal.

Rojas-Méndez, J. I., Papadopoulos, N., & Alwan, M. (2012). Human Personality and Nation Brand Personality: Are They Related? *Global Marketing Conference*.

July 19 - 22, 2012, Seoul, South Korea.

Rojas-Méndez, J. I., Alwan, M., & Papadopoulos, N. (2012). The Relationship between Individual Cultural Values (ICV) and Nation Brand Personality (NBP) Traits. *Academy of International Business (AIB) Annual Meeting*.

June 30 - July 3, 2012, Washington, D.C.

Rojas-Méndez, J. I., & Papadopoulos, N. (2011). The U.S. Brand Personality Seen Through the Lens of Argentine Consumers. *Annual Conference*

of Consejo Latinoamericano de Escuelas de Administración (CLADEA).

October 20 - 23, 2011. San Juan, Puerto Rico.

Rojas-Méndez, J. I., & Rod, M. (2011). The Market Orientation of Chilean Wine Producers: A Comparison of MKTOR versus MARKOR. *Australia and New Zealand Marketing Academy Conference (ANZMAC)*.

November 28-30, 2011. Perth, Australia.

Mittelman, R., & Rojas-Méndez, J. (2011). Exploring Consumer Motivation in Online Social Lending for Development. *Academy of Marketing Science (AMS) World Marketing Congress*.

July 19-23, 2011. Reims Management School. Reims, Champagne, France.

Belbaux, V., Guibert, N., & Rojas-Méndez, J. (2010). Segmentation internationale du marché: une réévaluation dans le secteur du vin. *International Conference Marketing Trends*.

January 21-23, 2010. Venice, Italy.

Cleveland, M., Rojas-Méndez, J. I., Laroche, M., & Papadopoulos, N. (2010). Globalization, Identity, Culture and Consumer Behavior: A Cross-Cultural Study of Chilean and Canadian Consumers. *Academy of Marketing Science (AMS) Annual Conference*.

July 21 - 24, 2010. Lille, France.

Rojas-Méndez, J. I., Murphy, S., & Papadopoulos, N. (2010). The U.S. Brand Personality: A Sino Perspective. *Global Marketing Conference*.

September 9 - 12, 2010. Tokyo, Japan.

Kaynak, E., & Rojas-Méndez, J. (2010). Use of Qualitative Forecasting Technique for the Measurement of Country Tourism Market Potential. *International Academy of Business and Public Administration Disciplines (IABPAD) Conference*.

April 8-10, 2010. Las Vegas, Nevada.

Abstract Only

Papadopoulos, N., Reid, J., Rod, M., & Rojas-Méndez, J. (2015). Place-Brand Associations in International Branding and Advertising: What Managers Think. *International Colloquium on Branding, Athens Institute for Education and Research*.

July 27 - 30, 2015. Athens, Greece. 28.

El Banna, A., Papadopoulos, N., Murphy, S. A., Hamzaoui-Essoussi, L., & Rojas-Méndez, J. I. (2015). Ethnic Consumer Views of Friends and Foes 'Back Home': Place Images, Affinity, Animosity, and Purchase Intentions. *Administrative Sciences Association of Canada (ASAC)*.

June 13 - 16, 2015. Halifax, Nova Scotia.

El Banna, A., Papadopoulos, N., Murphy, S. A., Rojas-Méndez, J., & Rod, M. (2015). Ethnic identity, consumer ethnocentrism, and purchase intentions among bi-cultural ethnic consumers: 'Divided loyalties' or 'dual allegiance'? *Royal Bank International Research Seminar*.

September 24 - 26, 2015. Montreal, QC.

Cleveland, M., Rojas-Méndez, J. I., Laroche, M., & Papadopoulos, N. (2013). Identity, Culture, Dispositions and Behavior: A Cross-National Examination of Globalization and Culture Change. *Royal Bank International Research Seminar*.

September 26 - 28, 2013. Montreal, QC, Canada.

Papadopoulos, N., Hamzaoui-Essoussi, L., & Rojas-Méndez, J. I. (2011). Consumer Animosity: A Comparative Perspective. *Academy of Marketing Science (AMS) Annual Conference*.

In *Developments in Marketing Science*, vol. XXXIV (Coral Gables, FL: Academy of Marketing Science; May 24-27).

Chapters in Edited Books

Papadopoulos, N., Rod, M., Reid, J., & Rojas-Méndez, J. (2017). Place-based International Brand Communications: An Exploratory Study of Managers' Views. In J. Aldás-Manzano, C. Ruiz-Mafé, and C. Veloutsou (Eds.), *Communicating brands in an increasingly digital environment* (pp. 43-56). Athens, Greece: Athens Institute for Education and Research. [Status: Published]

Description: (Eds; names listed alphabetically, Athens Institute for Education and Research (Athens, Greece))

Papadopoulos, N., Hamzaoui-Essoussi, L., & Rojas-Méndez, J. (2016). From Nation to Neighbourhood: Branding and Marketing Places. *The Routledge Companion to Contemporary Brand Management*. Routledge. [Status: Published]

Description: Francesca Dall'Olmo Riley, Jaywant Singh, and Charles Blankson (eds.). New York, NY

El Banna, A., Papadopoulos, N., Murphy, S. A., Rojas-Méndez, J., & Rod, M. (2016). Animosity, Affinity, and Purchase Intentions Among Ethnic Consumers. *Rediscovering the Essentiality of Marketing* (pp. 713-727). Springer Publications. [Status: Published]

Description: *Rediscovering the Essentiality of Marketing*. Proceedings of the 2015 Academy of Marketing Science (AMS) World Marketing Congress, Petruzzellis, Luca, Winer, Russell S. (Eds.) (pp. 713-727). Springer International Publishing. *(re-printed in book form version of #6 in peer-reviewed conference proceedings/papers).

Rojas-Méndez, J. I. (2014). Diferencias en el comportamiento del consumidor internacional: Canadá versus Colombia [Differences in international consumer behavior: Canada versus Colombia]. In Edgar Vieira Posada (Ed.), *Nuevo escenario para el comercio y la inversión* (pp. 93-124). Bogotá, Colombia: Editorial CESA. [Status: Published]

Papadopoulos, N., el Banna, A., Murphy, S., & Roja-Mendez, J. I. (2011). Place brands and Brand-Place Associations: The Role of 'Place' in International Marketing. In Subhash Jain and David A. Griffith (Eds.), *Handbook of Research in International Marketing*, 2nd ed. (pp. 88-116). Northampton, MA: Edward Elgar Publishing. [Status: Published]

Other (Non-refereed) Scholarly Publications

Chapters in non-refereed books

Rojas-Méndez, J., Cateora, P., Papadopoulos, N., & Graham, J. (2011). Case: Productos Fernandez S.A. (revised version). *International Marketing* (pp. 594-597). McGraw-Hill Ryerson.

Description: 3rd Canadian Edition, Philip R. Cateora, Nicolas Papadopoulos and John L. Graham

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Academic PRJ

2008 – 2024: Multidisciplinary Business Review (International). Editor-in-Chief

Editor: Associate Editor

2024: Journal of Global Marketing (International). Associate Editor (South America)

2017 – 2024: European Journal of Management and Business Economics (International). 2020- Present Associate Editor – Marketing

2017- 2020 Associate Editor – International Management

Presentations

Papers Presented at Conferences

Refereed

Rojas-Mendez, J., Zeidabadi, G., & Ibanez, M. (2023). *Cross-Cultural Conundrum: Unveiling Consumer Xenocentrism's Impact on Product Preference and Counterfeit Proneness*. Cross Cultural Research Conference, Panama City, Panama.

Rojas-Mendez, J., Hine, M., & Rob, M. (2023). *How French wine personality influences Canadian consumers' purchase decisions?* Academy of International Business Conference, Warsaw, Poland.

Massi, M., Piancatelli, C., & Rojas-Mendez, J. (2022). *The Paradox Of Authenticity: How Social Media Influencers Manage To Keep It Authentic While Collaborating With Brands*. Australia and New Zealand Marketing Academy Conference (ANZMAC), Perth, Australia.

Massi, M., Piancatelli, C., Rojas-Mendez, J., & Pellicelli, A. C. (2022). *Checkmate To The Competition In The Metaverse: Nfts As Innovative Tools To Win Brand Engagement Through Phygital Luxury Brand Experience*. Australian and New Zealand Marketing Academy, Perth, Australia.

Rojas-Mendez, J. & Davies, G. (2018). *Nation Brand Personality in the context of Mega Events*. The Future of Branding Symposium, Seoul, Republic of Korea.

Description: April 30 – May 2, Seoul, South Korea.

Rojas-Méndez, J., Hine, M., & Rod, M. (2017). *Brand Personalities of Global Wine Exporters: A Collective Reputation Theory Perspective*. International Food Marketing Research Symposium, Dubrovnik, Croatia.

Description: June 15-16

Rojas-Méndez, J. & Chapa, S. (2017). *What is Xenocentrism? A Scale Proposal Xscale for Measuring its Consumer and Social Dimensions*. Academy of International Business (AIB) Annual Meeting, Dubai, United Arab Emirates.

Description: July 1-5

Rojas-Méndez, J., Kannan, D., & Ruci, L. (2017). *Have Chinese consumers forgiven Japan? A Nation Brand Personality approach*. Global Brand Conference, Kalmar, Sweden.

Rojas-Méndez, J., Rod, M., & Hine, M. (2016). *What's Your Oenotype?: Global Wine Consumers' Perceptions of Country-wine Personalities*. Global Brand Conference, Bradford, United Kingdom.

Rojas-Méndez, J. & Hine, M. (2014). *South American countries' positioning on personality traits: Analysis of 10 national tourism websites*. Global Marketing Conference, Singapore, Singapore.

Rojas-Méndez, J., Papadopoulos, N., & Alwan, M. (2014). *Testing self-congruity theory in the context of nation brand personality*. Global Brand Conference, Hatfield, United Kingdom.

Description: April 9-11

Rojas-Méndez, J., Jamsawang, J., & Pipoli, G. M. (2014). *Beliefs, global attitude and acceptance of comparative advertising: Etic dimensions for cross-cultural research*. Global Marketing Conference, Singapore, Singapore.

Description: July 15-18

Rojas-Méndez, J. & Davies, G. (2014). *Time pressure and time planning in explaining advertising avoidance behavior*. European Marketing Academy Conference (EMAC), Valencia, Spain.

Description: June 3-6

Rojas-Méndez, J. (2013). *The Nation Brand Molecule*. Global Brand Conference, Porto, Portugal.

Rojas-Méndez, J., Papadopoulos, N., & Alwan, M. (2012). *Human personality and nation brand personality: are they related?* Global Marketing Conference, Seoul, Republic of Korea.

Description: July 19-22

Rojas-Méndez, J. & Rod, M. (2011). *The Market Orientation of Chilean Wine Producers: A Comparison of MKTOR Versus MARKOR*. Australian & New Zealand Marketing Academy (ANZMAC) Conference, Perth, Australia.

Description: November 28-30

Rojas-Méndez, J. & Papadopoulos, N. (2011). *The U.S. Brand Personality Seen Through the Lens of the Argentine Consumers*. Latin American Council of Management Schools (CLADEA) Annual Conference, San Juan, Puerto Rico.

Description: October 20-23

Rojas-Méndez, J., Murphy, S., & Papadopoulos, N. (2010). *The U.S. Brand Personality: A Sino Perspective*. Global Marketing Conference, Tokyo, Japan.

Description: September 9-12

Other Presentations

Invited Lecture

2018: Universidad del Sinú, Montería, Bogota, Medellín, Colombia. "Calidad de servicio para el éxito [service quality for success]", conference for University staff at Universidad del Sinú, Montería, Colombia, and Universidad Cooperativa de Colombia, Medellín and Bogota, Colombia

2018: University of Chester, Chester, United Kingdom. "Brazil's Brand Image and the 2014 World Cup: Antecedents and Contextual Effects", conference for faculty and doctoral students at University of Chester

2018: University of Chester, Chester, United Kingdom. "The impact of culture on people's behavior", conference for students at University of Chester

Keynote Address

2023: Congreso Internacional de Ciencias Administrativas, Mexico City, Mexico. Xenocentrismo del consumidor: ¿qué es y por qué es importante?

2023: Academy of Latin American Business and Sustainability Studies, Santo Domingo, Dominican Republic. Global allure: Winning the hearts of xenocentric Consumers

2010: Research Works Comes to Life Luncheon, Ottawa, Canada-Ontario. "Canada's Brand Personality: A Sino Perspective", Carleton University, Ottawa, Canada. Invited speaker at at Research Works Comes to Life Luncheon (April)

Presentation

2023: Sprott Research Seminar. Why is consumer xenocentrism key to globalization? Research Seminar at Sprott School of Business

2023: Conferencia magistral VII Encuentro Nacional y V Internacional de Profesores e Investigadores en Mercadotecnia, Acapulco, Mexico. Xenocentrismo del consumidor

2023: Woxen University, Hyderabad, India. Discover the magic of consumer xenocentrism and empower yourself as a global visionary

2022: Chilean Association of Business Schools, La Serena, Chile. ¿Cómo publicar en revistas científicas de alto impacto? Conference for the annual conference of the Chilean Association of Business School (ASFAE) at Universidad de La Serena, La Serena, Chile (November).

2021: Universidad Santo Tomas, Talca, Chile.

2021: Universidad de Manizales, Manizales, Colombia.

2021: Woxsen University at The Global Partners Meet Event, Hyderabad, India.

2021: Universidad Cooperativa de Colombia, Bogota, Colombia.

2021: Escuela Bancaria y Comercial, Mexico City, Mexico-Federal District (Mexico City).

2020: Universidad Panamericana. "How high educational system boost economic growth", virtual conference for Universidad Panamericana, Colombia (July).

2020: Colombian Association of Business Faculties, Bogota, Colombia. "Top 10 reasons for rejecting articles", Virtual Conference at the ASCOLFA (Colombian Association of Business Faculties) annual meeting, Bogota, Colombia (August).

2019: ASCOLFA (Colombian Association of Business Faculties), Bogota, Colombia. "Academic research in times of big data and artificial intelligence", Conference at the ASCOLFA (Colombian Association of Business Faculties) annual meeting, Bogota, Colombia.

2019: Agriculture and Agri-Food Canada, Ottawa, Canada-Ontario. "Measuring and Positioning Canada Brand in China", Conference at the Agriculture and Agri-Food Canada", Ottawa, Canada.

2014: Universidad de San Andres, Buenos Aires, Argentina. "Marca-país como eje para el desarrollo de ventajas competitivas" [Nation brand as axis for development of competitive advantages], Conference for general public at Universidad de San Andres, Buenos Aires, Argentina (June).

2014: Universidad del Pacífico, Lima, Peru. "Using the Personality Metaphor to Measure and Position Nation Brands", Conference at Universidad del Pacífico

2014: Universidad del Pacífico, Lima, Peru. "Using the Personality Metaphor to Measure and Position Nation Brands", Conference at Universidad del Pacífico

2013: University of Vienna, Vienna, Austria. "Using the Personality Metaphor to Measure and Position Nation Brands", Doctoral Seminar at University of Vienna, Austria (April)

2013: Universidad del Pacífico, Lima, Peru. "Using the Personality Metaphor to Measure and Position Nation Brands", Conference at Universidad

del Pacífico, Lima, Peru (August).

2011: ESPAE Graduate School of Management, Guayaquil, Ecuador. "Personality traits as an indicator of country perceptions in international markets", ESPAE, Guayaquil, Ecuador (April).

2011: CESA, Bogota, Colombia. "Tertulia sobre Investigacion Academica y Publicaciones [workshop on academic research and publications]", CESA, Bogota, Colombia (August).

2011: Universidad Sergio Arboleda, Bogota, Colombia. "Personalidad Marca País: Su impacto en el posicionamiento internacional y la competitividad [Nation Brand Personality: Its impact on international positioning and competitiveness]", Universidad Sergio Arboleda, Bogota, Colombia (Noviembre).

2010: ESPAE Graduate School of Management, Guayaquil, Ecuador. "Personalidad de la Marca Estados Unidos en Ecuador" [The U.S. Brand Personality in Ecuador], ESPAE, Guayaquil, Ecuador, (April).

Contract or Other Research

Research Grants and Awards

Grants

2024 [Year 2 of 2]: Rojas-Mendez, J. Partnership Engage Grant (\$12,500.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 1 of 2]: Rojas-Mendez, J. Partnership Engage Grant (\$12,500.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2021 [Year 2 of 2]: Rojas-Mendez, J. Insight Development Grant (\$21,898.00 of a total grant amount of \$43,795.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020 [Year 1 of 2]: Rojas-Mendez, J. Insight Development Grant (\$21,898.00 of a total grant amount of \$43,795.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018: Rojas-Mendez, J. Research Achievement Award (\$15,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2015: Rojas-Mendez, J. Research Achievement Award (\$15,000.00 Not Funded), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board Member: PRJ Editorial Review Board

2019: Journal of Global Scholars of Marketing Science: Bridging Asia and the World (JGSMS).

2016 – 2017: International Journal of Advertising.

2014 – 2017: Journal of Product & Brand Management.

2013 – 2017: Journal of Food Product Marketing.

2011 – 2017: Incae Business Review.

2015 – 2016: International Journal of Advertising.

2015: International Journal of Advertising.

Chair: Conference / Track / Program

2014: Academy of Marketing Science (AMS) World Marketing Congress, Lima, Peru. Chair of the International Marketing Track

2014: Hispanic/Latino Media & Marketing International Conference, Tallahassee, Florida. Chair of the Advertising Track

2011: Academy of Marketing Science (AMS) World Marketing Congress, Champagne, France. Chair of the Global Marketing Track

2010: Academy of Marketing Science Cultural Perspectives in Marketing, Lille, France. Co-Chair of Marketing Strategy Across Cultures Track

Invited Lecture

2018: Universidad del Sinú, Monteria, Bogota, Medellin, Colombia. "Calidad de servicio para el éxito [service quality for success]", conference for University staff at Universidad del Sinú, Montería, Colombia, and Universidad Cooperativa de Colombia, Medellín and Bogota, Colombia

2018: University of Chester, Chester, United Kingdom. "Brazil's Brand Image and the 2014 World Cup: Antecedents and Contextual Effects", conference for faculty and doctoral students at University of Chester

2018: University of Chester, Chester, United Kingdom. "The impact of culture on people's behavior", conference for students at University of Chester

Keynote Address

2023: Congreso Internacional de Ciencias Administrativas, Mexico City, Mexico. Xenocentrismo del consumidor: ¿qué es y por qué es importante?

2023: Academy of Latin American Business and Sustainability Studies, Santo Domingo, Dominican Republic. Global allure: Winning the hearts of

xenocentric Consumers

2010: Research Works Comes to Life Luncheon, Ottawa, Canada-Ontario. "Canada's Brand Personality: A Sino Perspective", Carleton University, Ottawa, Canada. Invited speaker at at Research Works Comes to Life Luncheon (April)

Other Professional Service Activities

2023: UCSC, Concepcion, Chile. Comprendiendo el xenocentrismo del consumidor: ¿qué es y por qué es importante?, Inaugral class at the Faculty of Economics and Administration.

2023: Universidad de la Frontera, Temuco, Chile. External examiner for research project submitted to "Universidad de la Frontera"

2022: South Africa's National Research Foundation (NRF).. External examiner for the South Africa's National Research Foundation (NRF).

2022: Science Fund of the Republic of Serbia. Referee for Research Proposals Evaluation, Science Fund of the Republic of Serbia

2021: Agencia Nacional de Evaluación y Acreditación de la Educación Superior of Paraguay. External reviewer for the " Agencia Nacional de Evaluación y Acreditación de la Educación Superior of Paraguay - ANEAES", to evaluate a university program in the field of marketing.

2021: Agencia Nacional de Evaluación y Acreditación de la Educación Superior of Paraguay. International Consultant of the " Agencia Nacional de Evaluación y Acreditación de la Educación Superior of Paraguay - ANEAES", to evaluate new university or college degree programs in the field of marketing.

2020: South African National Research Foundation. Invited Referee for the South African National Research Foundation.

2020: Swiss National Science Foundation. Invited Referee for Research Proposals Evaluation, Swiss National Science Foundation

Reviewer: Ad Hoc Reviewer for a Journal

2023: Academy of International Business Conference, Warsaw, Poland.

2020: Journal of Retailing and Consumer Services.

2020: Place Branding and Public Diplomacy.

Reviewer: Conference Paper

2016: Academy of International Business (AIB) Annual Meeting, Dubai, United Arab Emirates.

2015 – 2016: Global Brand Conference, Kalmar, Sweden.

2012: Academy of International Business (AIB) Annual Meeting, D.C., Washington.

2011: Academy of Marketing Science (AMS) Annual Conference, Coral Gables, Florida.

2010: Administrative Sciences Association of Canada (ASAC).

2010: Sprott PhD Symposium, Ottawa, Canada-Ontario.

2010: Global Marketing Congress, Tokyo, Japan.

Scholarly Work in Progress

Working Papers

Dionisi, A. & Rojas-Mendez, J. (2019). "Gender, personality and unethical negotiating behaviour."

Reid, J., Papadopoulos, N., Rod, M., & Rojas-Méndez, J. (2018). "Place-Brand Associations in International Branding and Advertising: What Managers Think."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI3706	International Business Negotiations	0.5	56	Main	100%
2024/Winter	BUSI4205	International Marketing	0.5	48	Main	100%
2023/Fall	BUSI4205	International Marketing	0.5	47	Main	100%
2023/Fall	BUSI3705	International Buyer Behaviour	0.5	31	Main	100%
2023/Winter	BUSI4205	International Marketing	0.5	48	Main	100%
2023/Winter	BUSI3706	International Business Negotiations	0.5	54	Main	100%
2022/Fall	BUSI4205	International Marketing	0.5	38	Main	100%
2022/Fall	BUSI3705	International Buyer Behaviour	0.5	20	Main	100%
2022/Winter	BUSI4205	International Marketing	0.5	50	Main	100%

2022/Winter	BUSI3706	International Business Negotiations	0.5	60	Main	100%
2021/Fall	BUSI4205	International Marketing	0.5	50	Main	100%
2021/Fall	BUSI3705	International Buyer Behaviour	0.5	30	Main	100%
2021/Winter	BUSI4205	International Marketing	0.5	49	Main	100%
2021/Winter	BUSI3706	International Business Negotiations	0.5	73	Main	100%
2020/Fall	BUSI4205	International Marketing	0.5	40	Main	100%
2020/Fall	BUSI3705	International Buyer Behaviour	0.5	43	Main	100%
2020/Winter	BUSI3706	International Business Negotiations	0.5	60	Main	100%
2020/Winter	BUSI3705	International Buyer Behaviour	0.5	43	Main	100%
2019/Fall	IBUS5711	International Market & Trade	0.25	18	Bogota	100%
2019/Fall	BUSI4205	International Marketing	0.5	49	Main	100%
2019/Summer	IBUS5714	Buyer Behaviour in International Markets	0.25	43	Shanghai	100%
2019/Summer	IBUS5713	Doing Business in the U.S.	0.25	15	Bogota	100%
2018/Fall	IBUS5714	Buyer Behaviour in International Markets	0.25	29	Shanghai	100%
2018/Fall	IBUS5714	Buyer Behaviour in International Markets	0.25	19	Shanghai	100%
2018/Summer	IBUS5711	International Market & Trade	0.25	23	Bogota	100%
2018/Summer	IBUS5713	Doing Business in the U.S.	0.25	26	Bogota	100%
2018/Winter	BUSI3706	International Business Negotiations	0.23	24	Main	44%
2018/Winter	BUSI3705	International Buyer Behaviour	0.15	12	Main	31%
2018/Winter	IBUS5714	Buyer Behaviour in International Markets	0.25	6	Main	100%
2018/Winter	BUSI3705	International Buyer Behaviour	0.35	27	Main	69%
2018/Winter	BUSI3706	International Business Negotiations	0.27	31	Main	56%
2017/Fall	IBUS5711	International Market & Trade	0.25	9	Bogota	100%
2017/Fall	IBUS5714	Buyer Behaviour in International Markets	0.25	41	Shanghai	100%
2017/Fall	IBUS5711	International Market & Trade	0.25	41	Shanghai	100%
2017/Summer	IBUS5713	Doing Business in the U.S.	0.25	15	Bogota	100%
2017/Winter	IBUS5714	Buyer Behaviour in International Markets	0.25	17	Main	100%
2017/Winter	BUSI3705	International Buyer Behaviour	0.5	52	Main	100%
2017/Winter	BUSI3706	International Business Negotiations	0.5	59	Main	100%
2017/Winter	IBUS5711	International Market & Trade	0.25	1	Shanghai	100%
2017/Winter	IBUS5716	Management of International Business	0.25	28	Shanghai	100%
2016/Summer	IBUS5711	International Market & Trade	0.25	21	Bogota	100%
2016/Summer	IBUS5711	International Market & Trade	0.25	31	Shanghai	100%
2016/Summer	IBUS5714	Buyer Behaviour in International Markets	0.25	29	Shanghai	100%
2016/Summer	IBUS5714	Buyer Behaviour in International Markets	0.25	30	Shanghai	100%
2016/Summer	IBUS5713	Doing Business in the U.S.	0.25	26	Bogota	100%
2016/Summer	IBUS5711	International Market & Trade	0.25	28	Shanghai	100%

2016/Winter	BUSI3706	International Business Negotiations	0.26	31	Main	53%
2016/Winter	BUSI3705	International Buyer Behaviour	0.28	14	Main	56%
2016/Winter	BUSI3706	International Business Negotiations	0.24	28	Main	47%
2016/Winter	IBUS5711	International Market & Trade	0.25	33	Shanghai	100%
2016/Winter	IBUS5714	Buyer Behaviour in International Markets	0.25	33	Shanghai	100%
2016/Winter	IBUS5714	Buyer Behaviour in International Markets	0.25	20	Main	100%
2016/Winter	BUSI3705	International Buyer Behaviour	0.22	11	Main	44%
2015/Fall	BUSI3705	International Buyer Behaviour	0.28	11	Main	55%
2015/Fall	BUSI3705	International Buyer Behaviour	0.23	9	Main	45%
2015/Summer	IBUS5713	Doing Business in the U.S.	0.25	25	Bogota	100%

Service to the institution (Academic)

University Assignments

PhD. Comprehensive Committees:

2023-2024: Golnoush Zeidabadi

2023-2024: Hadiseh Alhoda Mohammadzadeh

PhD. Thesis Committees:

2021-2022: Davydenko, Mariya, Psychology

External Committees

Thesis Assignments

Masters Thesis Committees:

2012-2013: Supervisor, Manon Le Nestour

Thesis Assignments

PhD. Thesis Committees:

2022-2023: External, Sujit Kumar Ray

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Professional Memberships

Academy of International Business (AIB), N/A

Academy of Management (AoM), N/A

Academy of Marketing Science (AMS), N/A

Administrative Sciences Association of Canada (ASAC), N/A

American Marketing Association (AMA), N/A

Australia and New Zealand Academy of Marketing (ANZMAC), N/A

Business Association for Latin American Studies (BALAS), N/A

European Marketing Academy (EMAC), N/A

Korean Academy of Marketing Science (KAMS), N/A

Executive or Professional Education

2019 - "How to write papers to publish in academic journals". Workshop for Faculty members at ESPAE Graduate School of Management, Guayaquil, Ecuador.

[Activity: Delivery of Professional Education]

2019 - "How to write papers to publish in academic journals". Workshop for Faculty members at Universidad de La Serena, La Serena, Chile. [Activity: Delivery of Professional Education]

2018 - "How to write papers to publish in academic journals". Workshop for Faculty members at Universidad Cooperativa de Colombia, Bogota, Colombia.

[Activity: Delivery of Professional Education]

2017 - "How to write academic papers to publish in reputed journals", Workshop for Faculty members. Workshop for Faculty members (ASCOLFA), Bogota, Colombia. [Activity: Delivery of Professional Education]

2016 - "How to write academic papers to publish in reputed journals", Workshop for Faculty members. Universidad del Pacifico, Lima, Perú [Activity: Delivery of Professional Education]

Skills

Languages

- English – Full proficiency (read/write/speak) • Spanish – Full proficiency (read/write/speak)

Curriculum Vitae - Sprott School of Business

Katherine Ruff, PhD
Assistant Professor - Tenured,
Sprott School of Business (Accounting)
Telephone: 613-520-2600 x8074
Email: kate.ruff@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
Orcid: <https://orcid.org/0000-0003-2814-8923>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. York University.

Title: *Materializing Performance: The interplay of inscriptions, expertise and visuality in the fabrication of an accounting artifact*. Advisor: Dean Neu

Master of Science. London School of Economics.

Title: *What private sector financial markets can teach the voluntary and public sectors about measuring the impact of organizations delivering social services*. Advisor: Eileen Munro

Bachelor of Commerce. McGill University.

Title: *Great Distinction, Dean's Honor List*.

B. EMPLOYMENT

Academic Appointments

Associate Professor, Accounting, Sprott School of Business, Carleton University (2022 - Present), Ottawa, Canada-Ontario.

Assistant Professor, Accounting, Sprott School of Business, Carleton University (2016 - 2022), Ottawa, Canada-Ontario.

Other Employment

Project Manager (part-time, volunteer), Charity Intelligence (Ci) Canada (2011 - 2013), Toronto, Canada. Developed methods of assessing charity nonfinancial disclosures.

Social Enterprise Analyst, Charity Intelligence (Ci) Canada (2008 - 2011), Toronto, Canada. Launched Social Enterprise portfolio.

Social Enterprise Consultant, K. Ruff Consultancy (2004 - 2007), Toronto, Canada. Clients included: Social Enterprise London, United Way of Toronto, CECI. Advised on program development, monitoring and evaluation.

Social Enterprise Advisor / Program Manager, CECI (Centre d'etudes et de cooperation internationale) (2002 - 2004), Kathmandu, Nepal. Responsible for developing double bottom-line programs.

C. PROFESSIONAL HONOURS

2020: Commendation, AAAJ Literati Awards.

2020: Impact & Sustainable Finance Faculty Consortium, Kellogg School of Management and Rockefeller Foundation. This convening is invitation-only and is restricted to those who teach courses in impact investing and sustainable finance at the university level..

2019: Impact & Sustainable Finance Faculty Consortium, Kellogg School of Management and Rockefeller Foundation. This convening is invitation-only and is restricted to those who teach courses in impact investing and sustainable finance at the university level..

2015: Award for Research in Social Innovation, Stone Soup Consulting.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		4		4
Articles-in-Progress (All)	1	3		4
Publications in Conference Proceedings (Refereed)		1		1
Paper Presentations (Refereed)		1		1
Research Report, Non-Refereed		2		2
Grants - Funded (both refereed and non-refereed)		22		22

Grants - Pending (both refereed and non-refereed)		4		4
Other Research, Non-refereed		2		2
Totals	1	39		40

Refereed Scholarly Publications

Articles in Refereed Journals

Ruff, K., Nappert, P. L., & Graham, C. (2022). Impact valuations in social finance: emic and polyvocal stakeholder accounts". *Accounting Auditing and Accountability Journal*, 36 (1), 295-322. [A+]

Ruff, K. (2021). How Impact Measurement Devices Act: The performativity of Theory of Change, SROI and dashboards. *Qualitative Research in Accounting and Management*, 18 (3), 332-360. [B]

Ruff, K. (2021). In support of making up users. *Critical Perspectives on Accounting*. [A]
Published with DOI

Ruff, K., & Himick, D. (2019). Counter accounts of profit: outrage to action through. *Accounting Auditing and Accountability Journal*, 33 (4), 699-726. [A+]

(Flagged as Forthcoming in 2018) Publication date: 3 July 2019 (Flagged as forthcoming in 2019), flagged as published in 2020

Ruff, K., & Olsen, S. (2018). The Need for Analysts in Social Impact Measurement: How Evaluators Can Help. *American Journal of Evaluation*, 39 (3), 402-407. [C]

First published online: July 13, 2018; Issue published: September 1, 2018

Articles in Refereed Conference Proceedings

Full Paper

Ruff, K. (2022). Indigenous Approaches to Impact Measurement: A systematic literature review. *Centre for Social and Environmental Accounting Research*.

Chapters in Edited Books

Ruff, K. (2019). Performance Measurement. In Press, In Susan Phillips and Bob Wyatt (Eds.), *Intersections and Innovations: Change for Canada's Voluntary and Nonprofit Sector*. [Status: InPress]

Ruff, K. (2019). Impact Measurement Standards: why, how, and how not. In Press, In Baehler, K and Straussman, J (Eds.), *The Oxford International Handbook of Public Administration for Social Policy: Promising practices and emerging challenges*. [Status: InPress]

Ruff, K. (2013). The Role of Intermediaries in Social Accounting: Insights from effective transparency systems. In Mook, L. (Ed.), *Accounting for Social Value*. University of Toronto Press. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Scholarly Publications

2016: Ruff, K., *The next frontier in impact measurement isn't measurement at all: why we need skilled analysts to improve social capital markets*. Stanford Social Innovation Review. May 10, 2016 Top 10 most popular articles of the 2016s To date (01/03/2017): 14,529 page views; 12,954 unique page views

2013: Ruff, K., Thomson, G., & Young, Z., *Social Results Reporting: How Canadian charities report their social impact*. Charity Intelligence. March 2013

Other Publications

Newspaper Articles or Columns

2014: Ruff, K., & Nicholls, J., *Taking Account of Moral Issues*. CA Magazine. May 29, 2014

Other Publications

2020: Ruff, K., *Performance Measurement*. "Performance Measurement" in *Intersections and Innovations: Change for Canada's Voluntary and Nonprofit Sector* Edited by Susan Phillips and Bob Wyatt. Forthcoming in 2020.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Ruff, K. (2022). *Indigenous Approaches to Impact Measurement: A systematic literature review*. Centre for Social and Environmental Accounting Research, Toronto, Canada-Ontario.

Ruff, K. (2018). *Making SDG Indicators relevant to individual organizations: A pilot program with social enterprises in Canada*. Accounting, Auditing & Accountability Journal SDG, Fife, Scotland.

Description: University of St. Andrews, Scotland, August 31, 2018. Paper was accepted but author was unable to attend

- Ruff, K. (2018). *Revaluing Autistic People in the Labour Market: devices and how they navigate valuation dissonance*. Alternative Accounts, Montreal, Canada-Quebec.
Description: April 11-12, 2018.
- Ruff, K. (2018). *Three Approaches to Materiality: User, Archetypal, and Maieutic*. Interdisciplinary Perspectives in Accounting, Edinburgh, Scotland.
Description: July 11-13, 2018.
- Ruff, K. (2017). *Mattering and de-Mattering*. Critical Perspectives on Accounting Conference, Quebec City, Canada-Quebec.
Description: July 3-5
- Ruff, K. (2017). *Valuation in a hybrid organization*. Accounting, Organization & Society Workshop on Valuation, Technology and Society, Leicester, United Kingdom.
Description: College Court, University of Leicester, April 21-22
- Ruff, K. (2016). *The ontology of a number: Stabilizing inscriptions in a hybrid accounting system and the calculation of the social value of stable employment for a differently able person*. Cross-Sector Partnerships for Systemic Change (CSSI), Toronto, Canada-Ontario.
Description: April 17-20
- Ruff, K. & Himick, D. (2016). *The seal hunt and the slave trade: How non-accounting publics frame accounting to assert their interests and achieve their aims*. Canadian Academic Accounting Association Conference, St John's, Canada-Newfoundland.
- Ruff, K. (2016). *Materiality Matters*. Alternative Accounts Conference, Ottawa, Canada-Ontario.
Description: April 29-30
- Ruff, K. (2015, July). *Materiality in Charity Reporting*. Interdisciplinary Perspectives on Accounting, Stockholm, Sweden.
Description: July 6-7, 2015.
- Ruff, K. (2015, April). *Materiality in Charity Reporting*. Alternative Accounts, Ottawa, Canada.
Description: April 17-18, 2015.
- Ruff, K., Saxon, G., & Neu, D. (2012, December). *Accounting and Social Distance: A study of the accounts that inform philanthropic giving*. Accounting, Organizations and Society Workshop on NGO and Civil Society, London, United Kingdom.
Description: December 7-9, 2012.
- Ruff, K. (2010, November). *Creating Social Reporting Standards: Lessons from the 100-year long struggle to create financial reporting standards*. Association for Research in Nonprofit Organizations and Voluntary Action (ARNOVA), Cleveland, Ohio.
Description: 38th annual conference. November 19-21, 2009.
- Ruff, K. (2010, November). *Clusters of Practice: How consistent are charities in what they measure and report to donors about social performance?* Association for Research in Nonprofit Organizations and Voluntary Action (ARNOVA), Arlington, Vermont.
Description: 39th annual conference. November 18-20, 2010.
- Ruff, K. (2010, June). *Successes and Challenges with Promoting Social Investment in Canadian Social Enterprises*. Association for Nonprofit and Social Economy Research (ANSER-ARES), Montreal, Canada-Quebec.
Description: 3rd annual conference. June 2-4, 2010.

Other Presentations

Invited Lecture

- 2020: Social Value Matters. So Many Standards! How to use global sustainability and impact standards to achieve your goals: A talk by Sarah-Jayne Dominic, Olivia Prentice, Kate Ruff and Karen Wilson
- 2020: Social Value Matters. "Data are Key – A fireside chat with Prof Kate Ruff and Karl H Richter, moderated by Ben Carpenter"
- 2018: Queen Elizabeth Scholar Lecture. Business and the Environment
- 2016 – 2017: Carleton University, PANL, Ottawa, Canada-Ontario. Measuring Social Impact" for PANL 5302 - Responsible and Impact Investing

Keynote Address

- 2019: Leveraging Our Strengths Conference, Ottawa, Canada-Ontario. Flexible standards and impact measurement
- 2012: Social Impact Analysts' Association (SIAA) Annual Conference, Berlin, Germany. "The Emerging Profession", November 22, 2012.

Presentation

- 2022: Employment and Social Development Canada. "Flexible social impact standards" Policy Talk. Government of Canada, Employment and Social Development Canada. Gatineau, QC. September 22, 2022.
- 2021: OECD Global Action. "Social Impact Measurement: Friend or Foe" Paris (virtual) OECD Global Action, 2021, September 16th.
- 2021: Social Economy through Social Inclusion. • Employee Ownership in Canada Dialogue and Deliberation, SETSI, 2021, December 9th.
- 2019: Forum on Evaluation and Social Impact Measurement, Montreal, Canada-Quebec. Plenary Speaker at International Forum on Evaluation and Social Impact Measurement, Montreal, Canada.
- 2019: Social Finance Forum, Toronto, Canada-Ontario. Impact Measurement and management: is standardization needed?
- 2016: American Evaluation Association, Atlanta, Georgia. "The future of impact measurement" President's Panel, October 25, 2016

2016: Impact Convergence, Atlanta, Georgia. "Impact measurement" Plenary presentation, October 24, 2016.

2015: Perspectives Annual Conference, Toronto, Canada-Ontario.

2014: Social Value International. SIAA Challenge: Measurement with a message.

Contract or Other Research

Research Grants and Awards

Grants

2026 [Year 4 of 4]: Ruff, K. Partnership Development Grant (\$46,806.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2025 [Year 5 of 5]: Ruff, K. Grant (\$34,000.00 Pending), Principal Investigator, Ottawa Community Foundation. [Status: Pending]

2025 [Year 3 of 4]: Ruff, K. Partnership Development Grant (\$46,806.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 4 of 5]: Ruff, K. Grant (\$34,000.00 Pending), Principal Investigator, Ottawa Community Foundation. [Status: Pending]

2024 [Year 2 of 4]: Ruff, K. Partnership Development Grant (\$46,806.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 4 of 4]: Ruff, K. Investment Readiness Program (\$220,969.00), Principal Investigator, Employment and Social Development Canada. [Status: Funded]

2023 [Year 3 of 5]: Ruff, K. Grant (\$34,000.00 Pending), Principal Investigator, Ottawa Community Foundation. [Status: Pending]

2023 [Year 1 of 4]: Ruff, K. Partnership Development Grant (\$46,806.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 3 of 4]: Ruff, K. Investment Readiness Program (\$220,969.00), Principal Investigator, Employment and Social Development Canada. [Status: Funded]

2022 [Year 3 of 3]: Ruff, K. Career Focus (\$330,000.00 of a total grant amount of \$100,000,000.00), Principal Investigator, Employment and Social Development Canada. [Status: Funded]

2022 [Year 3 of 3]: Ruff, K. Northwestern University - MOU, Principal Investigator, Northwestern University. [Status: Funded]

2022 [Year 2 of 5]: Ruff, K. Grant (\$34,000.00 Pending), Principal Investigator, Ottawa Community Foundation. [Status: Pending]

2022 [Year 3 of 3]: Duxbury, L. & Ruff, K., Partnership Development Grant, Collaborator, Ottawa Police Service. [Status: Funded]

2022 [Year 2 of 4]: Ruff, K. Investment Readiness Program (\$220,969.00), Principal Investigator, Employment and Social Development Canada. [Status: Funded]

2021 [Year 2 of 3]: Ruff, K. Career Focus (\$330,000.00 of a total grant amount of \$100,000,000.00), Principal Investigator, Employment and Social Development Canada. [Status: Funded]

2021 [Year 2 of 3]: Ruff, K. Northwestern University - MOU, Principal Investigator, Northwestern University. [Status: Funded]

2021 [Year 1 of 5]: Ruff, K. Grant (\$34,000.00 Pending), Principal Investigator, Ottawa Community Foundation. [Status: Pending]

2021: Ruff, K. Investment Readiness Program (\$12,527.00), Principal Investigator, Employment and Social Development Canada. [Status: Funded]

2021: Ruff, K. Partnership Engage Grant (\$24,000.00 Pending), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Pending]

2021 [Year 2 of 3]: Duxbury, L. & Ruff, K., Partnership Development Grant, Collaborator, Ottawa Police Service. [Status: Funded]

2021 [Year 1 of 4]: Ruff, K. Investment Readiness Program (\$220,969.00), Principal Investigator, Employment and Social Development Canada. [Status: Funded]

2020 [Year 2 of 2]: Ruff, K. Employment and Social Development Canada - Contract (\$200,000.00 of a total grant amount of \$400,000.00), Principal Investigator, Employment and Social Development Canada. [Status: Funded]

2020 [Year 2 of 2]: Ruff, K. MaRS - Contract (\$22,000.00 of a total grant amount of \$44,000.00), Principal Investigator, MaRS. [Status: Funded]

2020 [Year 1 of 3]: Ruff, K. Career Focus (\$330,000.00 of a total grant amount of \$100,000,000.00), Principal Investigator, Employment and Social Development Canada. [Status: Funded]

2020 [Year 1 of 3]: Ruff, K. Northwestern University - MOU, Principal Investigator, Northwestern University. [Status: Funded]

2020 [Year 1 of 3]: Duxbury, L. & Ruff, K., Partnership Development Grant, Collaborator, Ottawa Police Service. [Status: Funded]

2020 [Year 2 of 2]: Ruff, K. Grant, Co-Investigator, PRI-Carleton University. co-applicant . [Status: Funded]

2019 [Year 2 of 2]: Ruff, K. Insight Development Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019 [Year 2 of 2]: Ruff, K. Ontario Ministry of Economic Development & Growth - Contract (\$199,688.00 of a total grant amount of \$399,375.00), Principal Investigator, Ontario Ministry of Economic Development & Growth. [Status: Funded]

2019 [Year 1 of 2]: Ruff, K. Employment and Social Development Canada - Contract (\$200,000.00 of a total grant amount of \$400,000.00), Principal Investigator, Employment and Social Development Canada. [Status: Funded]

2019 [Year 1 of 2]: Ruff, K. MaRS - Contract (\$22,000.00 of a total grant amount of \$44,000.00), Principal Investigator, MaRS. [Status: Funded]

2019 [Year 1 of 2]: Ruff, K. Grant, Co-Investigator, PRI-Carleton University. co-applicant . [Status: Funded]

2018 [Year 1 of 2]: Ruff, K. & McShane, L., Insight Development Grant (\$21,097.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2018 [Year 1 of 2]: Ruff, K. Ontario Ministry of Economic Development & Growth - Contract (\$199,688.00 of a total grant amount of \$399,375.00), Principal Investigator, Ontario Ministry of Economic Development & Growth. [Status: Funded]

2018: Ruff, K. Start-up Funds, Grantee, Carleton University, Dean's Office - Arts & Social. [Status: Funded]

2018: Ruff, K. Start-up Funds (\$10,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2017: Ruff, K. Ontario Ministry of Economic Development & Growth - Contract (\$54,261.00), Principal Investigator, Ontario Ministry of Economic Development & Growth. [Status: Funded]

Other Professional Activities

Consulting Experience

2020: Employment and Social Development Canada, Government of Canada., Social Finance Fund Impact Reporting Template, With Shawn de Raff, Mark Fox and Tessa Hebb.

2019 – 2020: Conceptual Framework Working Group, OECD

2016: Ontario Ministry of Economic Development and Growth (MEDG), Impact Measurement Task Force

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2019: Social Enterprise Network of Central Ontario, Barrie, Canada-Ontario.

2015: Interdisciplinary Perspectives on Accounting, Stockholm, Sweden. "Materiality Matters" July 6-7, 2015.

2013: Alternative Accounts, Toronto, Canada-Ontario. "Making up Minds: How standard-setters create information needs". April 26.

2012: Alternative Accounts, Quebec City, Canada-Quebec. "Demanding Accounts: How logics of philanthropy organize accountability practice". April 26, 2012.

2012: Accounting Organizations and Society Workshop on NGO and Civil Society, London, United Kingdom. "Making up Minds: How standard-setters create information needs" Doctoral Colloquium preceding the Accounting Organizations and Society Workshop on NGO and Civil Society. London, England. December 6th, 2012.

Academic Conference: Panelist

2020: Impact Week, Toronto, Canada-Ontario. Panel discussion "Impact Measurement for Investees"

Advisor

2019 – 2020: Conceptual Framework Working Group, OECD.

Board Member: Advisory Board

2020 – 2021: Marigold Capital.

2020: Impact Management Project, Impact Standard Digitalization.

2020: Marigold Capital.

2019 – 2020: Duke Impact Management and Measurement Course Academic Advisory Group.

2018 – 2020: IFLA investment.

2017 – 2020: AHL Venture Partners.

Board of Directors: Moderate Involvement

2014 – 2018: Social Value International.

2013 – 2018: Social Impact Analysts Association.

Board of Directors: Substantial Involvement

2018 – 2020: Common Approach to Impact Measurement. Common Approach to Impact Measurement

Chair: Committee / Task Force

2021 – 2022: Standards Council of Canada.

Invited Lecture

2020: Social Value Matters. So Many Standards! How to use global sustainability and impact standards to achieve your goals: A talk by Sarah-Jayne Dominic, Olivia Prentice, Kate Ruff and Karen Wilson

2020: Social Value Matters. "Data are Key – A fireside chat with Prof Kate Ruff and Karl H Richter, moderated by Ben Carpenter"

2018: Queen Elizabeth Scholar Lecture. Business and the Environment

2016 – 2017: Carleton University, PANL, Ottawa, Canada-Ontario. Measuring Social Impact" for PANL 5302 - Responsible and Impact Investing

Keynote Address

2019: Leveraging Our Strengths Conference, Ottawa, Canada-Ontario. Flexible standards and impact measurement

2012: Social Impact Analysts' Association (SIAA) Annual Conference, Berlin, Germany. "The Emerging Profession", November 22, 2012.

Member: Committee/Task Force

2022: Value Commissioner, Capitals Coalition.

2015 – 2018: Accounting Standards Board Not-For-Profit Associates Group.

Other Professional Service Activities

2023: Independent Review Committee on Standard Setting in Canada.

2020: Impact Investing Workshop, Montreal, Canada-Quebec. Impact Investing Workshop, Concordia University.

2019: United Nations Research Institute for Social Development (UNRISD), Montreal, Canada-Quebec. Two day collaborative research discussion and workshop "Implementing the Sustainable Development Goals: What Role for Social and Solidarity Economy?" United Nations Research Institute for Social Development (UNRISD). Montreal, Canada.

2019: MITACS, Ottawa, Canada-Ontario. Reviewer

Reviewer: Ad Hoc Reviewer for a Journal

2020: Nonprofit and Voluntary Sector Quarterly.

2020: Qualitative Research in Accounting and Management.

2018: American Journal of Evaluation.

2018: Accounting and Finance.

2018: Academy of Management Review.

Reviewer: Conference Paper

2018: Interdisciplinary Perspectives on Accounting.

2018: Alternative Accounts.

Scholarly Work in Progress

Papers Under Review

Ruff, K. (2020). "In support of making up users," 2nd revise and resubmit to *Critical Perspectives on Accounting*.

Ruff, K. (2019). "Materiality in charity social impact reporting: when is an account complete enough?," Initial submission to *Nonprofit and Voluntary Sector Quarterly*.

Ruff, K. (2019). "How devices perform," Revision under 2nd review to *Qualitative Research Accounting Methods*.

Saxton, G., Neu, D., & Ruff, K. (2017). "Demanding Accounts - The Accountability Practices of Philanthropic Foundations," Revision under 2nd review to *Accounting, Organizations and Society*.

Ruff, K. & Olsen, S. (2017). "Impact Measurement Meets Evaluation: Tensions, Challenges, and Opportunities," Initial submission to *American Journal of Evaluation*.

Working Papers

Ruff, K., Nappert, P.L., & Graham, C. (2020). "Should Social Impact Be Monetized? Emic and Etic Valuations in Impact Investing."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2022/Winter	BUSI1004	Financial Accounting for Business Students	0.5	86	Main	100%
2022/Winter	BUSI1004	Financial Accounting for Business Students	0.5	64	Main	100%
2022/Winter	BUSI1004	Financial Accounting for Business Students	0.5	88	Main	100%
2022/Winter	BUSI1004	Financial Accounting for Business Students	0.5	85	Main	100%

2022/Winter	BUSI4901	Selected Topics in Management I	0.08	2	Main	50%
2021/Winter	BUSI1004	Financial Accounting for Business Students	0.5	84	Main	100%
2021/Winter	BUSI1004	Financial Accounting for Business Students	0.5	51	Main	100%
2020/Winter	BUSI6000	Seminar in Accounting I	0.06	1	Main	13%
2020/Winter	ACCT5013	Financial Reporting & Control in Public Organizations	0.25	17	Main	100%
2020/Winter	ACCT5014	Financial Corporate Governance & Accountability	0.25	19	Main	100%
2020/Winter	BUSI1004	Financial Accounting for Business Students	0.5	33	Main	100%
2020/Winter	BUSI1004	Financial Accounting for Business Students	0.5	61	Main	100%
2020/Winter	BUSI5080	Seminar in Accounting I	0.01	0	Main	3.4%
2020/Winter	BUSI3800	Business Case Analysis	0.5	11	Main	100%
2019/Winter	ACCT5014	Financial Corporate Governance & Accountability	0.25	20	Main	100%
2019/Winter	ACCT5013	Financial Reporting & Control in Public Organizations	0.25	28	Main	100%
2019/Winter	BUSI6001	Seminar in Accounting II	0.13	1	Main	25%
2018/Fall	BUSI1004	Financial Accounting for Business Students	0.5	77	Main	100%
2018/Fall	BUSI1004	Financial Accounting for Business Students	0.5	71	Main	100%
2018/Fall	BUSI1004	Financial Accounting for Business Students	0.5	79	Main	100%
2018/Fall	BUSI3800	Business Case Analysis	0.25	9	Main	50%
2018/Winter	ACCT5013	Financial Reporting & Control in Public Organizations	0.25	22	Main	100%
2018/Winter	ACCT5014	Financial Corporate Governance & Accountability	0.25	25	Main	100%
2017/Fall	BUSI1004	Financial Accounting for Business Students	0.05	10	Main	11%
2017/Fall	BUSI1004	Financial Accounting for Business Students	0.36	69	Main	71%
2017/Fall	BUSI1004	Financial Accounting for Business Students	0.45	84	Main	89%
2017/Fall	BUSI1004	Financial Accounting for Business Students	0.14	28	Main	29%
2017/Fall	BUSI1004	Financial Accounting for Business Students	0.04	8	Main	12%
2017/Fall	BUSI6000	Seminar in Accounting I	0.08	1	Main	
2017/Fall	BUSI1004	Financial Accounting for Business Students	0.46	84	Main	91%
2016/Fall	BUSI1004	Financial Accounting for Business Students	0.5	87	Main	100%
2016/Fall	BUSI1004	Financial Accounting for Business Students	0.5	77	Main	100%
2016/Fall	BUSI1004	Financial Accounting for Business Students	0.5	78	Main	100%

Service to the institution (Academic)

University Assignments

Faculty Advisor:

2018-2019: Queen Elizabeth Scholar

Masters Thesis Committees:

2020-2021: Tess MacMillian, External Examiner

External Committees

Thesis Assignments

Masters Thesis Committees:

2017-2018: Co-supervisor, Faiz, K

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Sprott School of Business, Carleton University

School Assignments

Course/Program Coordination:

2019-2020: Professional Accounting Research Group(PARG) Research Discussions, co-coordinator

Other Committees:

2020-2021: Shifting landscapes working group

H. OTHER

Student Experience Activities

2018 - Kellogg Morgan Stanley Impact Investment Case Competition : Case competition and mentorship

2019 - Guest lecture for PANL 5302 – Responsible and Impact Investing, "Measuring Social Impact"

Credentials

Skills

Languages

English – native speaker French – very good command when speaking and listening, fluent-to-near-fluent when reading Nepali – good command when speaking and listening, rudimentary reading Hindi – limited conversation only

Research Reports

2020: Fox, M., Ruff, K., Chowdhury, A., Gajderowicz, B., Abdulai, T., Zhang The Common Impact Data Standard V1.1 (Version 1.1)., submitted to Zenodo.

2019: Ruff, K., Deng, K., Lewkowitz, M., & Ryan, A., Research report: Pathways Towards Data Interoperability for the Sustainable Development Goals., submitted to Employment and Development Canada.

2017: Ruff, K., A common approach to impact measurement for Ontario's Social Enterprise Community: Insights on a path forward., submitted to Ontario Social Enterprise Impact Measurement Task Force.

2016: Ruff, K., Perils and Promises of Social Impact Standards., submitted to Employment and Social Development Canada.

Service to the Community

Member of a Committee

2017 – 2018: United Nations Social Impact Fund Research Council

Other Community Service Activities

2020: West Neighbourhood House, Quality of Life Platform Advisory Group. West Neighbourhood House, Toronto, Canada

2019: Workshop for community organizations, EcoNous2019, Sept 17. Workshop for community organizations, "Common Approach to Impact Measurement" EcoNous2019, London Ontario

Speech / Presentation at a Community Meeting

2020: Impact8, Impact Measurement Talk to social purpose businesses in Montreal

2019: Workshop for community organizations, Impact Measurement

Curriculum Vitae - Sprott School of Business

Ouafa Sakka, PhD
Associate Professor - Tenured, 2013
Sprott School of Business (Accounting)
Telephone: 613-520-2600 x3109
Email: ouafa.sakka@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-6950-6630>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. HEC Montréal.

Title: *Thesis topic: The impact of uncertainty and equivocality on formal controls: the case of information systems development projects* (Advisors: Dr. Louise Côté and Dr. Henri Barki, HEC Montreal)

Master of Science. École des Hautes Études commerciales de Montréal (HEC Montréal).

Title: *Thesis topic: Information disclosure on intellectual capital: a longitudinal study of Canadian biotechnology organizations* (Advisors: Dr. Louise Côté and Dr. Claude Laurin, HEC Montreal)

Bachelor of Business Administration. Institut Supérieur De Gestion De TUNIS.

Professional Certifications

Teaching Certificate in Higher Education, Carleton University, 2011

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (2017 - Present), Ottawa, Canada-Ontario.

Assistant Professor, Sprott School of Business, Carleton University (2008 - 2017), Ottawa, Canada-Ontario.

Visiting Professor, Tunis Business School (2014), Tunis, Tunisia.

Other Employment

Research Assistant, HEC Montreal (Department of Accounting studies and Department of Information Systems (2003 - 2007), Montreal, Canada-Quebec.

Research Assistant, Concordia University (Department of Information Systems) (2003 - 2007), Montréal, Canada-Quebec.

Teaching Assistant, The University of Montreal (2004), Montreal, Canada-Quebec.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		2		2
Articles-in-Progress (All)		4		4
Paper Presentations (Refereed)	1	3		4
Grants - Funded (both refereed and non-refereed)		4		4
Totals	1	13		14

Refereed Scholarly Publications

Articles in Refereed Journals

Bahri, M., Sakka, O., & Kallal, R. (2021). The impact of corruption on the export intensity of SMEs in Tunisia: moderating effects of political instability and regulatory obstacles. *Journal of Entrepreneurship in Emerging Economies*, 13 (5), 1134-1151. [C,Other]

Sakka, O., St-Pierre, J., & Bahri, M. (2019). Innovation collaborations in low-to-medium tech SMEs: the role of the firm's innovation orientation and use of external information. *International Journal of Innovation Management*, 23 (2), 1950011. [B]

St-Pierre, J., Sakka, O., & Bahri, M. (2018). External Financing, Export Intensity and Inter-Organizational Collaborations: Evidence from Canadian SME. *Journal of Small Business Management*, 56 (S1), 68-87. [A]

First published: 04 January 2018

Bahri, M., Saint-Pierre, J., & Sakka, O. (2017). Performance measurement and management for manufacturing SMEs: A Financial Statement-based system. *Measuring Business Excellence*, 21 (1), 17-36. [B]

Forthcoming

Sakka, O., Barki, H., & Côté, L. (2016). Relationship between the interactive use of control systems and the project performance: The moderating effect of uncertainty and equivocality. *International Journal of Project Management*, 34 (3), 508-522. [A]

Sakka, O., Barki, H., & Côté, L. (2013). Interactive and diagnostic uses of management control systems in information system projects: Antecedents and impacts on performance. *Information and Management*, 50 (6), 265-274. [A+]

Brouard, F., Larivet, S., & Sakka, O. (2012). Defis et actions pour relever l'entrepreneuriat social (Actions to take up social entrepreneurship challenges). *La Revue des Sciences de Gestion* (255-256), 17-22.

Bahri, M., Saint-Pierre, J., & Sakka, O. (2011). Economic Added Value: A tool for SMEs' performance management. *International Journal of Productivity and Performance Management*, 60 (6), 603-621. [B]

Sakka, O., & Bahri, M. (2011). Relations entre les objectifs de l'entrepreneur, les pratiques d'affaires et la gestion de l'actif à court terme (Relationships among entrepreneur's objectives, business practices and the management of current assets). *Revue Internationale PME*, 24 (3-4), 79-101. [C]

Brouard, F., Larivet, S., & Sakka, O. (2010). Entrepreneuriat social & participation citoyenne (Social entrepreneurship & citizen participation). *Canadian Journal of Nonprofit and Social Economy Research*, 1 (1), 46-64.

Articles in Refereed Conference Proceedings

Full Paper

St-Pierre, J., Sakka, O., & Bahri, M. (2012). Relations entre le capital social, le financement bancaire et l'intensité d'exportation des PME (Relationships among social capital, bank financing and the rate of export in SMEs). *McGill International Entrepreneurship Conference*. September 21-21, 2012. Pavia, Italy.

Sakka, O., & Bahri, M. (2011). Management Control of Information System projects: Impact on user documentation, consensus building and user satisfaction. *International Conference on Business Information Systems (BIS)*. June 24-27, 2011. Paris, France.

Sakka, O., & Bahri, M. (2010). Évaluation du coût du capital dans les PME: une revue critique de la littérature (Cost of capital valuation in SMEs: a critical literature review). *Administrative Sciences Association of Canada (ASAC)*. May 22-25, 2010. Regina, Saskatchewan. Entrepreneurship and Family Business section.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Ajili, A. & Sakka, O. (2022). *The impact of IFRS adoption and of the 2008 financial crisis on earnings management in European countries*. International Conference on Entrepreneurship, Innovation and Family Business, Tunis, Tunisia.

Ajili, A., Sakka, O., & Ben Ali, C. (2022). *The impact of IFRS adoption and of the 2008 financial crisis on earnings management in European countries*. Laboratoire Interdisciplinaire de Gestion Université Entreprise Conference, Tunis, Tunisia.

Sakka, O. (2019, December). *What factors challenge the quality of internal audit in the public sector? the case of the Canadian federal Government*. LIGUE conference, Tunis, Tunisia.

Sakka, O. (2019, July). *What factors challenge the quality of internal audit in the public sector? the case of the Canadian federal Government*. Portable Emission Measurement Systems (PEMS) Conference, Amsterdam, Netherlands.

Bahri, M., Sakka, O., & Kallal, R. (2018). *Impact of perceived corruption on SMEs' export intensity: The moderating effects of political instability and regulatory obstacles*. International Conference on Economics, Innovation and Business Administration, Istanbul, Turkey. Description: July 23-24

Sakka, O., St-Pierre, J., & Bahri, M. (2017). *Innovation collaborations in SMEs: the role of the firm's innovation orientation and use of external information*. International Research Meeting in Business and Management, Nice, France. Description: Presented at the 8th International Research Meeting in Business and Management, The IPAG Business School, July 6, Nice, France.

Sakka, O., Barki, H., & Cote, L. (2014). *Relationship among teams' information processing capacity and performance in information system projects: the effort of uncertainty and equivocality*. International Conference on Business Information Systems (BIS), Dubai, United Arab Emirates. Description: October 17-18, 2014.

St-Pierre, J., Sakka, O., & Bahri, M. (2013). *Relationships among social capital, access to bank financing and internationalization of SMEs*. Atelier de

Recherche sur l'internationalisation des PME, Trois-Rivières, Canada-Quebec.

Description: September 18, 2013. Institute of Research on SMEs.

Brouard, F., Larivet, S., & Sakka, O. (2012). *Defis et actions pour relever l'entrepreneuriat social (Actions to take up social entrepreneurship challenges)*. l'ère journée de l'Entrepreneuriat Social, Paris, France.

Description: September 10, 2012.

Brouard, F., Sakka, O., & Larivet, S. (2010). *Essai de représentation et de définition du concept de participation citoyenne (Representing and defining the concept of citizen participation)*. Association francophone pour le savoir (ACFAS), Montreal, Canada-Quebec.

Description: Presented at the 78th ACFAS conference, May 13-14, Montreal, Quebec, Canada.

Other Presentations

Invited Lecture

2023: Tunisian Association of Accounting, Tunisia, Tunisia. Guest speaker, webinar "Changes to the Canadian CPA competency Map"

2019: Institute of Advanced Business Studies (Institut des hautes études commerciales de Carthage), Tunis, Tunisia. Invited Lecture on 'Internal audit in the private and public sectors in Canada and the US' to Masters' students in IHEC Carthage, Tunisia, December 5.

Contract or Other Research

Research Grants and Awards

Grants

2021 [Year 2 of 2]: Sakka, O. Insight Development Grant (\$29,137.00 of a total grant amount of \$48,175.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020 [Year 1 of 2]: Sakka, O. Insight Development Grant (\$19,038.00 of a total grant amount of \$48,175.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019: Sakka, O. Development Grant - Explore (\$9,405.00), Principal Investigator, Carleton University, CORIS. Title: What factors determine the quality of internal audit? The case of the Canadian public sector. [Status: Funded]

2019 [Year 2 of 2]: Sakka, O. Insight Development Grant (\$0.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2018 [Year 2 of 2]: Sakka, O. Insight Development Grant (\$30,165.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2018 [Year 1 of 2]: Sakka, O. Insight Development Grant (\$18,849.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2017 [Year 1 of 2]: Sakka, O. Insight Development Grant (\$30,165.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2017 [Year 2 of 2]: Sakka, O. Insight Grant, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2016 [Year 1 of 2]: Sakka, O. Insight Grant, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Invited Lecture

2023: Tunisian Association of Accounting, Tunisia, Tunisia. Guest speaker, webinar "Changes to the Canadian CPA competency Map"

2019: Institute of Advanced Business Studies (Institut des hautes études commerciales de Carthage), Tunis, Tunisia. Invited Lecture on 'Internal audit in the private and public sectors in Canada and the US' to Masters' students in IHEC Carthage, Tunisia, December 5.

Member: Committee/Task Force

2018 – 2020: Canadian Academic Accounting Association. CAAA organizing committee- Education section, member.

Other Professional Service Activities

2019: SSHRC Insight Grant. External evaluator

Reviewer: Ad Hoc Reviewer for a Journal

2023: Revue Internationale PME.

2022: International Journal of Innovation Management.

2021: Information and Management.

2020: Journal of Financial Reporting and Accounting, Information and Management.

2019: Australian Journal of Management.

2018: European Journal of Information Systems.
 2017: International Journal of Project Management.
 2017: Information & Management.
 2012 – 2014: Information & Management.
 2012: Revue Internationale PME.
 2011: International Journal of Project Management.

Reviewer: Conference Paper

2011: Administrative Sciences Association of Canada (ASAC).

Scholarly Work in Progress

Papers Under Review

St-Pierre, J., Sakka, O., Bahri, M., & Fadil, N. (2023). "Does risk management enhance firm resilience? The case of Canadian SMEs," 1st revise and resubmit to *International Small Business Journal*.

Sakka, O., Bahri, M., & Kallal, R. (2018). "Corruption and innovation: the case of Tunisian SMEs.," Initial submission to *Journal of Development Studies*.

Sakka, O., St-Pierre, J., & Bahri, M. (2018). "Innovation collaborations in SMEs: the role of the firm's innovation orientation and use of external information.," 1st revise and resubmit to *International Journal of Innovation Management*.

Working Papers

Ajili, A., Sakka, O., & Ben Ali, C. (2022). "The impact of mandatory IFRS adoption and financial crisis on the trade-off between accrual-based and real earnings management."

Sakka, O. (2020). "Challenging factors to the quality of internal audit in the Canadian public sector."

Sakka, O. (2020). "Management control in Canadian Low-to-Medium Tech SMEs."

St- Pierre, J. & Sakka, O. (2018). "Risk management and innovation performance in SMEs.."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI1001	Financial Accounting	0.5	64	Main	100%
2024/Winter	BUSI2001	Intermediate Accounting I	0.5	69	Main	100%
2023/Fall	BUSI2002	Intermediate Accounting II	0.5	19	Main	100%
2023/Fall	BUSI2001	Intermediate Accounting I	0.5	57	Main	100%
2023/Fall	BUSI2001	Intermediate Accounting I	0.5	71	Main	100%
2023/Summer	BUSI2001	Intermediate Accounting I	0.5	58	Main	100%
2023/Winter	BUSI2001	Intermediate Accounting I	0.5	64	Main	100%
2023/Winter	BUSI2001	Intermediate Accounting I	0.5	38	Main	100%
2023/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	127	Main	100%
2022/Fall	BUSI2001	Intermediate Accounting I	0.5	65	Main	100%
2021/Winter	BUSI1004	Financial Accounting for Business Students	0.5	89	Main	100%
2021/Winter	BUSI2001	Intermediate Accounting I	0.5	45	Main	100%
2021/Winter	BUSI2001	Intermediate Accounting I	0.5	40	Main	100%
2021/Winter	BUSI2001	Intermediate Accounting I	0.5	44	Main	100%
2020/Winter	BUSI2001	Intermediate Accounting I	0.5	68	Main	100%
2020/Winter	BUSI1004	Financial Accounting for Business Students	0.5	71	Main	100%
2020/Winter	BUSI1004	Financial Accounting for Business Students	0.5	64	Main	100%
2020/Winter	BUSI1004	Financial Accounting for Business Students	0.5	83	Main	100%

2019/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	74	Main	100%
2019/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	80	Main	100%
2019/Winter	BUSI6001	Seminar in Accounting II	0.13	0	Main	25%
2019/Winter	BUSI1005	Managerial Accounting for Business Students	0.5	66	Main	100%
2018/Fall	BUSI2001	Intermediate Accounting I	0.5	65	Main	100%
2018/Winter	BUSI2001	Intermediate Accounting I	0.5	60	Main	100%
2017/Fall	BUSI6000	Seminar in Accounting I	0.08	1	Main	
2017/Fall	ACCT5001	Financial Accounting	0.25	31	Main	100%
2017/Fall	ACCT5001	Financial Accounting	0.25	34	Main	100%
2017/Fall	BUSI4901	Selected Topics in Management I	0.5	15	Main	100%
2017/Fall	BUSI2001	Intermediate Accounting I	0.5	50	Main	100%
2017/Winter	BUSI2001	Intermediate Accounting I	0.5	61	Main	100%
2016/Fall	BUSI2001	Intermediate Accounting I	0.5	60	Main	100%
2016/Fall	BUSI4901	Selected Topics in Management I	0.5	16	Main	100%
2016/Fall	ACCT5001	Financial Accounting	0.25	34	Main	100%
2016/Fall	ACCT5001	Financial Accounting	0.25	31	Main	100%
2016/Summer	BUSI6001	Seminar in Accounting II	0.5	3	Main	33%
2016/Winter	BUSI4901	Selected Topics in Management I	0.5	7	Main	100%
2015/Fall	BUSI1004	Financial Accounting for Business Students	0.45	65	Main	89%
2015/Fall	BUSI1004	Financial Accounting for Business Students	0.05	8	Main	11%
2015/Fall	BUSI6000	Seminar in Accounting I	0.08	3	Main	16%
2015/Fall	BUSI2001	Intermediate Accounting I	0.5	78	Main	100%
2015/Fall	BUSI1004	Financial Accounting for Business Students	0.5	62	Main	100%

Service to the institution (Academic)

University Assignments

Faculty Advisor:

2021-2022: University of Tunis Carthage

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2016-2017 – 2017-2018: Hiring Committee - Accounting Faculty

H. OTHER

Student Experience Activities

2012 - Judge- DECA case competition-Undergraduate

Credentials

Professional Memberships

American Accounting Association, N/A

Canadian Academic Accounting Association, N/A

International Federation of Francophone Accountants, N/A

Skills

Languages

English: Read, write, speak French: Read, write, speak Arabic: Read, write, speak

Curriculum Vitae - Sprott School of Business

Linda Schweitzer, PhD
Full Professor - Tenured, 2012
Sprott School of Business (Management and Strategy)
Telephone: 613-520-2600 x1967
Email: linda.schweitzer@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0001-7768-340X>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Carleton University.
Title: *Virtual team effectiveness: An exploration*
Master of Business Administration. Concordia University.
Bachelor of Engineering. Concordia University.

B. EMPLOYMENT

Academic Appointments

Professor, Sprott School of Business, Carleton University (July, 2019 - Present), Ottawa, Canada-Ontario.
Interim Dean, Sprott School of Business, Carleton University (June, 2017 - June, 2019), Ottawa, Canada-Ontario.
Associate Professor, Sprott School of Business, Carleton University (July, 2012 - June, 2019), Ottawa, Canada-Ontario.
Associate Dean, Research & External, Sprott School of Business, Carleton University (July, 2012 - May, 2017), Ottawa, Canada-Ontario.
Associate Dean, MBA Programs, Sprott School of Business, Carleton University (July, 2012 - June, 2013), Ottawa, Canada-Ontario.
Assistant Dean, MBA Programs, Sprott School of Business, Carleton University (July, 2011 - June, 2012), Ottawa, Canada-Ontario.
Assistant Professor, Sprott School of Business, Carleton University (July, 2008 - June, 2012), Ottawa, Canada-Ontario.
Instructor, Sprott School of Business, Carleton University (2006 - 2008), Ottawa, Canada-Ontario.
Assistant Professor, University of Ottawa (2006), Ottawa, Canada-Ontario.

Other Employment

Sessional Lecturer, Sprott School of Business, Carleton University (2000 - 2006), Ottawa, Canada-Ontario.
Project Manager/Director of Development, CTN/CATA (1996 - 1999), Ottawa, Canada-Ontario.
Project Manager, MettNet Inc. (Technology Transfer Network) (1994 - 1996), Montreal, Canada-Quebec.
Project Manager, ADN (Air Quality Engineering) (1991 - 1992), Montreal, Canada-Quebec.
Project Manager, Large Construction Projects, Bell Canada (1990 - 1991), Montreal, Canada-Quebec.

C. PROFESSIONAL HONOURS

2015: Outstanding Paper Award, Emerald Literati Network Awards for Excellence. Lyons, S. T., Schweitzer, L., & Ng, E.S. (2015). How Have Careers Changed? Career Patterns Across Four Generations. *Journal of Managerial Psychology*, 30(1), 8-21

.

2014: Best Paper, Human Resources Division, Administrative Sciences Association of Canada (ASAC) Conference, Muskoka, Ontario, Canada. Kuron, L.K.J., Schweitzer, L., Lyons, S. T., & Ng, E.S. (2014). Careers Profiled: Investigating Differences In Career Behaviours, Attitudes And Experience,. Human Resources Division.

2014: Highly Commended Paper Award, Emerald Literati Network Awards for Excellence. Schweitzer, L., Lyons, S. T., Kuron, L., & Ng, E.S. (2014). The gender gap in pre-career salary expectations: a test of five explanations, *Career Development International*, 19(4), 404 - 425..

2013: Best Paper, Human Resources Division, Administrative Sciences Association of Canada (ASAC) Conference, Calgary, Alberta, Canada. Lyons, S.T., Schweitzer, L., & Ng, E.S. (2013). Launching a Career: A Qualitative Study of Inter-generational Differences in the Early Career Stage..

2013: Highly Commended Paper Award, Emerald Literati Network Awards for Excellence. Lyons, S. T., Schweitzer, L., Ng, E.S., & Kuron, L.K.J. (2012). Comparing Apples to Apples: A Qualitative Investigation of Career Mobility Patterns across Four Generations. *Career Development International*, 17(4), 333-357..

2010: Best Paper, Gender and Diversity in Organizations Division, Administrative Sciences Association of Canada (ASAC) Conference, Regina, Saskatchewan, Canada. Schweitzer, L., Ng, E.S., Lyons, S. T., & Kuron, L. (2010). Education and career expectations: a pattern of gender differences. .

2009: Best Paper, Gender and Diversity in Organizations Division, Administrative Sciences Association of Canada (ASAC) Conference, Niagara Falls, Ontario, Canada. Lyons, S.T., Schweitzer, L., & Ng, E.S. (2009). The shifting nature of careers in Canada: A framework for research..

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	2	2		4
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings			3	3
Paper Presentations (Refereed)		3		3
Grants - Funded (both refereed and non-refereed)		6		6
Other Research, Non-refereed		1		1
Totals	2	12	3	17

Refereed Scholarly Publications

Articles in Refereed Journals

Ayoozbadeh, M., Schweitzer, L., Lyons, S., & Ng, E. (2024). A tale of two generations: a time-lag study of career expectations. *Personnel Review*. [A]

DOI only

Schweitzer, L., Lyons, S., & Smith, C. J. (2023). Career Sustainability: Framing the Past to Adapt in the Present for a Sustainable Future. *Sustainability*, 15. [C,Other]

Smith, C. J., Schweitzer, L., Launch, K., & Bird, A. (2022). "Well, actually": Investigating mansplaining in the modern workplace. *Journal of Management and Organization*, 1-9. [B]

Published online by Cambridge University Press: 11 November 2022

Ayoozbadeh, M., Lyons, S. T., & Schweitzer, L. (2021). Career Expectations of International and Domestic Students in Canada. *International Journal for Educational and Vocational Guidance*, 1-20. [C,Other]

Published with DOI

Lyons, S. T., Schweitzer, L., Urick, M. J., & Kuron, L. (2019). A Dynamic Social-Ecological Model of Generational Identity in the Workplace. *Journal of Intergenerational Relationships*, 17 (1), 1-24. [B,Other]

Lyons, S. T., & Schweitzer, L. (2017). A Qualitative Exploration of Generational Identity: Making Sense of Young and Old in the Context of Today's Workplace. *Work, Aging and Retirement*, 3 (2), 209-224.

Kuron, L., Schweitzer, L., Lyons, S., & Ng, E. (2016). Career Profiles in the 'New Career:' Evidence of their Prevalence and Correlates. *Career Development International*, 21 (4), 355-377. [B]

Lyons, S.T., Urick, M., Kuron, L., & Schweitzer, L. (2015). Generational Differences in the Workplace: There is Complexity beyond the Stereotypes. *Industrial and Organizational Psychology: Perspectives on Science and Practice*, 8 (3), 346-356. [B]

Contribution: Co-author

Kuron, L.K.J., Lyons, S.T., Schweitzer, L., & Ng, E.S. (2015). Millennials' Work Values: Differences Across the School to Work Transition. *Personnel Review*, 44 (6), 991-1009. [A]

Contribution: Co-author, co-editing of final draft for publication.

Lyons, S.T., Schweitzer, L., & Ng, E.S. (2015). How Have Careers Changed? Career Patterns Across Generations. *Journal of Managerial Psychology*, 30 (1), 8-21. [B]

Contribution: Co-author, statistical analysis and interpretation.

Lyons, S.T., Schweitzer, L., & Ng, E.S. (2015). Resilience in the Modern Career. *Career Development International*. [B]

Contribution: Co-author, statistical analysis and interpretation.

Thomas, R., Zumbo, B.D., Kwan, E., & Schweitzer, L. (2014). On Johnson's (2000) Relative Weights Method for Assessing Variable Importance: A Reanalysis. *Multivariate Behavioral Research*, 49 (4), 329-338. [A]

Contribution: Co-author, statistical modelling, editing of final draft for submission

Schweitzer, L., Lyons, S.T., Kuron, L., & Ng, E.S. (2014). The gender gap in pre-career salary expectations: a test of five explanations. *Career Development International*, 19 (4), 404 - 425. [B]

Lead author, statistical analysis and interpretation, literature review, editing of final draft for submission.

Lyons, S.T., Ng, E.S., & Schweitzer, L. (2014). Changing Demographics and the Shifting Nature of Careers: Implications for Research and Human Resource Development. *Human Resource Development Review*, 13 (2), 181-206. [B]

Contribution: Co-author, literature review

Ng, E.S., Schweitzer, L., & Lyons, S.T. (2012). Anticipated Discrimination and a Career Choice in Nonprofit: A Study of Early Career Lesbian, Gay, Bisexual, Transgendered (LGBT) Job Seekers. *Review of Public Personnel Administration*, 32 (4), 332-352. [B]

Contribution: Co-author, statistical analysis and interpretation, co-editing of final draft for publication.

Lyons, S.T., Schweitzer, L., Ng, E.S., & Kuron, L.K.J. (2012). Comparing Apples to Apples: A Qualitative Investigation of Career Mobility Patterns across Four Generations. *Career Development International*, 17 (4), 333-357. [B]

Contribution: Co-author, statistical analysis and interpretation.

Schweitzer, L., Lyons, S.T., & Ng, E.S. (2011). Exploring the career pipeline: Gender differences in pre-career expectations. *Relations Industrielles*, 66 (3), 422-444. [B]

Contribution: Lead author, statistical analysis and interpretation, literature review, editing of final draft for publication.

Ng, E.S., Schweitzer, L., & Lyons, S. (2010). New generation, great expectations: A field study of the millennial generation. *Journal of Business and Psychology*, 25 (2), 281-292. [A]

Contribution: Co-author, literature review, statistical analysis and interpretation, co-editing of final draft for publication.

Schweitzer, L., & Duxbury, L. (2010). Conceptualizing and Measuring the Virtuality of Teams. *Information Systems Journal*, 20 (2), 267-295. [A+]

Thesis supervisor on this topic, helped with writing and editing. Contribution: Lead author, literature review, statistical analysis and interpretation, editing of final draft for publication.

Freidman, P.A., & Schweitzer, L. (2010). The impact of recession on IT recruitment and retention. *International Journal of Knowledge, Culture and Change Management*, 10 (4), 99-108. [C]

Contribution: Co-author, literature review, development of data collection instrument, editing of final draft, revision for resubmission for publication

Friedman, P.A., Schweitzer, L., & Karoles, L. (2008). The gender neutral approach of the Canadian forces: integrating women into the military. *International Journal of Diversity in Organizations, Communities and Nations*, 8 (4), 69-76.

Contribution: Co-author, literature review, revision for resubmission for publication.

Schweitzer, L., & Lyons, S.T. (2008). The market within: A marketing approach to creating and developing high-value employment relationships. *Business Horizons*, 51 (6), 555-565. [B]

Contribution: Co-author, literature review, co-editing of final draft for publication.

Note: Editorial Board Review

Articles in Refereed Conference Proceedings

Full Paper

Schweitzer, L., Zumbo, B., Kwan, E., & Thomas, R. (2016). Revisiting the Pratt index of variable importance through multi dimensional geometry. *International Congress of Psychology*.

Kuron, L.K.J., Schweitzer, L., Lyons, S.T., & Ng, E.S. (2014). Careers Profiled: Investigating Differences in Career Behaviours, Attitudes And Experience. *Administrative Sciences Association of Canada (ASAC)*.

Contribution: Co-author, analysis, co-editing of final draft for publication. Human Resources Division.

Kuron, L.K.J., Schweitzer, L., Lyons, S.T., & Ng, E.S. (2013). Writing Their Own Stories? A Qualitative Investigation of Millennials' Careers. *Administrative Sciences Association of Canada (ASAC)*.

Contribution: Co-author, analysis, co-editing of final draft for publication. Human Resources Division.

Lyons, S.T., Schweitzer, L., & Ng, E.S. (2013). Launching a Career: A Qualitative Study of Inter-generational Differences in the Early Career Stage. *Administrative Sciences Association of Canada (ASAC)*.

Contribution: Co-author, co-editing of final draft for publication. Human Resources Division.

Ng, E.S., Lyons, S.T., & Schweitzer, L. (2012). Managing the New Workforce: International Perspectives on the Millennial Generation: Managing Millennials. *Academy of Management (AOM)*.

Careers and Gender and Diversity Divisions.

Contribution: Co-author, literature review, statistical analysis and interpretation.

Lyons, S.T., Schweitzer, L., & Ng, E.S. (2012). Have Careers Really Shifted? An Inter-generational Perspective on Modern Careers. *Academy of Management (AOM)*.

Cross-Divisional. Nominated for best paper.

Contribution: Co-author, co-editing of final draft for publication.

Lyons, S.T., Ng, E.S., Schweitzer, L., & Kuron, L.K.J. (2012). Intergenerational Differences in Work Values, Career Anchors and Organizational Mobility. *International Society for the Study of Organizational and Work Values (ISSWOV)*.

Contribution: Co-author, co-editing of final draft for publication.

Kuron, L.K.J., Lyons, S.T., Schweitzer, L., & Ng, E.S. (2012). Work values of the millennial generation: a comparison of pre-career and working millennials. *Administrative Sciences Association of Canada (ASAC)*.

Contribution: Co-author, co-editing of final draft for publication. Human Resources Division.

Ng, E.S., Schweitzer, L., & Lyons, S.T. (2012). Public and Nonprofit Sectors as Safe Havens: A Comparison of Lesbian, Gay, Bisexual, Transgendered (LGBT), and Heterosexual Job Seekers. *Administrative Sciences Association of Canada (ASAC)*.

Contribution: Co-author, co-editing of final draft for publication. Gender and Diversity in Organizations Division.

Schweitzer, L., Ng, E.S., Lyons, S.T., & Kuron, L. (2010). Education and career expectations: a pattern of gender differences. *Administrative Sciences Association of Canada (ASAC)*, 31 (11).

Contribution: Lead author, statistical analysis and interpretation, literature review.

Schweitzer, L., Lyons, S.T., & Ng, E.S. (2010). Managing in the new millennium: Gen Y and workplace expectations. *International Society for the Study of Organizational and Work Values (ISSWOV)*.

Contribution: Co-author, literature review, statistical analysis and interpretation, co-presented paper.

Lyons, S.T., Schweitzer, L., & Ng, E.S. (2009). The shifting nature of careers in Canada: A framework for research. *Administrative Sciences Association of Canada (ASAC)*, 30 (10).

Contribution: Co-author, literature review, co-presented paper.

Lyons, S.T., & Schweitzer, L. (2008). The structure of work values: A replication with two measures. *International Society for the Study of Organizational and Work Values (ISSWOV)*, 129-136.

Contribution: Co-author, literature review, statistical analysis and interpretation.

Karoles, L., Freidman, P.A., & Schweitzer, L. (2008). Women in the Canadian military. *Administrative Sciences Association of Canada (ASAC)*, 29 (11), 19-31.

Contribution: Co-author, literature review. Gender and Diversity in Organizations Division.

Abstract Only

Ng, E.S., Lyons, S.T., & Schweitzer, L. (2015). Generational Diversity at Work: Beyond Work Values. *Academy of Management (AOM)*.

Contribution: Co-author, co-editing of final draft for publication. [Abstract]

Lyons, S.T., Ng, E.S., & Schweitzer, L. (2014). Launching a Career: Inter-Generational Differences in the Early Career Stage. *Academy of Management (AOM)*.

Contribution: Co-author, co-editing of final draft for publication. [Abstract]

Schweitzer, L., Kuron, L.K.J., Ng, E.S., & Lyons, S.T. (2011). Gender and career expectations: New findings from the Millennial Generation. *Administrative Sciences Association of Canada (ASAC)*, 32 (11), 7.

Contribution: Lead author, statistical analysis and interpretation, literature review. Gender and Diversity in Organizations Division. [Abstract]

Ng, E.S., Lyons, S.T., & Schweitzer, L. (2011). Millennials as a new generation? *Academy of Management (AOM)*.

Contribution: Co-author, literature review. [Abstract]

Schweitzer, L., & Lyons, S.T. (2007). The market within: Applying marketing concepts to managing human resources. *Administrative Sciences Association of Canada (ASAC)*, 28 (5), 292.

Contribution: Co-author, literature review. Human Resources Division. [Abstract]

Schweitzer, L., & Duxbury, L. (2003). What do we know about Canadian teleworkers? *Administrative Sciences Association of Canada (ASAC)*, 24 (9), 176.

Contribution: Co-author, literature review. Human Resources Division. [Abstract]

Edited Books

Ng, E. S., Lyons, S. T., & Schweitzer, L. (2018). *Generational Career Shifts: How Matures, Boomers, Gen Xers, and Millennials View Work*. Bingley, England: Emerald Publishing.

Ng, E.S., Lyons, S.T., & Schweitzer, L. (Ed.). (2012). *Managing the New Workforce: International Perspectives on the Millennial Generation*. Northampton, MA: Edward Elgar Publishing.

Description: Contribution: Co-editor

Chapters in Edited Books

Ng, E.S., Lyons, S.T., & Schweitzer, L. (2017). Millennials: Young Workers in a Challenging Labour Market. In E. Parry and J. McCarthy (Eds.),

Handbook of Age Diversity and Work (pp. 325-344). London, England: Palgrave Macmillan. [Status: Published]

Description: Contribution: Co-author, co-editing of final draft for publication

Lyons, S., Schweitzer, L., & Ng, E. (2016). Generational Differences in Work Values: Evidence from Canada. *Generational differences in work values and work ethic: An international perspective*. Nova Science Publications. [Status: Published]

Lyons, S.T., Ng, E.S., & Schweitzer, L. (2014). Launching a Career: Inter-generational differences in the early career stage based on retrospective accounts. In E. Parry (Ed.), *Generational Diversity at Work: New Perspectives in Research* (pp. 148-163). New York, NY: Routledge. [Status: Published]

Description: (Contribution) Co-author, analysis and interpretation, co-editing of final draft for publication.

Schweitzer, L., Ng, E.S., Lyons, S.T., & Kuron, L.K.J. (2012). Managing career expectations and work motivation in Canada: A field study of the millennial generation. In E.S. Ng, S.T. Lyons & L. Schweitzer (Eds.), *Managing the New Workforce: International Perspectives on the Millennial Generation* (pp. 64-85). Northampton, MA: Edward Elgar Publishing. [Status: Published]

Description: (Contribution) Co-author, statistical analysis and interpretation, co-editing of final draft for publication.

Other (Non-refereed) Scholarly Publications

Chapters in non-refereed books

van der Star, G., van Dooren, A., Japin, X., & Schweitzer, L. (2020). Port of Rotterdam: Riding the Wave. *Rotterdam Carleton International Case Competition*. Rotterdam Carleton International Case Competition.

van der Star, G., Voorburg, A., & Schweitzer, L. (2020). Arcadis: Driving the Change in Rotterdam. *Rotterdam Carleton International Case Competition*. Rotterdam Carleton International Case Competition.

van der Star, G., van der Brugge, J., & Schweitzer, L. (2020). Facilicom: The Next Move of a Cleaning Giant. *Rotterdam Carleton International Case Competition*. Rotterdam Carleton International Case Competition.

Other Scholarly Publications

2021: Vukovic, B., Connolly, T., Schweitzer, L., Mantler, J., & Godden, L. *Career Transitions and Accessibility in the Canadian Federal Public Service*.

2011: Lyons, S.T., Ng, E.S., & Schweitzer, L., *Shifting career expectations, experiences, attitudes and values in Canada: Summary report of key findings*. Contribution: Co-author, literature review, statistical analysis and interpretation. Gencareershift.ca

Other Publications

Other Publications

2017: Schweitzer, L., *Millennials' Work Values and Employment*. Bulletin d'Information: Barrières et solutions à l'emploi des jeunes/Barriers and Solutions to Youth Employment, Observatoire Jeunes et Société, Institut national de la recherche scientifique, 14 (1), 20-21.

2014: Bujaki, M., & Schweitzer, L., *How Should the Issue of Inadequate Gender Balance and Diversity on Boards Be Addressed?* In C.Gardiner and S. Cotsman, *Perspectives on Board Diversity*, (pp. 7-10), Ottawa, Canada: The Conference Board of Canada.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Conference Proceedings

2008: Administrative Sciences Association of Canada (ASAC) (National). Academic Reviewer and Proceedings Editor, Gender and Diversity in Organizations Division.

Presentations

Papers Presented at Conferences

Refereed

Pegoraro, A., Smith, C.J., Schweitzer, L., & Lyons, S.T. (2023). *The Changing Nature of Work: the impact of various hybrid workplace models on women in Canadian Sport*. Sport Canada Research Initiative (SCRI), Ottawa, Canada-Ontario.

Schweitzer, L., Lyons, S.T., & Ayoobzade, M. (2020). *Unpacking Future Career Orientations: Expectations, Aspirations and Attitudes about the Future*. Academy of Management, Vienna, Austria.

Ayoobzadeh, M., Schweitzer, L., Lyons, S.T., & Ng, E.S. (2020). *From GenY to GenZ: New Generation, Different Expectations*. Administrative Sciences Association of Canada, Virtual, Virtual.

Kwan, E., Thomas, R., Schweitzer, L., & Zumbo, B. (2016). *Revisiting the Pratt index of variable importance through multi dimensional geometry*. International Congress of Psychology, Yokohama, Japan.

Ng, E., Lyons, S., & Schweitzer, L. (2016). *Implications of Gender and Immigration Status on the Career of Millennials*. Academy of Management (AOM), Anaheim, California.

Lyons, S.T., Schweitzer, L., & Ng, E.S. (2009). *Expectations and decision making in the Millennial generation*. Administrative Sciences Association of Canada (ASAC), Niagara Falls, Canada-Ontario.

Description: Contribution: Co-author, literature review, presented paper.

Other Presentations

Keynote Address

2011: Research Works. Title: *Gender and Career Expectations: Exploring the Gap (in the Millennial Generation)*. Carleton University, Ottawa, Ontario, Canada. (May)

Presentation

2020: Commission for Complaints for Telecom-television Services.

2020: Strategic Enrolment and Marketing Forum. Student Career Planning Post-COVID-19: What We Know and What We Need to Know

2019: Future Workforce Conference, Toronto, Canada-Ontario. The Truth About Gen Z: What We Really Know about Their Employer Preferences & Career Aspirations

2019: Strategic Enrolment and Marketing Forum, Toronto, Canada-Ontario. Leaders' Track: Deep Dive into The Truth About Gen Z, SEMM Forum

2019: Strategic Enrolment and Marketing Forum, Toronto, Canada-Ontario. The Truth About Gen Z: What We Really Know about their Education Experience & Career Aspirations, SEMM Forum (Strategic Enrolment and Marketing Forum)

2014: Carleton University Library Professional Development Day. Title: Communicating Across the Invisible Divide. (April)

2012: Research Panel, 20/20 Vision: Empowering Women Conference. Title: *The Gender-Expectations Gap*. Centre for Research & Education on Women & Work, Carleton University, Ottawa, Ontario, Canada. (May)

2011: Sprott-Telfer Research Day. Title: Expectations of the Millennial Generation. Carleton University, Ottawa, Ontario, Canada. (April)

Contract or Other Research

Research Grants and Awards

Grants

2022 [Year 2 of 2]: Schweitzer, L. Future Skills (\$186,088.00 Not Funded of a total grant amount of \$372,176.00), Principal Investigator, Employment and Social Development Canada. [Status: Not Funded]

2021 [Year 1 of 2]: Schweitzer, L. Future Skills (\$186,088.00 Not Funded of a total grant amount of \$372,176.00), Principal Investigator, Employment and Social Development Canada. [Status: Not Funded]

2020 [Year 5 of 5]: Schweitzer, L. Insight Grant (\$31,925.00 of a total grant amount of \$159,626.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020: Schweitzer, L., Angela, D., Firoozi, M., & Nardon, L., Multidisciplinary Research Catalyst Fund (\$50,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2020: Schweitzer, L. CU COVID-19 Rapid Research Response Grants (\$18,507.00), Principal Investigator, PRI-Carleton University. [Status: Funded]

2020: Schweitzer, L. COVID Supplement (\$6,000.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020: Schweitzer, L. Contract (\$100,000.00 Not Funded), Principal Investigator, Ontario Ministry of Labour. [Status: Not Funded]

2019 [Year 4 of 5]: Schweitzer, L. Insight Grant (\$31,925.00 of a total grant amount of \$159,626.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2019: Nardon, L. & Isabelle, D., Partnership Engage Grant, Co-Investigator, Carleton University - Centre for Research & Education on Women and Work (CREWW). co-applicant. [Status: Funded]

2018 [Year 3 of 5]: Schweitzer, L. Insight Grant (\$31,925.00 of a total grant amount of \$159,626.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2017 [Year 2 of 5]: Schweitzer, L. Insight Grant (\$31,925.00 of a total grant amount of \$159,626.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2016: Schweitzer, L. Accelerate, Grantee, Global Affairs Canada. [Status: Funded]

2016 [Year 1 of 5]: Schweitzer, L. Insight Grant (\$31,925.00 of a total grant amount of \$159,626.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2013: Schweitzer, L. Accelerate (\$7,500.00), Principal Investigator, Wall Communications Inc.. [Status: Funded]

2013: Schweitzer, L. Accelerate (\$7,500.00), Principal Investigator, Mitacs. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Chair: Conference / Track / Program

2010: Administrative Sciences Association of Canada (ASAC). Division Chair, Gender and Diversity in Organizations Division.

2009: Administrative Sciences Association of Canada (ASAC). Program Chair, Gender and Diversity in Organizations Division.

Keynote Address

2011: Research Works. Title: *Gender and Career Expectations: Exploring the Gap (in the Millennial Generation)*. Carleton University, Ottawa, Ontario, Canada. (May)

Member: Committee/Task Force

2021: SSHRC IDG Adjudication Committee.

2020: Social Sciences and Humanities Research Council. IDG Adjudication Committee

2020: Rotterdam Carleton International Case Competition. ROCA Organizing Committee

Reviewer: Ad Hoc Reviewer for a Journal

2014: Social Sciences and Humanities Research Council (SSHRC).

2014: Journal of Managerial Psychology. 2014 to present.

2014: Personnel Review. 2014 to present.

2014: Human Resource Development Review. 2014 to present.

2012: Review of Public Personnel Administration. 2012 to present.

2012: Career Development International. 2012 to present.

2009: Academy of Management Perspectives.

Reviewer: Conference Paper

2012: Americas Conference on Information Systems (AMCIS).

2009: Hawaii International Conference on System Sciences (HICSS). 2009 to present.

2007: Sprott PhD Symposium. 2007 to 2010.

2007: Administrative Sciences Association of Canada (ASAC). Human Resources and Gender and Diversity in Organizations Divisions. 2007 to 2012.

2005: Academy of Management (AOM). Organizational Behaviour, Change Management, and Gender and Diversity in Organizations Divisions. 2005 to 2008.

Scholarly Work in Progress

Papers Under Review

Kwan, E., Thomas, D. R., Zumbo, B., & Schweitzer, L. (2018). "Examining distractors/options in multiple-choice questions for classroom assessments," Initial submission to *Educational Assessment*.

Lyons, S.T., Ulrich, M., Schweitzer, L., & Kuron, L. (2015). "A Dynamic Social-Ecological Approach to Generations in the Workplace," Initial submission.

Description: Submitted to Academy of Management Review.

Contribution: Co-author, co-editing of final draft for publication.

Working Papers

Lyons, S. & Schweitzer, L. (2018). "Are generational differences real? Unpacking epistemological assumptions underlying the construct of generations.."

Schweitzer, L. & Lyons, S. (2018). "Great expectations revisited: A qualitative study of the career expectations of today's emerging adults.."

Schweitzer, L. & Lyons, S. (2018). "Different values or different definitions? A qualitative investigation of implicit definitions of work values."

Lyons, S. & Schweitzer, L. (2018). "Narratives of the modern career: A career construction perspective on career storytelling."

Schweitzer, L. & Kuron, L. (2018). "What do today's new workers want?."

Thomas, R.D., Kwan, E., & Schweitzer, L. (2015). "Variable Importance in Linear Regression in the Presence of Suppressor Variables: Pratt's Method Revisited and Extended."

Description: (Contribution) Co-author, co-editing of final draft for publication

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI3309	Project Management	0.5	175	Main	100%
2024/Winter	MGMT5113	Managing Teams	0.25	17	Main	100%
2023/Fall	BUSI5801	Statistics for Managers	0.25	258	Main	100%
2023/Fall	BUSI5801	Statistics for Managers	0.25	15	Main	100%

2023/Fall	BUSI3309	Project Management	0.5	182	Main	100%
2023/Summer	BUSI5801	Statistics for Managers	0.25	214	Main	100%
2023/Winter	TOMS5302	Operations Management	0.25	38	Shanghai	100%
2023/Winter	MGMT5113	Managing Teams	0.25	13	Main	100%
2023/Winter	BUSI3309	Project Management	0.5	155	Main	100%
2022/Fall	BUSI5801	Statistics for Managers	0.25	126	Main	100%
2022/Fall	BUSI5801	Statistics for Managers	0.25	18	Main	100%
2022/Fall	BUSI3309	Project Management	0.5	203	Main	100%
2022/Summer	BUSI5801	Statistics for Managers	0.25	51	Main	100%
2022/Winter	MGMT5113	Managing Teams	0.25	17	Main	100%
2022/Winter	BUSI3309	Project Management	0.5	30	Main	100%
2021/Fall	TOMS5302	Operations Management	0.25	34	Shanghai	100%
2021/Summer	TOMS5302	Operations Management	0.25	28	Shanghai	100%
2020/Summer	BUSI6103	Seminar in Strategic Management	0.5	8	Main	100%
2020/Winter	TOMS5302	Operations Management	0.25	24	Main	100%
2020/Winter	MGMT5113	Managing Teams	0.25	27	Main	100%
2020/Winter	BUSI6904	Quantitative Research Design	0.4	8	Main	80%
2020/Winter	BUSI5984	Quantitative Research Design	0.1	2	Main	20%
2020/Winter	BUSI3309	Project Management	0.5	60	Main	100%
2020/Winter	BUSI3309	Project Management	0.5	60	Main	100%
2018/Fall	BUSI3800	Business Case Analysis	0.25	9	Main	50%
2016/Winter	MGMT5117	Knowledge Management	0.25	23	Bogota	100%
2015/Fall	BUSI3800	Business Case Analysis	0.44	28	Main	88%
2015/Fall	BUSI3800	Business Case Analysis	0.06	4	Main	12%

Service to the institution (Academic)

Faculty Assignments

MBA Projects:

2011: Sergio Nuzzi
2010: Amir Hossein Mortezaian
2009: Jordan Wakefield
2008: Tala Farah
2008: Payam Khalili Tehrani
2007: Yichao Zhang

PhD. Comprehensive Committees:

2014: Sean McGrath
2014: Samina Saifuddin
2013: Chris Smith
2012: Narhges Shahsavarani
2012: Tom Duxbury

2010: Anfeng Hui

2008: Perley-Ann Friedman

PhD. Thesis Committees:

2015: Samina Saifuddin

2015: Cheryl Volesky

2015: Sean McGrath

2012: Perley-Ann Friedman

University Assignments

Masters Thesis Committees:

2012: Michelle MacArthur

2011: Marci Perinea

2011: Holly Holmes

University Assignments

PhD. Comprehensive Committees:

2023-2024: Eugenia Kalantzis

PhD. Thesis Committees:

2021-2022: Mirit Kastelman Grabarski, External Examiner

Innovation in Teaching Methods

Innovations in Course Content / Presentation

2010 - *Program Redesign.*

2008 - *Course Development/Creation: MGMT 5117 (Knowledge Management).*

2008 - *Course Development/Creation: MGMT 5112 (Power & Influence).*

2008 - *Course Redesign: BUSI 3105 (Managing Groups).*

2008 - *Course Redesign: BUSI 4108 (Organizational Learning).*

2007 - *Course Redesign: Communication (MDPW).*

2006 - *Program Redesign.*

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2024-2025: Special Fund EDI Research and Pedagogical innovation

2024-2025: EDI Committee

2023-2024 – 2024-2025: Sprott Constitution Review Committee

2023-2024: Faculty Board Constitution Committee

2015-2016 – 2019-2020: Assurance of Learning (AOL) Committee (Co-Chair)

2018-2019: Sprott Branding Taskforce

2018-2019: Hiring - Plenary Committee

2017-2018 – 2018-2019: Tenure and Promotion Committee - Faculty

2017-2018 – 2018-2019: Management Board

2017-2018 – 2018-2019: Sprott Teaching Awards Committee

2017-2018 – 2018-2019: Teaching Area Coordinators

2017-2018: Hiring Committee - Associate Dean (Professional Graduate Programs)

2017-2018: Plenary Committee

2015-2016: Research Committee

Faculty Assignments

Course/Program Coordination:

- 2010-2011: Coordinator, MBA Math Matters
- 2008-2009 – 2010-2011: Coordinator, MBA Prep Week
- 2009: Course coordinator, BUSI 3104, BUSI 3105. (to present)

Hiring Committees:

- 2013-2014: Member, Hiring Committee, Global Entrepreneurship
- 2012-2013 – 2013-2014: Member, Hiring Committee, Management and Strategy
- 2010-2011: Member, TIMS Hiring Committee
- 2009-2010: Member, Hiring Committee, Operations Management
- 2008-2009: Member, Hiring Committee, Management and Strategy
- 2008-2009: Member, Hiring Committee, Finance

Other Committees:

- 2014: Member, Teaching Load Incentive Task Force. (to present)
- 2014: Member, Assurance of Learning Committee. (to present)
- 2012-2013: Member, Accreditation Steering Committee
- 2011: Member, Management Board. (to present)
- 2008: 2008-2011. Member, MBA Curriculum Review Committee
- 2008-2009: Member, OGS/SSHRC Graduate Students Review Committee
- 2008-2009: Member, Mission/Vision Committee
- 2007-2008: Member, MBA Steering Committee

Promotion/Tenure Committees:

- 2010-2011: Member, Promotion Committee

Student Program Advising:

- 2007: 2007-2011. Faculty Advisor, National Capital Leadership Challenge

Chair:

- 2013: Chair, Research Committee
- 2011: Chair, MBA Committee
- 2009: Chair, OGS/SSHRC Review Committee

Unassigned

University Assignments

University Level Committees (Carleton University):

- 2013: Member, CREAD. (to present)
- 2013-2014: Member, Decanal Search Committee, Faculty of Graduate and Postdoctoral Affairs
- 2013-2014: Member, Decanal Review Committee, Sprott School of Business
- 2011-2012 – 2012-2013: Member, Graduate Faculty Board
- 2011: Member, Faculty of Graduate and Postdoctoral Affairs Academic Policy Committee. (to present)
- 2011: Member, Graduate Faculty Board Programs and Planning Committee. (to present)
- 2011: Member, Faculty of Graduate and Postdoctoral Affairs Council.(to present)
- 2010: Member, Senate Graduate Student Appeals Committee. (to present)
- 2008: Member, Management Board, Centre for Research and Education on Women and Work. (to present)

H. OTHER

Student Experience Activities

- 2015 - Coach JMUCC Team (2015) Montreal, Canada :

(Carleton University)

2014 - Coach, NIBs Team (2014). Gold Medal, London, England :

(Carleton University)

2008 - Mentor, Assistant Coach, Sprott Competes. (to present) : (Carleton University)

Student Recruitment/Outreach Activities

2009 - Faculty Representative, Carleton Parents Evening, Ottawa (2009, 2010) : Carleton University

2009 - Sprott Host, Carleton University Experience Day (2009, 2010)

2009 - Host, Sprott High School Partnership Conference (2009, 2010) : Carleton University

2009 - Faculty Representative, Carleton Parents Evening Toronto (2009) : Carleton University

2009 - Host, Sprott March Break Day (2009) : Carleton University

2009 - Host, Sprott Spring Information Night (2009) : Carleton University

Other Activities

2008 - Undergraduate Orientation (2008, 2009, 2010) : Sprott School of Business, Carleton University

2009 - Presentation to PhD Committee on the Academic Job Search (2009) : Sprott School of Business, Carleton University

2009 - Presenter, Sprott 1st year experience (2009) : Sprott School of Business, Carleton University

2009 - Session Chair, Sprott Doctoral Symposium (2008, 2009) : Sprott School of Business, Carleton University

Selected Media Appearances: Television

2011 - CTV News Channel with Jacqueline Milczarek : May 22

Selected Media Appearances: Radio

2012 - CBC Radio Adrien Lamb :

August

2012 - CBC Radio : March (Charlottetown, Karen Mair; Calgary, David Gray; Victoria, Jo-Ann Roberts, Moncton, Paul Castle; Yellowknife, Allison Devereux; Sydney, Wendy Bergfeldt; St. John's, Ted Blades; Regina, Craig Lederhouse; Edmonton, Peter Brown, Vancouver, Stephen Quinn)

2011 - John Tory Show : Newstalk 1010AM CFRB, Toronto, ON. Nov. 2

2011 - Mike Smyth Show : CKNW News Talk 980, Vancouver, BC. May 19

Selected Media Appearances: Print

2011 - Immen, Wallace (2011). Study of workplace priorities highlights generation gap : *Globe and Mail, Report on Business*, November 2, page B19.

2011 - Abma, Derek (2011). Employers must prepare to engage grouchy Generation Xers, study finds : *Ottawa Citizen*, November 3, page A1.

2011 - Richardson, Karen (2011). New Mobile Talent :

Your Workplace, October.

2011 - Immen, Wallace (2011) Women Expect Less, Right from the Start :

Globe and Mail, Report on Business, May 20, page B15.

Selected Media Appearances: Online

2011 - Dehaas, Josh, (2011) Students expect "shockingly" unrealistic paycheques :

Macleans.ca, November 1.

2011 - Boesveld, Sarah (2011) Study Finds Women Entering the Workforce Expect Less than Men : *National Post*, May 19.

2011 - Dehaas, Josh (2011) Women graduates expect to make less money : *Macleans.ca*, May 20.

2011 - Steele, Ken (2011) Study finds millennial women have lower workforce expectations than men :

Academica's Top Ten, May 20.

2011 - Jackson, Tara (2011) Women, work and wage gaps : *Research Works*, Carleton University, Summer.

2020 - Managers can learn from supervising remote workers during the coronavirus

Student Experience Activities

2023 - Coach, NIBs Case Competition Team : Dublin, Ireland

2023 - Coach, ROCA Case Competition Team - Organizing Committee : Coach ROCA Case Competition Team (Rotterdam, Carleton International Case Competition) Organizing Committee (2023).

Credentials

Curriculum Vitae - Sprott School of Business

Gregory Sears, PhD
Associate Professor - Tenured, 2011
Sprott School of Business (Management and Strategy)
Telephone: 613-520-2600 x3961
Email: greg.sears@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-8635-1471>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. McMaster University.

Title: *Dissertation Title: "The Dispositional Antecedents of Leader-Member Exchange and Organizational Citizenship Behaviour: A Process Perspective."*

Advisor: Dr. Rick Hackett

Master of Science. University of Waterloo.

Title: *"Personality Assessment in the Employment Interview: Conscientiousness and the Similar-to-Me Effect."* Advisor: Dr. Patricia Rowe

Bachelor of Arts. St. Mary's University.

Title: *(Honours First Class) Thesis Title: "The Big Five Personality Constructs in Relation to Academic Performance and the Influence of Vocational Interests on Profile and Performance Variability."* Advisor: Dr. Victor Catano

B. EMPLOYMENT

Academic Appointments

Associate Professor, Sprott School of Business, Carleton University (2012 - Present), Ottawa, Canada-Ontario.

Visiting Scholar, Rowe School of Management, Dalhousie University (2012 - 2013), Halifax, Canada-Nova Scotia.

Assistant Professor, Sprott School of Business, Carleton University (2006 - 2011), Ottawa, Canada-Ontario. Tenured in 2011

Other Employment

Personnel Psychologist, Personnel Psychology Centre (PPC), Public Service Commission of Canada (PSC) (1998 - 2006), Ottawa, Canada-Ontario.

- Consulted to corporate and departmental clients regarding selection, promotion, and performance measurement (i.e. 360-degree leader assessment) processes.
- Developed assessment tools for use in various departmental staffing processes and management developmental programs (e.g. application forms, leadership experience screens, structured interviews, oral and written simulations, structured reference checks).
- Served as an interviewer and assessor in various managerial staffing processes.
- Conducted psychometric analyses and applied research on PPC assessment tools.

C. PROFESSIONAL HONOURS

2023: Best Overall Conference Paper Award, EDI Conference (Declined), 16th Equality, Diversity, and Inclusion Conference.

2018: Best Paper Award, Gender and Diversity Division, 32nd Annual Australian and New Zealand Academy of Management (ANZAM) Conference.

2016: Faculty Graduate Mentoring Award, Carleton University.

2012: Best Paper Award, International Diversity Management Division, EDI Conference.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		12		12
Articles-in-Progress (All)		2		2
Publications in Conference Proceedings (Refereed)	1	3		4
Paper Presentations (Refereed)		6		6
Grants - Funded (both refereed and non-refereed)		2		2

Totals	1	25	26

Refereed Scholarly Publications

Articles in Refereed Journals

Ng, E.S., Sears, G., & Arnold, K. (2024). Who does diversity better? The role of servant leaders in promoting diversity management across public and private sector organizations. *Public Administration Quarterly*, 48 (4). [A]

Han, Y., & Sears, G. (2023). Does leader-member exchange ambivalence hinder employee well-being? Exploring relations with work engagement and emotional exhaustion. *Stress and Health*. [A]

Early View

Online Version of Record before inclusion in an issue

Han, Y., Gulanowski, D., & Sears, G. J. (2022). International student graduates' workforce integration: A systematic review. *International Journal of Intercultural Relations*, 85, 163-189. [A]

Han, Y., Sears, G., Dahr, W., & Wang, D. (2022). Facilitating cross-cultural adaptation: A meta-analytic review of dispositional predictors of expatriate adjustment. *Journal of Cross-Cultural Psychology*, 53 (9), 1054-1096. [A]

Smith, C., Han, Y., Dupre, K., & Sears, G. (2022). Perceived organizational support and its interaction with voice on police officers' organizational cynicism, stress, and emotional exhaustion. *Policing: An International Journal*, 45 (2), 200-217. [B]

Zhang, H., Nardon, L., & Sears, G. (2022). Migrant Workers in Precarious Employment: A narrative review. *Equality, Diversity and Inclusion*, 41 (2), 254–272. [B]

Published with DOI Volume assigned in 2022

Ng, E.S.W., Sears, G., & Arnold, K.A (2021). Exploring the influence of CEO and chief diversity officers' relational demography on organizational diversity management: An identity-based perspective. *Management Decision*, 59 (11), 2583-2605. [B]

Published 2022 Update

FORTHCOMING Added in July 2021, not sent in original 2020 submission by Faculty member, payment pending

Han, Y., Chaudhury, T., & Sears, G. (2021). Does career resilience promote subjective well-being? Mediating effects of career success and work stress on the career resilience – life satisfaction relationship. *Journal of Career Development*, 48 (4), 338-353. [B]

Sears, G., & Han, Y. (2021). Do employee responses to organizational support depend on their personality? The joint moderating role of conscientiousness and emotional stability. *Employee Relations*, 43 (5), 1130-1146. [B]

Sears, G., Ng, E., & Backkaloglu, M. (2021). White and minority employee reactions to perceived discrimination at work: evidence of White fragility? *International Journal of Manpower*, 42 (4), 661-682. [A]

Article entered on July 2021, hasn't been paid.

Rajendran, D., Ng, E.S.W., Sears, G., & Ayad, N. (2020). Determinants of migrant career success: A study of recent skilled migrants in Australia. *International Migration*, 58 (2), 30-51. [A]

Han, Y., & Sears, G. (2020). Exploring the role of vocational interests in balancing work and family demands: Do the RIASEC types predict work–family conflict? *Journal of Employment Counseling*, 57 (2), 66-84. [A]

Ng, E.S.W., & Sears, G. (2020). Walking the talk on diversity: CEO beliefs, moral values, and the implementation of workplace diversity practices. *Journal of Business Ethics*, 164 (3), 437-450. [A,FT50]

Sears, G., Shen, W., & Zhang, H. (2018). When and why are proactive employees more creative?: Investigations of relational and motivational mechanisms and contextual contingencies in the East and West. *Journal of Applied Social Psychology*, 48 (11), 593-607. [B]

Han, Y., Sears, G., & Zhang, H. (2018). Revisiting the. *Personnel Review*, 47 (2), 555-571. [A]

Ng, E.S.W., & Sears, G. (2017). The glass ceiling in context: The influence of CEO gender, recruitment practices, and firm internationalization on gender representation in management. *Human Resource Management Journal*, 27 (1), 133–151. [A]

Sears, G., Zhang, H., & Han, Y. (2016). Negative affectivity as a moderator of perceived organizational support – work outcome relationships. *Personality and Individual Differences*, 98, 257-260. [A]

Ng, E. S., & Sears, G. J. (2015). Toward representative bureaucracy: Predicting public service attraction among underrepresented groups in Canada. *Review of Public Personnel Administration*, 35 (4), 367-385. [B]

McPhee, D. M., Sears, G. J., & Wiesner, W. H. (2014). Independent and joint effects of personality on intentions to become an active participant in local union activities in Canada. *Journal of Psychology*, 148 (2), 145-159. [C]

Sears, G. J., Zhang, H., Wiesner, W. H., Hackett, R. D., & Yuan, Y. (2013). A comparative assessment of videoconference and face-to-face employment interviews. *Management Decision*, 51 (8), 1733-1752. [B]

Ng, E. S., & Sears, G. J. (2012). CEO leadership styles and the implementation of organizational diversity practices: Moderating effects of social values and age. *Journal of Business Ethics*, 105 (1), 41-52. [A,FT50]

Sears, G. J., & Hackett, R. D. (2011). The influence of role definition and affect in LMX: A process perspective on the personality – LMX relationship. *Journal of Occupational and Organizational Psychology*, 84 (3), 544-564. [A]

Tasa, K., Sears, G. J., & Schat, A. C. (2011). Personality and teamwork behavior in context: The cross-level moderating role of collective efficacy.

Journal of Organizational Behavior, 32 (1), 65-85. [A+]

Sears, G. J., & Baba, V. V. (2011). Toward a multi-stage, multi-level theory of innovation. *Canadian Journal of Administrative Sciences*, 28 (4), 357-372. [B]

Hayibor, S., Agle, B., Sears, G. J., Sonnenfeld, J. A., & Ward, A. (2011). Value congruence and charismatic leadership in CEO – top manager relationships: An empirical investigation. *Journal of Business Ethics*, 102 (2), 237-254. [A,FT50]

Sears, G. J., & Holmvall, C. M. (2010). The joint influence of supervisor and subordinate emotional intelligence on leader-member exchange. *Journal of Business and Psychology*, 25 (4), 593-605. [A]

Ng, E. S., & Sears, G. J. (2010). The effect of adverse impact in selection practices on organizational diversity: A field study. *International Journal of Human Resources Management*, 21 (9), 1454-1471. [A]

Ng, E. S., & Sears, G. J. (2010). What women and ethnic minorities want. Work values and labour market confidence: A self-determination perspective. *International Journal of Human Resources Management*, 21 (5), 677-699. [A]

Articles in Refereed Conference Proceedings

Full Paper

Ng, E.S.W, Sears, G., & Arnold, K. (in press, 2023). Who does diversity better? The influence of servant leadership and inclusive practices on minority representation in public vs. private sector organizations. *Equality, Diversity and Inclusion (EDI) International Conference*.

Best Overall Conference Paper Award, EDI Conference (Declined)

Han, Y., Gulanowski, D., & Sears, G. (2021). International graduates' workforce integration: A systematic literature review. *Administrative Sciences Association of Canada*.

Han, Y., & Sears, G. (2019). Exploring the role of vocational Interests in balancing work and family demands: Do the RIASEC types predict work–family conflict? *Administrative Sciences Association of Canada (ASAC)*.

Proceedings of the Annual Conference for the Administrative Sciences Association of Canada, St. Catharines, ON.

Ng, E. S., Sears, G., & Arnold, K. A. (2019). Exploring the influence of CEO and Chief Diversity Officers' relational demography on organizational diversity management: An identity-based perspective. *European Academy of Management Conference*.

Proceedings of the European Academy of Management Conference, Lisbon, Portugal

Han, Y., & Sears, G. (2019). Exploring the role of vocational interests in balancing work and family demands. *Annual Atlantic School of Business Conference*.

Proceedings of the 49th Annual Atlantic School of Business Conference, Sydney, NS

Ng, E.S. W., Arnold, K., & Sears, G. (2018). The Multicultural Policy Index. *Academy of Management*.
Chicago, IL

Rajendran, D., Ng, E.S.W., Sears, G., & Ayad, N. (2018). Determinants of migrant career success: A study of recent skilled migrants in Australia. *Australian and New Zealand Academy of Management*.

Best Paper Award, Gender and Diversity Division. Auckland, New Zealand

Ng, E.S. W., Sears, G., & Bakaloglu, M. (2018). Racial differences in the effects of perceived discrimination among White and minority employees: Evidence of White fragility. *European Academy of Management (EURAM) Conference*.

Reykjavik, Iceland.

Arnold, K., Ng, E.S.W, & Sears, G. (2017). The influence of CEO and AA Officers' relational demography on organizational diversity management. *Equality, Diversity and Inclusion (EDI) International Conference*.

London, UK

Han, Y., Sears, G., & Zhang, H. (2017). Revisiting the "give and take" in LMX: Exploring equity sensitivity as a moderator of the influence of LMX on affiliative and change-oriented OCB. *Annual Conference of the Administrative Sciences Association of Canada*.

Quebec City, QC

Sears, G. J., & Zhang, H. (2015). The moderating role of negative affectivity on POS –work outcome relationships. *European Congress of Work and Organizational Psychology (EAWOP)*.

Oslo, Norway.

Ng, E. S., & Sears, G. J. (2013). Toward representative bureaucracy: Predicting public service attraction among underrepresented groups in Canada. *Equality, Diversity and Inclusion (EDI) International Conference*.

Athens, Greece.

Ng, E. S., & Sears, G. J. (2012). The glass ceiling in context: The role of organizational characteristics and firm internationalization in advancing women into management. *Equality, Diversity and Inclusion (EDI) International Conference*.

Toulouse, France. Best Paper Award, International Diversity Management, EDI Conference.

Ng, E. S., & Sears, G. J. (2012). Advancing women into management: Strategic choice and environmental determinism. *Administrative Sciences Association of Canada (ASAC)*.

St. John's, Newfoundland, Canada.

Sears, G. J., Zhang, H., & Wiesner, W. H. (2011). Applicant reactions to videoconference interviews: A conduit or barrier to effective recruitment?

European Congress of Work and Organizational Psychology (EAWOP).
Maastricht, Holland.

Abstract Only

Zheng, C., Sears, G.J., & Han, Y. (2024). Exploring perspective-taking in relation to unethical pro-supervisor behaviour: Gauging the roles of moral disengagement and ethical leadership. *Annual Conference of the Administrative Sciences Association of Canada*.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Han, Y. & Sears, G.J. (2024). *Does leader-member exchange ambivalence hinder employee well-being?* Association of Psychological Science Conference, San Francisco, California.

Sears, G., Han, Y., Dahr, G.J., & Wang, D. (2023). *Facilitating cross-cultural adaptation: A meta-analytic review of dispositional predictors of expatriate adjustment*. Convention for the Society for Personality and Social Psychology, Atlanta, Georgia.

Sears, G., Ng, E.S.W., & Arnold, K. (2023). *Extending leadership theorizing in diversity scholarship: Findings from public and private sector organizations*. Annual European Group for Organizational Studies (EGOS), Cagliari, Italy.

Zhang, H., Nardon, L., & Sears, G. (2021). *Migrant workers in precarious employment: A narrative review*. Academy of International Business, Virtual, Virtual.

Han, Y., Gulanowski, D., & Sears, G. (2021). *International graduates' workforce integration: A systematic literature review*. Administrative Sciences Association of Canada, Virtual, Virtual.

Han, Y. & Sears, G. (2020). *Do Holland's vocational personality types influence perceptions of work-family conflict?* Convention for the Society for Personality and Social Psychology, New Orleans, Louisiana.

Zhang, V., Sears, G., & Nardon, L. (2020). *Migrant workers in precarious employment: A narrative review*. European Academy of Management Conference, Virtual, Virtual.

Sears, G. (2018). *The joint moderating role of emotional stability and conscientiousness on the relationship between perceived organizational support and work outcomes*. Annual Conference of the Society for Affective Science, Los Angeles, California.

Chowdhury, T., Han, Y., & Sears, G. (2018). *Career resilience in relation to life satisfaction: Mediating effects of indicators of career success and work stress*. Canadian Conference on Positive Psychology, Toronto, Canada-Ontario.

Ng, E.S.W., Arnold, K., & Sears, G. (2017). *Global Diversity and Inclusion (D&I) Benchmarking*. Academy of Management Meeting, Atlanta, Georgia.

Ng, E.S.W. & Sears, G. (2017). *What the manager sees and hears: Taking cues from the CEO on diversity management*. European Academy of Management (EURAM) Conference, Glasgow, Scotland.

Sears, G. (2017). *Do personality traits moderate the POS – work outcome relationship? The amplifying effect of conscientiousness and emotional stability*. Convention for the Society for Personality and Social Psychology, San Antonio, Texas.

Han, Y. & Sears, G. (2016). *Psychological need fulfillment at work and life satisfaction: A self-determination theory perspective*. Canadian Conference on Positive Psychology, Niagara-on-the-Lake, Canada.

Description: 3rd annual

Sears, G. & Zhang, H. (2016, June). *Keeping calm and carrying on: The moderating role of negative affectivity on POS - work outcome relationships*. Canadian Psychological Association Annual Conference, Victoria, Canada-British Columbia.

Sears, G., Shen, W., & Zhang, H. (2016, April). *Exploring the proactive personality - creativity relationship: Mediating and moderating effects*. Society for Industrial & Organizational Psychology Annual Meeting, Anaheim, California.

Description: 31st Annual Conference for the Society for Industrial - Organizational Psychology.

Sears, G. & Ng, E. S. (2013, June). *Toward a representative bureaucracy: The influence of employment equity status and work values on public service attraction among student job seekers*. Canadian Psychological Association Annual Conference, Quebec City, Canada-Quebec.

Baba, V. V. & Sears, G. (2011, September). *Jugaad: Toward a theory of ingenuity and innovation*. Ingenuity Conference, Hamilton, Canada-Ontario.

Sears, G. & Ng, E. S. (2011, April). *CEO leadership and the implementation of organizational diversity practices*. Society for Industrial & Organizational Psychology Annual Meeting, Chicago, Illinois.

Description: 26th Annual Conference for the Society for Industrial - Organizational Psychology.

Hayibor, S., Sears, G., & Wasieleski, D. M. (2010). *Value Congruence as a Determinant of Charisma in CEOs' Relationships with their Top Managers*. International Society for the Study of Organizational and Work Values (ISSWOV), Estoril, Portugal.

Sears, G. & Hackett, R. D. (2010). *A process perspective on the personality – leader-member exchange relationship*. Annual Conference of the Society for Industrial and Organizational Psychology, Atlanta, Georgia.

Sears, G. & Ng, E.S. W. (2010). *The relationship between CEO leadership styles and organizational diversity practices: The moderating role of social*

values and age. Academy of Management Meeting, Montreal, Canada-Quebec.

Contract or Other Research

Research Grants and Awards

Grants

2026 [Year 5 of 5]: Sears, G. Insight Grant (\$34,662.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2025 [Year 4 of 5]: Sears, G. Insight Grant (\$34,662.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2024 [Year 3 of 5]: Sears, G. Insight Grant (\$34,662.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2023 [Year 2 of 5]: Sears, G. Insight Grant (\$34,662.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2022 [Year 1 of 5]: Sears, G. Insight Grant (\$34,662.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Funded]

2020: Sears, G. Insight Grant (\$24,491.00), Principal Investigator, Dalhousie University. [Status: Funded]

2020: Sears, G. Accelerate (\$90,000.00), Principal Investigator, Mitacs. [Status: Funded]

2018: Sears, G. TalentEdge Internship Program (TIP) (\$10,000.00), Principal Investigator, OCE: Ontario Centres of Excellence. [Status: Funded]

2018: Sears, G. TalentEdge Internship Program (TIP) (\$10,212.00), Principal Investigator, VigilantCS. [Status: Funded]

2016 [Year 3 of 3]: Sears, G. Insight Grant (\$61,245.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2015 [Year 2 of 3]: Sears, G. Insight Grant (\$61,245.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2015: Sears, G. Insight Grant (\$179,739.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2014 [Year 1 of 3]: Sears, G. Insight Grant (\$61,245.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Member: Committee/Task Force

2010 – 2020: Society for Human Resource Management.

2010 – 2020: Human Resources Professional Association.

Scholarly Work in Progress

Papers Under Review

Ng, E. S., Sears, G., & Arnold, K. A. (2019). "Exploring the influence of CEO and Chief Diversity Officers' relational demography on organizational diversity management: An identity-based perspective," Revision under 3rd review to *Management Decision*.

Rajendran, D., Ng, E.S W., & Sears, G. (2018). "Determinants of migrant career success: A study of recent skilled migrants in Australia," Initial submission to *International Migration*.

Ng, E.S W., Sears, G., & Baggaloglu, M. (2018). "White and minority employee reactions to perceived discrimination at work: Evidence of White fragility?," Initial submission to *Social Forces*.

Han, Y., Chowdhury, T., & Sears, G. (2018). "Does career resilience promote subjective well-being? Mediating effects of career success and work stress on the career resilience – life satisfaction relationship," 1st revise and resubmit to *Journal of Career Development*.

Sears, G. (2018). "Do employee responses to organizational support depend on their personality? The joint moderating role of conscientiousness and emotional stability," Initial submission to *Personnel Review*.

Ng, E.S.W. & Sears, G. (2018). "Taking cues from the CEO: Exploring the role of HR managers' perceptions of their CEO's commitment to diversity on the implementation of workplace diversity practices.," Initial submission to *Human Resource Management Journal*.

Sears, G. (2018). "The joint moderating role of conscientiousness and emotional stability on the relationship between POS and work outcomes.," Initial submission to *Journal of Personnel Psychology*.

Working Papers

Han, Y. & Sears, G. (2023). "Does leader-member exchange ambivalence hinder employee well-being?." Description: San Francisco, CA.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI5181	Seminar in Management II - Current Trends in Organizational Behaviour	0.5	2	Main	100%
2024/Winter	BUSI6101	Current Topics in Organizational Behaviour	0.5	2	Main	100%
2023/Fall	BUSI3102	Human Resources Management	0.5	61	Main	100%
2023/Fall	BUSI3102	Human Resources Management	0.5	59	Main	100%
2023/Winter	BUSI6101	Current Topics in Organizational Behaviour	0.5	8	Main	100%
2022/Fall	BUSI3102	Human Resources Management	0.5	59	Main	100%
2022/Fall	BUSI3102	Human Resources Management	0.5	61	Main	100%
2022/Winter	BUSI6101	Current Topics in Organizational Behaviour	0.38	6	Main	76%
2022/Winter	BUSI5181	Seminar in Management II - Current Trends in Organizational Behaviour	0.12	2	Main	24%
2021/Fall	BUSI3102	Human Resources Management	0.5	56	Main	100%
2021/Fall	BUSI3102	Human Resources Management	0.5	53	Main	100%
2019/Fall	BUSI3102	Human Resources Management	0.5	60	Main	100%
2019/Fall	BUSI3102	Human Resources Management	0.5	62	Main	100%
2019/Fall	BUSI6101	Current Topics in Organizational Behaviour	0.5	11	Main	100%
2018/Fall	BUSI3102	Human Resources Management	0.5	59	Main	100%
2018/Fall	BUSI3102	Human Resources Management	0.5	59	Main	100%
2018/Fall	BUSI3102	Human Resources Management	0.5	59	Main	100%
2018/Winter	BUSI3102	Human Resources Management	0.5	59	Main	100%
2018/Winter	BUSI3102	Human Resources Management	0.5	60	Main	100%
2018/Winter	BUSI3102	Human Resources Management	0.5	60	Main	100%
2017/Fall	BUSI6101	Current Topics in Organizational Behaviour	0.5	5	Main	100%
2016/Fall	BUSI3102	Human Resources Management	0.5	59	Main	100%
2016/Fall	BUSI3102	Human Resources Management	0.5	60	Main	100%
2016/Fall	BUSI3102	Human Resources Management	0.5	60	Main	100%
2016/Winter	BUSI3102	Human Resources Management	0.5	41	Main	100%
2016/Winter	BUSI3102	Human Resources Management	0.5	80	Main	100%
2015/Fall	BUSI6101	Current Topics in Organizational Behaviour	0.5	5	Main	100%

Service to the institution (Academic)**Faculty Assignments****MBA Projects:**

2011-2012: Hadi Ahmadi

Masters Thesis Committees:

2012-2013: Tim Haats

2009-2010: Elisa Cass

PhD. Comprehensive Committees:

2017-2018: Llynne Plante

2017-2018: Sean Campeau
2017-2018: Rebecca Stiles
2017-2018: Neil Cruickshank
2017-2018: Jade (Yu) Han
2016-2017: Bruce Squires

PhD. Thesis Committees:

2017-2018: Jeff Jackson
2016-2017: Zafor Ahmed
2016-2017: Gopi Sharma
2016-2017: Jade (Yu) Han
2016-2017: Muge Bakkaloglu
2014-2015: Maggie Stevenson

University Assignments

Masters Thesis Committees:

2019-2020: Chelsie Smith, M.A., Psychology-external examiner
2018-2019: Emrah Eren, external examiner
2018-2019: Demi Plagianakos, external examiner
2015-2016: Juniper Glass
2015-2016: Tiana Cheng

PhD. Thesis Committees:

2015-2016: Chantal Hermann

University Assignments

PhD. Thesis Committees:

2018-2019: Chris Harding, external examiner
2013-2014: Deanna Whelan

University Assignments

PhD. Thesis Committees:

2021-2022: Jessica Sorenson, Psychology, University of Guelph

University Assignments

PhD. Thesis Committees:

2011-2012: Judith Godin

External Committees

Thesis Assignments

Masters Thesis Committees:

2016-2017: Amanda McEvoy
2012-2013: Chunyun Ma

Thesis Assignments

Masters Thesis Committees:

2017-2018: Gary Lawlor

Thesis Assignments

Masters Thesis Committees:

2017-2018: Hannah Brazeau

Thesis Assignments

Masters Thesis Committees:

2014-2015: Robin Young

Thesis Assignments**Masters Thesis Committees:**

2011-2012: Seneca Brandigampola

2011-2012: Warren Armstrong

PhD. Thesis Committees:

2017-2018: Aleka MacLellan

G. ADMINISTRATIVE RESPONSIBILITIES**Service to the Institution (Administrative)****Carleton University****Faculty Assignments****Chair:**

2024-2025: CTPC I Committee

2022-2023: Tenure & Promotion Committee – Departmental (Cluster I)

2017-2018 – 2020-2021: Graduate Awards Committee

Credentials**Professional Memberships**

Academy of Management, N/A

Administrative Sciences Association of Canada, N/A

Canadian Psychological Association, N/A

European Association of Work and Organizational Psychology, N/A

Human Resources Professional Association – Ottawa Chapter, N/A

Ottawa Industrial-Organizational Psychology Group, N/A

Society for Industrial and Organizational Psychology, N/A

Skills**Languages**

English

Curriculum Vitae - Sprott School of Business

Robert Smart, PhD
Associate Professor, Teaching Stream - Tenured, 2020
Sprott School of Business (Management and Strategy)
Telephone: 613-520-2600 x1124
Email: robert.smart@carleton.ca
AACSB Qualification: Practice Academic (PA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Carleton University.

Title: *Dissertation: A Longitudinal Case Study of a Public Sector Change Team*

Master of Business Administration. Sprott School of Business, Carleton University.

Title: *Emotional Intelligence and Varsity Athletes CIS Top 8 RBC Academic All-Canadian 2003*

Bachelor of Commerce. Sprott School of Business, Carleton University.

Title: *High Honours. Academic All-Canadian.*

Professional Certifications

Sport Technician Basketball (Spain), Level 1, 2022, Spanish Education, Culture and Sports Ministry.

B. EMPLOYMENT

Academic Appointments

Visiting Scholar, Spanish Education (September, 2023 - Present), Spain, Spain.

Assistant Coach, U18 Canarias Basketball Club (2022 - Present), La Laguna, Spain. As the Assistant Coach for the 2022-2023 season at the Canarias Basketball Club (www.cbcanarias.net) I am learning new techniques and strategies for team building and motivation. In addition, I am learning how to contribute to a team in a new language and culture. The experience of being working as a coach in a new language and culture, has been immensely challenging and given me a new perspective on teamwork that I look forward to bringing into my teaching.

Instructor, Sprott School of Business, Carleton University (2012 - Present), Ottawa, Canada-Ontario.

- Management and Strategy: I am in my sixth year as an instructor at the Sprott School of Business. During this term appointment I have taught undergraduate courses in Organizational Behaviour (BUSI 2101), Managing Individuals (BUSI 3104), Managing Teams (BUSI 3105), Designing Organizational Systems (BUSI 3602), Creative Thinking: Courts for Change (BUSI 4117), MGMT 5100V Managing People and Training and Development (BUSI 4111). I have taught Managing People and Organizations (MGMT 5100) in the full-time MBA program and the new Online MBA program.
- Confirmation awarded in 2020
- **BUSI 4905 Directed Studies:** I have taught 20 directed study courses. Each course is unique and must be tailored to the learning objectives of the student. For example, in one directed study were able to explore more research focused content on teamwork and find a team with a major consulting firm for the final project. The process of engaging students in real research projects has been a very rewarding one. In 2022, two of my directed study students helped to co-design a high school social entrepreneurship course with our partner community in Haida Gwaii, British Columbia.
- **MGMT5100 Managing People and Organizations (MBA):** I have taught MGMT 5100 two times in the MBA. The course was tailored to the online environment and featured industry guest speakers, applied learning and community building discussion sessions. They course was very well received and a highlight of my 2020-2022 pandemic teaching experience.
- **MGMT5100V Managing People and Organizations (Online MBA):** One of the most interesting challenges of my career, MGMT 5100V is a course that I have designed and taught two times over the past year for the new Sprott Online MBA. The course engages students with experiential learning, storytelling, shared discussion, and perspectives from academics and industry experts on managing in the workplace. The course has over 120 students and has been adapted to support higher enrollment.
- **BUSI 4111 Training & Development:** I coordinate the BUSI4111/BUSI2101 program at Sprott. The experience has allowed me to develop skills planning for a multi-section course and managing a budget and team. Co-teaching with another faculty member, I am responsible for selecting and developing twenty-two of the top students in our Business program into interactive teachers for our BUSI 2101 Introduction to Organizational Behaviour class. The full year course explores training and development fundamentals from academic and practitioner views and offers students an incredible opportunity to learn from teaching their own interactive training session. We have moved fully adapted the course to be online or in person to connect our students in a variety of ways.
- **BUSI 4117 Creative Thinking:** I coordinate the BUSI4117 Creative Thinking: Courts for Change program at Sprott. The course is an

interdisciplinary learning experience that partners Sprott Business students with varsity athletes and students from specialized programs around the university to offer infrastructure and programming support in the areas of sport, health, and community wellness. In 2021, we are partnered with communities in Haida Gwaii, BC and Mayo, Yukon. We have also partnered with Shopify to help our community partners and Carleton students earn accreditation while building an online store. In 2022, we travelled to Haida Gwaii and the Yukon to build community partnerships and support student project work

- **BUSI 3602 Designing Organizational Systems:** In Winter 2016 & Winter 2017 I taught this course for the Department of Public Affairs and Policy Management. I really enjoyed the different perspectives that PAM students brought to the Management discussion. The course combined traditional lectures with guest speakers, experiential learning exercises, and interactive discussion sessions.
- **BUSI 3105 Managing and Motivating Teams:** I have taught this course five times in my career (2012, 2013, 2014, 2015, 2018, 2019, 2020, 2021, 2022). I was responsible for the planning and delivery of this third-year course which involved traditional lectures, weekly team competitions, role play, experiential learning and extensive group work. In 2022, we moved our course back in person and retained some of the best feature of the online course from the pandemic. In addition, I developed a model for co-teaching the course with an industry professional. The course was a success with students learning from consultants from Deloitte and Accenture about teamworking. In our final impact project, we connected student groups with real organizations to support real world consulting projects.
- **BUSI 3104 Managing Individual Performance:** I have taught this course seven times in my career. I was responsible for the planning and delivery of this third-year course which involved traditional lectures, extensive self-assessment, personal development, role play, experiential learning and group work. In 2021, we moved our entire course online and incorporated an interactive guest speaker series and new interactives to engage students in the material.
- **BUSI 2101 Introduction to Organizational Behaviour:** I have taught this course 15 times in my career (twice in 2007, 2008, twice in 2011, twice in 2012, 2013, 2017, 2018, 2019, 2021, 2022) and served as the course coordinator from 2015-2021. I was responsible for the planning and delivery of this second-year course which involved traditional lectures, guest lectures, role playing exercises, and group work.
- **BUSI 3102 Introduction to Human Resources:** I have taught this course three times in my career (twice in 2007, once in 2008). I was responsible for the planning and delivery of this third-year course which involved traditional lectures, a semester long simulation exercise, role playing exercises, guest lectures, team teaching, and group work.
- **BUSI 3105 Organizational Theory:** I have taught this course once in my career (2008). I was responsible for the planning and delivery of this third-year course which involved traditional lectures and group work.
- **BUSI 4112 Organizational Leadership:** I have been a guest lecture for this course. The focus of my lecture was on team leadership in a competitive environment.

Other Employment

Associate Coach, Carleton University Men's Basketball (2004 - Present), Ottawa, Canada-Ontario. A major part of my contribution to the Carleton University campus over the past eleven years has been my work as the associate/assistant coach for our Men's Basketball Team. Our team has been the most successful team in CIS history, winning 16 of the last 19 National Championships. I have used my position as basketball coach to infuse my research and my lectures with passion and practical lessons that transfer from the competitive playing field to the business arena.

Assistant Coach, Team Canada Men's U17 Team (2016 - 2018), Ottawa, Canada. As the Assistant Coach for the 2017 U17 Men's National Team won a silver medal in the FIBA Americas Championship in Formosa, Argentina. I continue to be involved in Basketball Canada's development program. The experience of competing for my country and gaining international coaching experience was a rewarding and highly developmental for me as both a coach and an educator.

Interim Head Coach, Carleton Men's Basketball, Carleton University (2015 - 2016), Ottawa, Canada-Ontario. As the interim Head Coach for the 2015-2016 our team was successful in our season, winning the national championship. The experience of being the head coach gave me a new perspective on teamwork that I look forward to bringing into my teaching.

Project Lead, Alliance of Sector Councils Canada (2010 - 2012), N/A, Canada.

Teaching Assistant, Carleton University (2004 - 2008), Ottawa, Canada-Ontario.

PhD Directed Study, Carleton University (2004), Ottawa, Canada-Ontario. PhD Directed Study - Front-Line Managers and Organizational Change

C. PROFESSIONAL HONOURS

2020: Sprott Teaching Award, Sprott School of Business, Carleton University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Refereed Scholarly Publications

Articles in Refereed Journals

Duxbury, L., Higgins, C., Smart, R., & Stevenson, M. (2014). Mobile Technology and Boundary Permeability. *British Journal of Management*, 25 (3), 570-588. [A]

Duxbury, L., Higgins, C., & Smart, R. (2011). Elder Care and the Impact of Caregiver Strain on the Health of Employed Caregivers. *Work: A Journal of Prevention, Assessment and Rehabilitation*, 40 (1), 29-40. [C]

Articles in Refereed Conference Proceedings

Full Paper

Smart, R., & Duxbury, L. (2010). A Longitudinal Case Study of a Public Sector Change Team. *Administrative Sciences Association of Canada (ASAC)*.

Regina, Saskatchewan.

Chapters in Edited Books

Duxbury, L., & Smart, R. (2011). The Myth of Separate Worlds: An Exploring of How Mobile Technology has Redefined Work-family Balance. In Stephan Kaiser, Max Ringlstetter, Miguel Pina e Cunha, Doris Ruth Eikhof (Ed.), *Creating balance? International Perspectives on the Work-Life Integration of Professionals* (pp. 269-284). Springer Publications. [Status: Published]

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Scholarly Work in Progress

Working Papers

Smart, R. (2018). "Implementing Organizational Change with Teamwork: The Case of Shared Services Canada.," targeted for British Journal of Management.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4117	Creative Thinking	0.5	16	Main	100%
2024/Winter	BUSI4111	Training and Development	0.25	12	Main	50%
2024/Winter	BUSI2101	Organizational Behaviour	0.25	92	Main	50%
2024/Winter	BUSI4117	Creative Thinking	0.5	13	Main	100%
2023/Fall	BUSI2101	Organizational Behaviour	0.25	112	Main	50%
2023/Fall	MGMT5100	Managing People & Organizations	0.5	236	Main	100%
2023/Fall	BUSI4117	Creative Thinking	0.5	13	Main	100%
2023/Fall	BUSI4117	Creative Thinking	0.5	16	Main	100%
2023/Fall	BUSI4111	Training and Development	0.25	12	Main	50%
2023/Summer	MGMT5100	Managing People & Organizations	0.5	170	Main	100%
2023/Winter	MGMT5100	Managing People & Organizations	0.5	32	Main	100%
2022/Fall	MGMT5100	Managing People & Organizations	0.5	117	Main	100%
2022/Summer	MGMT5100	Managing People & Organizations	0.5	44	Main	100%
2022/Winter	BUSI3105	Managing & Motivating Teams	0.5	50	Main	100%
2022/Winter	BUSI4111	Training and Development	0.25	10	Main	
2022/Winter	BUSI2101	Organizational Behaviour	0.25	80	Main	
2022/Winter	BUSI4117	Creative Thinking	0.5	8	Main	100%
2021/Fall	BUSI3104	Managing Individual Performance	0.5	34	Main	100%
2021/Fall	BUSI4117	Creative Thinking	0.5	8	Main	100%
2021/Fall	BUSI4111	Training and Development	0.25	10	Main	
2021/Fall	BUSI2101	Organizational Behaviour	0.25	91	Main	
2021/Summer	BUSI2101	Organizational Behaviour	0.5	48	Main	100%

2021/Winter	MGMT5100	Managing People & Organizations	0.5	25	Main	100%
2021/Winter	BUSI4117	Creative Thinking	0.25	5	Main	50%
2021/Winter	BUSI4111	Training and Development	0.25	20	Main	50%
2021/Winter	BUSI3105	Managing & Motivating Teams	0.5	50	Main	100%
2021/Winter	BUSI2101	Organizational Behaviour	0.25	174	Main	50%
2020/Fall	BUSI4111	Training and Development	0.25	20	Main	50%
2020/Fall	BUSI3104	Managing Individual Performance	0.5	44	Main	100%
2020/Fall	MGMT5100	Managing People & Organizations	0.5	28	Main	100%
2020/Fall	BUSI2101	Organizational Behaviour	0.25	165	Main	50%
2020/Fall	BUSI4117	Creative Thinking	0.25	5	Main	50%
2020/Summer	BUSI2101	Organizational Behaviour	0.5	72	Main	100%
2020/Winter	BUSI4111	Training and Development	0.25	10	Main	50%
2020/Winter	BUSI3105	Managing & Motivating Teams	0.5	59	Main	100%
2020/Winter	BUSI2101	Organizational Behaviour	0.25	95	Main	50%
2019/Fall	BUSI4111	Training and Development	0.25	10	Main	50%
2019/Fall	BUSI3104	Managing Individual Performance	0.5	59	Main	100%
2019/Fall	BUSI2101	Organizational Behaviour	0.25	88	Main	50%
2019/Winter	BUSI4111	Training and Development	0.25	10	Main	50%
2019/Winter	BUSI3105	Managing & Motivating Teams	0.5	57	Main	100%
2019/Winter	BUSI2101	Organizational Behaviour	0.25	77	Main	50%
2018/Fall	BUSI2101	Organizational Behaviour	0.25	119	Main	50%
2018/Fall	BUSI4111	Training and Development	0.25	11	Main	50%
2018/Fall	BUSI3104	Managing Individual Performance	0.5	44	Main	100%
2018/Summer	BUSI2101	Organizational Behaviour	0.5	38	Main	100%
2018/Winter	BUSI4111	Training and Development	0.25	11	Main	50%
2018/Winter	BUSI3105	Managing & Motivating Teams	0.5	60	Main	100%
2018/Winter	BUSI2101	Organizational Behaviour	0.25	64	Main	50%
2017/Fall	BUSI3104	Managing Individual Performance	0.5	57	Main	100%
2017/Fall	BUSI2101	Organizational Behaviour	0.25	116	Main	50%
2017/Fall	BUSI4111	Training and Development	0.25	11	Main	50%
2017/Summer	BUSI2101	Organizational Behaviour	0.5	47	Main	100%
2016/Fall	BUSI2101	Organizational Behaviour	0.5	218	Main	100%
2016/Fall	BUSI4111	Training and Development	0.5	23	Main	100%
2016/Fall	BUSI3104	Managing Individual Performance	0.5	53	Main	100%
2016/Winter	BUSI4111	Training and Development	0.05	2	Main	10%
2016/Winter	BUSI4111	Training and Development	0.45	19	Main	90%
2016/Winter	BUSI3602	Organizational Systems Design	0.5	95	Main	100%

2016/Winter	BUSI2101	Organizational Behaviour	0.5	246	Main	100%
2015/Fall	BUSI2101	Organizational Behaviour	0.5	233	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2020-2021: Tenure and Promotion Committee - Departmental (Cluster I)

H. OTHER

Student Experience Activities

2019 - Carleton Ravens Basketball – Community Events Programmer : 2005-2019

Credentials

Service to the Community

Other Community Service Activities

2004 – 2019: Easter Seals Camp Merrywood-Volunteer

Curriculum Vitae - Sprott School of Business

Sujit Sur, PhD
Associate Professor - Tenured, 2014
Sprott School of Business (Management and Strategy)
Telephone: 613-520-2600 x4003
Email: sujit.sur@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
Orcid: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Concordia University.

Title: *Thesis: For whom the firm toils? A thesis on ownership linkage to governance and performance. Winner of the Udayan Rege Best Dissertation in Administrative Sciences 2009-2011 John Molson School of Business, Concordia University, Montreal*

Master of Business Administration. Concordia University.

Title: *John Molson School of Business, Concordia University, Montreal*

Bachelor of Science. Jawaharlal Nehru University.

Title: *National Defense Academy*

Professional Certifications

Certified Design Thinking simulation training facilitator, 2013

B. EMPLOYMENT

Academic Appointments

Associate Professor (Sustainable Management), Sprott School of Business, Carleton Sustainable Energy Centre, Carleton University (2014 - Present), Ottawa, Canada-Ontario.

Adjunct Professor, Rowe School of Business, Dalhousie University (2014 - Present), Halifax, Canada-Nova Scotia.

Associate Professor (Strategy & Sustainability), Rowe School of Business & College of Sustainability, Dalhousie University (2013 - 2014), Halifax, Canada-Nova Scotia.

Assistant Professor (Strategy & Sustainability), Rowe School of Business & College of Sustainability, Dalhousie University (2009 - 2013), Halifax, Canada-Nova Scotia.

Lecturer (Strategy & International Business), Rowe School of Business, Dalhousie University (2008 - 2009), Halifax, Canada-Nova Scotia.

Lecturer/Part Time Instructor (Strategy & Organizational Behaviour), Dept. of Management, John Molson School of Business, Concordia University (2005 - 2008), Montreal, Canada-Quebec.

Other Employment

Consultant, Concordia Small Business Consulting Bureau (2002 - 2003), Montreal, Canada-Quebec.

Founder & Managing Partner, Kaveri Enterprises (Management & Placement Consultants) (1999 - 2001), New Delhi, India.

Commissioned Officer (Lieutenant Commander), Indian Navy (1986 - 1998), N/A, India.

C. PROFESSIONAL HONOURS

2022: Ontario Virtual Learning Strategy grant, Carleton University.

2021: Best Reviewer Award, Strategic Management Society.

2016: Grand Prix EFMD-FNEGE des meilleurs ouvrages de recherche en management for the Encyclopédie, Fondation Nationale pour l'Enseignement de la Gestion des Entreprises.

2016: Research Achievement Award, Carleton University.

2015: Outstanding Reviewer Award, SIM Division, Academy of Management.

2015: Best Reviewer Award, Journal of World Business.

2015: Elwood F. Holton, III Research Excellence Award, Human Resource Development Review Journal. For Outstanding Development Review. .

2015: Emerald Group Award of Excellence, The International Journal of Business in Society. Outstanding Paper in Corporate Governance.

2015: Best Paper Award, Canadian Journal of Administrative Sciences.

2014: Overall Best Paper Award, World Association for Sustainable Development.

2013: Faculty Teaching Excellence Award, Dalhousie University.

2013: MBA 2nd Year Professor of the Year Award, MBA Society, Dalhousie University.

2012: Best Reviewer Award, Administrative Sciences Association of Canada.

2012: A. Gordon Archibald Teaching Excellence Award, Dalhousie University.

2011: Professor of the Year Award, Commerce Society, Dalhousie University.

2011: Dean's Award, Successful Innovation of the Year, Dalhousie University.

2011: MBA 2nd Year Professor of the Year Award, MBA Society, Dalhousie University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	2			2
Articles-in-Progress (All)	6	2		8
Publications in Conference Proceedings (Refereed)		5		5
Totals	8	7		15

Refereed Scholarly Publications

Articles in Refereed Journals

Sur, S., Gassmann, H., & Zhang, J. (2019). Determining Ownership: An empirical assessment and validation of the ownership measure. *Canadian Journal of Administrative Sciences*, 36 (1), 5-19. [B]
Early View Online Version of Record before inclusion in an issue Published in March 2019

Deng, Q., Hine, M., Sur, S., & Ji, S. (2019). Inside the Black Box of Dictionary Building for Text Analytics: A Design Science Approach. *Journal of International Technology and Information Management*, 27 (3), 7. [C]
Updated on Jan 16, 2020 Forthcoming

Sur, S. (2017). Beyond the Indus: How Hinduism Offers an Alternate Management Paradigm. *Philosophy of Management*, 16 (1), 68-89. [C]

Sur, S., Magnan, M., & Cordeiro, J. (2015). Disentangling the determinants of CEO compensation: A simultaneous examination of time, industry, and firm-level influences. *Canadian Journal of Administrative Sciences*, 32 (1), 30-46. [B]

Sur, S. (2014). Making Sense of Board Effectiveness: A Socio-Cognitive Perspective. *Corporate Governance: the international journal of business in society*, 14 (2), 162-180. [B]

Sur, S., & Ng, E. (2014). Extending Theory on Job Stress: The Interaction Between The 'Other 3' and 'Big 5' Personality Traits on Job Stress. *Human Resource Development Review*, 13 (1), 79-101. [B]

Sur, S., & Martens, M. (2013). Whose Firm is it Anyway? Ownership Effect on IPO Performance. *Canadian Journal of Administrative Sciences*, 30 (4), 264-279. [B]

Sur, S., Lvina, E., & Magnan, M. (2013). Why do Boards Differ? Because Owners do: Assessing Ownership Impact on Board Composition. *Corporate Governance: the international journal of business in society*, 21 (4), 373-389. [B]

Sur, S., & Tetrault-Sirly, C. (2013). What's in a Name? Decomposing Corporate Reputation to Assess the Relative Impact of Temporal, Firm and Industry Level Factors. *Journal of Management and Governance*, 17 (4), 1047-1072. [C]

Tetrault-Sirly, C., & Sur, S. (2013). Strategies for Sustainability Initiatives: Why Ownership Matters. *Corporate Governance: the international journal of business in society*, 13 (5), 541-550. [B]

Carney, M., Gedajlovic, E., & Sur, S. (2011). Corporate Governance and Stakeholder Conflict. *Journal of Management and Governance*, 15 (3), 483-507. [C]

Articles in Refereed Conference Proceedings

Full Paper

Ratiu, C., Sur, S., & Lvina, E. (2022). Integrating business sustainability into the business curriculum: The CSR audit as pathway towards ESG literacy training. *International Association for Business and Society Conference*.

Sur, S. (2021). Social Manufacturing: Fulfilling the promise for economic and social upliftment at the BoP. *British Academy of Management Conference*.

Sur, S. (2021). Rethinking risk to transform business mindset for climate change mitigation and adaptation. *Strategic Management Society Meeting*.

Lvina, E., & Sur, S. (2019). Ensuring student flourishing in online business education: soft skills still matter. *IAJBS World Forum & CJBE South Asia Regional Chapter Meeting*.

Sur, S., & Lvina, E. (2019). Why university led innovation in conjunction with social entrepreneurship is key for the circular economy. *IAJBS World*

Forum & CJBSE South Asia Regional Chapter Meeting.

Sur, S. (2017). The elusive governance phenomenon: Epistemological insights from the old masters. *British Academy of Management Conference*. Coventry, UK.

Deng, Q., Hine, M., Sur, S., & Ji, S. (2017). Building an Environmental Sustainability Dictionary for the IT Industry. *Hawaii International Conference on System Sciences (HICSS)*.

Sur, S. (2016). Closing the loop in the circular economy: Are social entrepreneurship and universities the missing links for the sustainable business model for industrial ecology. *Journal of Cleaner Production Authors' Workshop*.
Special issue.

Sur, S., & Gagnon, C. (2015). Neoliberalism's impact on the governance paradigm: The ontology and epistemology of agency theory. *Philosophy of Management International Conference*.

Sur, S. (2015). From beyond the Indus: How Hinduism can offer an alternate management paradigm. *Philosophy of Management International Conference*.
Oxford, UK

Sur, S. (2015). Developing International Research Collaborations. *Academy of Management (AOM)*.
Professional Development Workshop at the Academy of Management Meeting, Vancouver, Canada

Sur, S., Gassmann, H., & Zhang, J. (2015). Defining Ownership: An empirical assessment and validation of the ownership measure. *Academy of Management Meeting*.
Vancouver, Canada

Sur, S. (2014). Cooperative capacity and sustainable transportation: An emerging business model. *World Association for Sustainable Development (WASD) Conference*.

Sur, S. (2012). Collaborative Sustainable Development: Innovation for achieving societal benefit, environmental protection and economic growth. *Academy of Business in Society*.
Lausanne, Switzerland.

Sur, S., & Tetrault, S. (2012). Sustainability early-movers: How strategies differ by ownership. *Academy of Business in Society*.
Lausanne, Switzerland

Sur, S., & Gassmann, H. (2012). Understanding Ownership: An empirical assessment and construct development. *Administrative Sciences Association of Canada (ASAC)*.

Sur, S. (2012). The Elusive Governance Phenomenon: New Insights from the Old Masters. *Administrative Sciences Association of Canada (ASAC)*.

Adams, M., & Sur, S. (2010). When industrial symbiosis meets social entrepreneurship: Value creation by combining social development, environmental protection and economic growth. *International Conference on Business and Sustainability*.
Portland, Oregon.

Chapters in Edited Books

Ratiu, C., Magnan, M., Kim, J., & Sur, S. (2014). Corporate governance in emerging markets: Agency and institutional relationships. In Chrysostome, E., Molz, R. & Li, Y (Eds.), *Building businesses in emerging & developing countries: challenges and opportunities* (pp. 281-296). Routledge. [Status: Published]

Sur, S. (2014). Stratégies de pensée Indienne: mise en abyme des pluralistes et multi-contextuel. In Tannery, F., Martinet, A-C. & Hafsi, T. (Eds.), *Encyclopédie de la stratégie* (pp. 283-302). Paris: Les éditions Vuibert. [Status: Published]

Sur, S. (2014). Uganda Venture: A sustainable microcredit initiative. *Globalens*. University of Michigan Press. [Status: Published]

Sur, S. (2012). Understanding Risk and Choice of Mitigation Strategies. In Stoner, J. & Wankel, C. (Eds.), *Managing Climate Change Business Risks & Consequences: Leadership for Global Sustainability* (pp. 17-48). Palgrave Macmillan. [Status: Published]
Description: Series on Global Sustainability through Business

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Associate Editor

2015 – 2021: Canadian Journal of Administrative Sciences (National).

Presentations

Other Presentations

Presentation

2016: United Nations Association in Canada. Invited speaker at the United Nations Association in Canada's panel titled "Global Goals, Local Action: A High-Level Forum on the UN Sustainable Development Goals".

2013: Academy of Management Meeting, Boston, Massachusetts. Fostering International Teaching and Research Collaborations

Contract or Other Research

Research Grants and Awards

Grants

2023 [Year 1 of 5]: Sur, S. Insight Grant, Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2023 [Year 1 of 3]: Sur, S. International Research Seed Grant, Principal Investigator, PRI-Carleton University. [Status: Not Funded]

2018 [Year 1 of 3]: Sur, S. & Giancarlo, M., Insight Development Grant, Collaborator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2017: Sur, S. Research Achievement Award (\$15,000.00), Principal Investigator, Carleton University, CORIS. [Status: Funded]

Other Professional Activities

Consulting Experience

2010: Halifax Carshare, Pro Bono consultant for developing a business model for fleet augmentation and revenue enhancement without incurring capital costs.

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2016: Administrative Sciences Association of Canada. Doctoral Consortium

2010: Administrative Sciences Association of Canada.

2010: Academy of Management.

Academic Conference: Moderator / Facilitator

2010: Administrative Sciences Association of Canada (ASAC), Regina, Canada-Saskatchewan. The Strategic Imperative of Sustainability. Organizer and Moderator

2010: Academy of Management Meeting, Montreal, Canada-Quebec. A call for strategic role of sustainability in academia and practice

Board Member: PRJ Editorial Review Board

2015 – 2022: Canadian Journal of Administrative Sciences.

2015 – 2017: Journal of World Business.

Board of Directors: Substantial Involvement

2011: Chartered Institute of Logistics and Transport North America.

Chair: Conference / Track / Program

2010 – 2015: Administrative Sciences Association of Canada. Session Chair

2010 – 2015: Academy of Management. Session Chair

2011: Administrative Sciences Association of Canada. Divisional Chair

2010: Administrative Sciences Association of Canada. Program Chair

Other Professional Service Activities

2022: Carleton Centre for Community Innovation, CU.

2015: Reviewer, Mitacs (Accelerate grant).

2012 – 2015: Social Sciences and Humanities Research Council (SSHRC). Reviewer, Research insight grant

Reviewer: Ad Hoc Reviewer for a Journal

2020: Corporate Social Responsibility and Environmental Management.

2014 – 2017: Journal of World Business.

2010 – 2016: Canadian Journal of Administrative Sciences.

2010 – 2013: Asia Pacific Journal of Management.

2010 – 2013: Journal of Management and Governance.

2010: Corporate Governance: An International Review.

Reviewer: Conference Paper

2017 – 2022: British Academy of Management.

2014 – 2022: Strategic Management Society.

2010 – 2015: Academy of Management.

2013 – 2014: Strategic Management Society.
 2010 – 2014: Administrative Sciences Association of Canada.
 2012 – 2013: Strategic Management Society.
 2011 – 2012: Strategic Management Society.
 2010 – 2011: Strategic Management Society.
 2010: Strategic Management Society.

Scholarly Work in Progress

Papers Under Review

Belhadi, A., Kamble, S., Gupta, S., Tan, B., & Sur, S. (2022). "An investigation of the environmental impact of the digital auto-governance of sharing economy platforms at the base of the pyramid," Initial submission to *Information Systems Journal*.

Sur, S. (2020). "Collaborative Sustainable Development: Innovation for achieving societal, environmental and economic growth," Initial submission to *Ecological Economics*.

Sur, S. (2020). "Risk mitigation: A unifying theory for corporate governance.," Initial submission to *Academy of Management Journal*.

Sur, S. (2019). "The ontology and epistemology of agency theory," Initial submission to *Journal of Business History*.

Sur, S. (2019). "Determinants of environmental, social and governance performance: A multilevel analysis," Initial submission to *Journal of Business Ethics*.

Sur, S. (2019). "Transitioning to renewable energy: The required business and societal (and not technological) changes required for microgrid adoption," Initial submission to *Technological Forecasting and Social Change*.

Sur, S. (2019). "How much does ownership matter? A hierarchy of temporal, institutional and governance influences on firm performance," Initial submission to *Corporate Governance: An International Review*.

Sur, S. (2019). "Governance in Dual Class Share Firms: Looking Beyond the Usual Suspect," Initial submission to *Corporate Governance: An International Review*.

Sur, S., Gassmann, H., & Zhang, J. (2017). "Determining Ownership: An empirical assessment and validation of the ownership measure.," Initial submission to *Canadian Journal of Administrative Sciences*.

Description: Revision submitted February 2017.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	BUSI4709	Strategic Management International Business	0.5	28	Main	100%
2024/Winter	BUSI5108	Sustainable Business Development	0.25	12	Main	100%
2023/Fall	STGY5903	Strategic Concepts	0.5	19	Main	100%
2023/Fall	BUSI3119	Business & Environmental Sustainability	0.5	46	Main	100%
2023/Winter	BUSI5108	Sustainable Business Development	0.25	7	Main	100%
2022/Fall	BUSI3119	Business & Environmental Sustainability	0.5	47	Main	100%
2022/Winter	BUSI5108	Sustainable Business Development	0.25	14	Main	100%
2022/Winter	BUSI3103	Introduction to Organizational Theory	0.5	60	Main	100%
2022/Winter	BUSI3103	Introduction to Organizational Theory	0.5	58	Main	100%
2017/Fall	BUSI5906	Special Topics	0.25	12	Main	100%
2017/Fall	BUSI5108	Sustainable Business Development	0.25	5	Main	100%
2017/Fall	BUSI3119	Business & Environmental Sustainability	0.5	45	Main	100%
2017/Winter	BUSI6103	Seminar in Strategic Management	0.5	4	Main	100%
2017/Winter	BUSI3119	Business & Environmental Sustainability	0.5	40	Main	100%
2016/Fall	BUSI5906	Special Topics	0.25	8	Main	100%
2016/Fall	BUSI5108	Sustainable Business Development	0.25	26	Main	100%
2016/Winter	STGY5900	Corporate & Business Strategy	0.5	10	Main	100%

2016/Winter	BUSI3119	Business & Environmental Sustainability	0.5	27	Main	100%
2015/Fall	BUSI5108	Sustainable Business Development	0.25	16	Main	100%
2015/Fall	BUSI5906	Special Topics	0.25	23	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Student Recruitment/Outreach Activities

2012 - Talk at Goresbrook Junior High school on the importance of sustainability mindset

Credentials

Professional Memberships

Academy of Business in Society, N/A

Academy of Management, N/A

Administrative Sciences Association of Canada, N/A

Certified Masters in Business Administration, N/A

Strategic Management Society, N/A

Professional Development

Instructional-Related Conference

2013: Babson College (Giving voice to values pedagogy). Participant at faculty exchange

Executive or Professional Education

2015 - Research facilitator, Future of Microgrids & Smart Energy Networks workshop. [Activity: Delivery of Professional Education]

Service to the Community

Other Community Service Activities

2021: Sustainability Enterprise Alliance, Advisor & Academic Liaison, SEA (Sustainability Enterprise Alliance), a social enterprise for capacity building, Ottawa

2021: Ahead.IT, Pro Bono Business Advisor (Operations)

Curriculum Vitae - Sprott School of Business

Stoyan Tanev, PhD
Associate Professor - Tenured, 2017
Sprott School of Business (Entrepreneurship)
Telephone: 613-520-2600 x8230
Email: stoyan.tanev@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-9895-5416>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Université Pierre et Marie Curie.

Doctor of Philosophy. Sofia University.

Title: *A degree awarded on the basis of a monograph focusing on the comparison of the the concepts of energy in physics, philosophy and theology*

Master of Arts. University of Sherbrooke, Sherbrooke.

Master of Engineering. Carleton University.

Title: *Master thesis: "Competitive intelligence information and innovation in small Canadian firms"*

Master of Science. Sofia University.

B. EMPLOYMENT

Academic Appointments

Adjunct Associate Professor, University of Southern Denmark (February, 2018 - Present), Odense, Denmark.

- Integrating transnational entrepreneurship and design principles in shaping new venture value propositions and business models
- Growth formulas of lean and transnational new ventures

Associate Professor, Sprott School of Business, Carleton University (July, 2017 - Present), Ottawa, Canada-Ontario.

- Associated with the Technology Innovation Management Program
- Research focusing developing actionable frameworks for the adoption of a design thinking approach to digital transformation, GenAI, large language models and text analytics tools for the development of business insights

Director, Technology Innovation Management (TIM) Program (2022 - 2023), Ottawa, Canada-Ontario.

- Supporting the Dean of the Sprott School of Business to develop and implement a strategy to build an interdisciplinary and globally focused Carleton School of Entrepreneurship
- Completing the proposal for a new Master of Digital Transformation & Entrepreneurship program
- Designing and establishing a new Centre for Cross-Border, Digital & Inclusive (CBDI) Entrepreneurship
- Strengthening the value creation capacity of the TIM program and the CBDI Entrepreneurship centre
- Implementing the ongoing changes in the delivery of the TIM program pathways

Editor-in-Chief, Technology Innovation Management Review (August, 2019 - 2021), Ottawa, Canada-Ontario.

Associate Professor, University of Southern Denmark (2014 - 2017), Odense, Denmark.

- Research on integrating lean startup approach, born global firms and technology entrepreneurship focusing on new venture formation and growth
- Leading the establishment of a new technology entrepreneurship profile of the Product Development and Innovation Program
- Supervising student projects focusing on technology entrepreneurship, launching new firms, technology innovation management and business model innovation
- Teaching courses on technology entrepreneurship and technology commercialization, business model innovation and technology innovation management
- Contributed to the resourcing of university business incubator

Adjunct Professor, Sofia University (2010 - 2017), Sofia, Bulgaria.

- Associated with the Technology Entrepreneurship program at the Department of Software Engineering
- Responsible for the design of the innovation management teaching stream
- Supervision of master thesis projects focusing on technology commercialization strategies & web search techniques for the development of business intelligence tools

Adjunct Research Professor, Dept. Systems and Computer Engineering, Carleton University (2010 - 2014), Ottawa, Canada-Ontario.

- Associated with the Technology Innovation Management Program
- Research focus on growth formulas of global technology startups and entrepreneurial approaches based on recombinant capabilities, bricolage and frugal innovation
- Enhancing the global reach of Lead-to-Win program & the VENUS Cybersecurity Institute

Associate Professor, University of Southern Denmark (2009 - 2014), Odense, Denmark.

- Research on the interface of marketing management and technology innovation
- Contributed to the establishment of the MSc Eng Product Development and Innovation program
- Teaching courses focusing on innovation management, technology marketing & commercialization

Assistant Professor, Dept of Systems and Computer Engineering, Carleton University (2006 - 2009), Ottawa, Canada-Ontario.

- Taught technology marketing, research methods & technological standards courses
- Initiated a research initiative focusing on value co-creation platforms

Adjunct Professor, Departement d'Informatique et d'ingénierie, Université du Québec en Outaouais (2006 - 2008), Gatineau, Canada-Quebec.

- Designing & teaching a simulation-based course on optical communication systems

Post-Doctoral Research Fellow, Université du Québec à Hull (1996 - 1997), Hull, Canada-Quebec.

- Design and modelling of optical waveguide structures

Assistant Professor of Physics, Technical University of Sofia (1995 - 1996), Sofia, Bulgaria.

- Teaching introductory physics courses; research on nonlinear phenomena in optical fibers

Assistant Professor of Physics, Higher Institute for Transport Engineering "Todor Kableshkov" (1991 - 1995), Sofia, Bulgaria.

- Teaching introductory physics courses, Ph.D. work in parallel with Assistant Professor duties

Physicist, Higher Institute for Transport Engineering "Todor Kableshkov" (1989 - 1991), Sofia, Bulgaria.

Other Employment

Program Manager – Photonics and Biophotonics Programs, Vitesse Re-Skilling™ Canada (2003 - 2009), Ottawa, Canada-Ontario.

- Designing and organizing international forums focusing on interdisciplinary knowledge sharing and identification of new science- & technology-based business opportunities
- Contributed to the emergence of the biophotonics sector in Canada

Innovation Development Officer, Technology Transfer and Business Enterprise Office, University of Ottawa (2006), Ottawa, Canada-Ontario.

- Working for the Ottawa-Gatineau University-College Innovation Alliance
- Initiated, designed and managed science & technology commercialization initiatives for the University of Ottawa, Carleton University & Université du Québec en Outaouais

Optical Link Design Engineer, Innovance Networks (2001 - 2002), Ottawa, Canada-Ontario.

- Simulation and design of optical agile communication systems

Director, Customer Support and Training, Optiwave Corporation (2000 - 2001), Ottawa, Canada-Ontario.

- Designed and trained a team of application engineers focusing on customer relationship management for technical support and product innovation

Research Engineer/Scientist, Optiwave Corporation (1997 - 2000), Ottawa, Canada-Ontario.

- Design and development of software simulation and design products

C. PROFESSIONAL HONOURS

2018: Best Paper Award, 8th International Conference of the Association of Global Management Studies. June 2018, Best Paper Award, "A topic modeling approach to categorizing the value propositions of cybersecurity startups using machine learning as a differentiator", by Haiwen Hou, Stoyan Tanev, Andrea Gorra and Tony Bailetti, Concordia University, Montreal, QC, Canada, June 21–22, 2018..

2010: Special award "The Future Innovation Policy in Denmark", Danish Council for Technology and Innovation. For the paper "The Challenges of New Innovation Paradigms for the Danish Research and Innovation Policies" (co-authored with T. Bisgaard, M. Knudsen & M. Thomsen).

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	7		8
Articles-in-Progress (All)		2		2
Publications in Conference Proceedings (Refereed)	1	10		11
Publications of Non-refereed or Invited Papers		1		1
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings	3	3		6
Paper Presentations (Refereed)		1		1
Grants - Funded (both refereed and non-refereed)		2		2
Other Research, Non-refereed		1		1
Totals	5	27		32

Refereed Scholarly Publications

Articles in Refereed Journals

di Tollo, G., Andria, J., Tanev, S., & Ghilardi, S. (2023). Integrating the gender dimension to disclose the degree of businesses' articulation of innovation. *Journal of Computational Social Science*. [B,Other]

DOI open access

Aweisi, A., Arora, D., Emby, R., Rehman, M., Tanev, G., Tanev, S. (2021). Using web text analytics to identify digital health company market offers. *Technology Innovation Management Review*, 11 (7/8), 65-78. [C]

Prabaharan, R., Bliemel, M., & Tanev, S. (2021). Value Proposition Misalignment and the Failure to Become a Born-Global Company. *Technology Innovation Management Review*, 11 (4), 38-51. [C]

Sieklicki, S., & Tanev, S. (2021). From Description to Action: Actor-Network Theory and Innovation Management. *International Journal of Innovation Management*, 2140006-1-18. [B]

Published with DOI

Liotta, G., Tanev, S., Gorra, A., & Pospieszala, A. (2020). Sustainability communication patterns on the websites of European top R&D spenders. *Technology Innovation Management Review*, 10 (10), 43-54. [C]

Bailetti, T., Tanev, S., & Keen, C. (2020). What Makes Value Propositions Distinct and Valuable to New Companies Committed to Scale Rapidly? *Technology Innovation Management Review*, 10 (6), 14-27. [C]

Bailetti, T., & Tanev, S. (2020). Examining the Relationship Between Value Propositions and Scaling Value for New Companies. *Technology Innovation Management Review*, 10 (2), 5-13. [C]

Lukosiute, K., Jensen, S., & Tanev, S. (2019). Is Joining a Business Incubator or Accelerator Always a Good Thing? *Technology Innovation Management Review*, 9 (7), 5-15. [C]

Droll, A., Khan, S., Ekhlal, E., & Tanev, S. (2017). Using Artificial Intelligence and Web Media Data to Evaluate the Growth Potential of Companies in Emerging Industry Sectors. *Technology Innovation Management Review*, 7 (6), 26-38. [C]

Coviello, N., & Tanev, S. (2017). Initiating a New Research Phase in the Field of International Entrepreneurship: An Interview with Professor Nicole Coviello. *Technology Innovation Management Review*, 7 (5), 52-56. [C]

Quality None

Tanev, S. (2017). Is There a Lean Future for Global Startups? *Technology Innovation Management Review*, 7 (5), 6-15. [C]

di Tollo, G., Tanev, S., & Liotta, G. (2015). Using online textual data, principal component analysis and artificial neural networks to study business and innovation practices in technology-driven firms. *Computers in Industry*, 74, 16-28. [B]

Rasmussen, E., & Tanev, S. (2015). The Emergence of the Lean Global Startup as a New Type of Firm. *Technology Innovation Management Review*, 5 (11). [C]

Quality None

Tanev, S., Liotta, G., & Kleismantas, A. (2015). A business intelligence approach using web search tools and online data reduction techniques to examine the value of product-enabled services. *Expert Systems with Applications*, 42 (21), 7582-7600. [B]

Tanev, S., Rasmussen, E., Zijdemans, E., Lemminger, R., & Limkilde, L. (2015). Lean and global technology startups: Linking the two research streams. *International Journal of Innovation Management*, 19 (3), 41. [B]

Zijdemans, E., & Tanev, S. (2014). Conceptualizing innovation in born global firms. *Technology Innovation Management Review*. [C]

Tanev, S., & Frederiksen, M. (2014). Generative innovation practices, customer creativity, and the adoption of new technology products. *Technology Innovation Management Review*. [C]

Frederiksen, M., & Tanev, S. (2014). Consumer Creativity as a Prerequisite for the Adoption of New Technological Products: Looking for Insights

- from Actor-Network Theory. *International Journal of Actor-Network Theory and Technological Innovation*, 6 (2), 45-69. [C]
- Special issue focusing on Human-Technology Interaction and Technology Adoption: Exploring Frameworks other than ANT
- Tanev, S. (2013). The concept of energy in T. F. Torrance and in orthodox theology. *Participatio - Journal of the Thomas F. Torrance Theological Fellowship*, 4, 190-212.
- Kylindri, S., Blanas, G., Tanev, S., & Henriksen, L. (2013). The impact of friendship ties on new product development student projects. *World Transactions on Engineering and Technology Education*, 11 (3), 242-248.
- Tanev, S. (2012). Global from the Start: The Characteristics of Born-Global Firms in the Technology Sector. *Technology Innovation Management Review*, 5-8. [C]
- Ma, Z., Lin, C., & Tanev, S. (2012). The NPD team conflict: insights from cultural diversity and geographical dispersion. *Innovative Marketing*, 8 (3), 62-72.
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Articles in Refereed Conference Proceedings

Full Paper

- Sieklicki, S., & Tanev, S. (2023). Actor-network theory and the transition from invention to innovation. *ISPIM Conference*.
- Sieklicki, S. & Tanev, S. (2023). Actor-network theory and the transition from invention to innovation. Paper presented at the XXXIV ISPIM Innovation Conference, held in Ljubljana, Slovenia on 04 June to 07 June 2023, and published in the Proceedings of the XXXIV ISPIM Innovation Conference, edited by Editors: Iain Bitran, Leandro Bitetti, Steffen Conn, Jessica Fishburn, Paavo Ritala, Marko Torkkeli and Jialei Yang. ISBN 978-2-65069-3-7.
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- Tanev, S., Bailetti, T., Keen, C., & Hudson, D. (2022). Can AI empower value propositions of new globally-driven companies? *ISPIM Connects*. 6-8 December, 2020.
- Sieklicki, S., & Tanev, S. (2021). From Description to Action: Actor Network Theory and Innovation Management. *ISPIM Innovation Conference*.
- Aweisi, A., Arora, D., Emby, R., Rehman, M., Tanev, G., Tanev, S. (2021). Using web text analytics to identify digital health company market offers. *ISPIM Innovation Conference*.
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Tanev, S., & Blackbright, H. (Ed.). (2021). *Artificial Intelligence and Innovation Management*.

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Chapters in Edited Books

Tanev, S., Bailetti, T., Keen, C., & Hudson, D. (2022). The Potential of AI to Enhance the Value Propositions of New Companies Committed to Scale Early and Rapidly. In Tanev, S. & Blackbright, H (Eds.), *Artificial Intelligence and Innovation Management* (pp. 185-213). World Scientific Publishing Europe. [Status: Published]

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Description: Ed. Series in Medical Physics & Biomed. Engineering

Other (Non-refereed) Scholarly Publications

Articles in non-Refereed journals

Applied or Integrative/application Scholarship

Tanev, S. (2021). Exploring Analogy of Debates to Approach the Encounter between Orthodox Theology and Quantum Physics. *Analogia - The Pemptousia Journal of Theological Studies*, 12-13, 97-136.

NO DOI

Basic or Discovery Scholarship

Tanev, S. (2024). Design Thinking for Competitive Intelligence in a Digital Business Transformation Context. *Journal of Intelligence Studies in Business*.

Other Scholarly Publications

2013: Tanev, S., *Electromagnetism and Optics, Encyclopedia of Sciences and Religions*. A. Runehov & L. Oviedo, Eds. Dordrecht: Springer Science and Business Media, 2013, pp. 697-705 (ISBN 978-1-4020-8264-1).

2013: Tanev, S., *Energy in Physics., Encyclopedia of Sciences and Religions*. A. Runehov & L. Oviedo, Eds. Springer Science and Business Media, 2013, pp. 731-740.

Other Publications

Other Publications

2021: Payne, A., From, P., & Tanev, S., *Interview: Discussing Value Proposition Research in the Context of New Companies Committed to Scaling Early and Rapidly*. Payne, A., Frow, P., & Tanev, S. 2021. Interview: Discussing Value Proposition Research in the Context of New Companies Committed to Scaling Early and Rapidly. *Technology Innovation Management Review*, 11(4): 6-12.

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Academic PRJ

2019 – 2022: *Technology Innovation Management Review*, Ottawa, Canada-Ontario (International).

Editor: Associate Editor

2013: *International Journal of Actor-Network Theory and Technological Innovation* (International).

Editor: Book / Textbook

2022: *Artificial Intelligence and Innovation Management* (International). S. Tanev & H. Blackburn, Eds. 2022. *Artificial Intelligence and Innovation Management* (Volume 38 of Series on technology management, ISSN 0219-9823), World Scientific Publishing Europe Limited, <https://doi.org/10.1142/q0334>; ISBN: 1800611323, 9781800611320: <https://www.worldscientific.com/worldscibooks/10.1142/q0334#t=aboutBook>

2017: *Orthodox Theology and the Sciences* (International). G. Dragas, P. Pavlov & S. Tanev, Editors, *Orthodox Theology and the Sciences*, Sofia, Bulgaria: Sofia University Press, & Columbia, MO, USA: New Rome Press, 2017.

2013: *Who Art Everywhere and Fillest All Things: Essence and Energy in Orthodox Theology and Physics*. (International). S. Tanev. Thou, Who Art Everywhere and Fillest All Things: Essence and Energy in Orthodox Theology and Physics. Sofia University Press, 2013 (in Bulgarian).

2013: Best of TIM Review on Value Co-creation, Ottawa, Canada-Ontario (International).

Editor: Guest Editor of Journal

2021: *Analogia – The Pemptousia Journal of Theological Studies*, (International). S. Tanev, 2021, Guest Editor, Special Issue on Science and Orthodox Theology, *Analogia – The Pemptousia Journal of Theological Studies*, Vol. 12-13.

Editor: Special Issue of a PRJ

2013: International Journal of Actor-Network Theory and Technological Innovation (International). Special issue: Human-Technology Interaction and Technology Adoption: Exploring Frameworks other than ANT,

2012: Technology Innovation Management Review (International). 2012 May Special Issue on Business Co-creation

Presentations

Papers Presented at Conferences

Refereed

Bailetti, T. & Tanev, S. (2022). *Applying a translational research approach to develop a business model framework*. ISPIM Innovation Conference, Copenhagen, Denmark.

Description: Bailetti, T. & Tanev, S. (2022). Applying a translational research approach to develop a business model framework.

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Ekhlās, E., Droll, A., Khan, Sh., & Tanev, S. (2017). *Evaluating company growth potential using AI and web media data*. ISPIM Innovation Forum: Fostering Innovation Ecosystems, Toronto, Canada-Ontario.

Description: 19-22 March, 2017

Pilgrim, C. & Tanev, S. (2017). *How do really university business incubators help early-stage startups?* International Conference for Entrepreneurship, Innovation & Regional Development, Thessaloniki, Greece.

Description: Aug. 31-Sept. 1, 2017

M., B., Tanev, S., Weiss, M., & Rasmussen, E. (2016). *Lost in the canvases: Managing uncertainty in lean global startups*. ISPIM Innovation Conference, Porto, Portugal.

Bailetti, A., Zijdemans, E., Tanev, S., & Rasmussen, E. (2015, September). *The challenges of being both lean and global: Research insights for science and technology entrepreneurs*. Management of High Technologies Commercialization and Regional Innovation Systems, Saratov, Russia.

Description: 2015 Saratov Fall Meeting session "Management of High Technologies Commercialization and Regional Innovation Systems XI

Tanev, S. & Rasmussen, E. (2014). *The lean and global startup*. New Research Themes in International Entrepreneurship Conference, Odense, Denmark.

Description: Department of Marketing & Management, University of Southern Denmark, Odense, DK; May 22-23, 2014.

Drefeld, J., Stoyanova, A., Nielsen, J., & Tanev, S. (2014). *Trust me, I am a Robot! Conceptualizing interpersonal trust in the interaction between human patients and medical technology*. MatchPoints Seminar on Trust, Aarhus, Denmark.

Description: Aarhus University, Denmark, 22-24 May 2014.

Ferreira, E., Tanev, S., & Bailetti, A. (2010). *An empirical study of open source hardware business models and market offers*. International Product Development Management Conference, Murcia, Spain.

Description: 17th International Product Development Management Conference "The innovation in crisis time", June 13-15, 2010, Murcia, Spain.

Other Presentations

Invited Lecture

2015: University of Florence, Florence, Italy. Generative personal innovation practices for entrepreneurship & business model innovation – a two day seminar with PhD students from the business incubator

2013: TIM Lecture Series, Ottawa, Canada-Ontario. Technology adoption by design: Insights for entrepreneurs, Nov. 7, 2013, Carleton University.

Presentation

2018: Transnational Entrepreneurship Bootcamp for Canadian Women Entrepreneurs, Ottawa, Canada-Ontario. October, 2018, Shaping opportunities and value chains, A training unit and workshop, Transnational Entrepreneurship Bootcamp for Canadian Women Entrepreneurs, Bayview Yards Innovation Center.

2018: Indian Women Entrepreneurship Bootcamp, Ottawa, Canada-Ontario. September, 2018, Shaping opportunities, A training unit and workshop, Bayview Yards Innovation Center

2016: Know How / Show How Design Workshop, Sofia, Bulgaria. Designing things as actor-networks: Semiotics in action

2016: PhD Summer School, University of Southern Denmark, Odense M, Denmark. Innovation and entrepreneurship as a conversational skill. PhD Summer School "Synergizing Entrepreneurship and Production in High Wage Economies", June 2016

2015: Skolkovo Institute of Science & Technology, Moscow, Russia. The challenges of being both lean and global: Research insights for science and technology entrepreneurs

2014: MatchPoints Seminar on Trust, Aarhus University, Aarhus, Denmark. Trust me, I am a Robot! Conceptualizing interpersonal trust in the interaction between human patients and medical technology, 22-24 May 2014.

2014: Creating value through design: Designing business models", Copenhagen Business School, Copenhagen, Denmark. Business model

discovery, innovation or reinvention.

2013: Le Sujet de l'Acteur - An Anthropological Outlook on Actor-Network Theory, Workshop. Actor network vs activity theory: Dealing with the asymmetry in human-technology inter-actions, June 5–6, 2013

2013: International Seeking Solutions Summit, Quebec City, Canada-Quebec. A la recherche de l'acteur perdu: Enabling customer creativity to enhance the adoption of technological products, - Methods and Policies Creating a Local Ecosystem for Technology Transfer, Collaboration, and Local Innovation, Nov. 5, 2013.

2011: TEK Momentum, Kolding, Denmark. Disruptive innovations: an option or a necessity?, Business co-creation workshop with representatives from the food industry organized by TEK Momentum, May 26, 2011, Hotel Kolding city, Kolding.

Contract or Other Research

Research Grants and Awards

Grants

2023 [Year 3 of 3]: Tanev, S. Insight Development Grant (\$22,361.00 Not Funded of a total grant amount of \$67,083.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2022 [Year 2 of 3]: Tanev, S. Insight Development Grant (\$22,361.00 Not Funded of a total grant amount of \$67,083.00), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 2 of 2]: Tanev, S. Insight Development Grant (\$29,510.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2021 [Year 1 of 3]: Tanev, S. Insight Development Grant (\$22,361.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2020 [Year 1 of 2]: Tanev, S. Insight Development Grant (\$29,510.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2020: Tanev, S. Accelerate (\$33,750.00), Principal Investigator, PRI-Mitacs. [Status: Funded]

2020: Tanev, S. Accelerate (\$11,250.00), Principal Investigator, Unicorn Labs. [Status: Funded]

2018: Tanev, S. Start-up Funds (\$15,000.00), Principal Investigator, Carleton University, Dean's Office - Arts & Social. [Status: Funded]

2018: Tanev, S. Start-up Funds (\$10,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

2018: Tanev, S. Other Grant, Grantee, Carleton University. [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Board Member: Advisory Board

2024: Ontario Intelligence Centre of Excellence (OICE).

Board Member: PRJ Editorial Review Board

2011: Technology Innovation Management Review.

Chair: Conference / Track / Program

2018: Photonics North Conference, Montreal, Canada-Quebec. Co-Chair of Photonics Technology Entrepreneurship and Commercialization Session

2011: International Conference in Information Photonics, Ottawa, Canada-Ontario. Chair, Photonics Innovation and Commercialization Session

2010: Photonics Design and Simulation Conference,, Niagara Falls, Canada-Ontario. Chair, Photonics Design and Simulation Conference, Photonics North 2010, June 1-3, 2010 (with Dr. Pavel Cheben, Optoelectronics Research Group, IMS-NRC, Ottawa, Canada)

Invited Lecture

2015: University of Florence, Florence, Italy. Generative personal innovation practices for entrepreneurship & business model innovation – a two day seminar with PhD students from the business incubator

2013: TIM Lecture Series, Ottawa, Canada-Ontario. Technology adoption by design: Insights for entrepreneurs, Nov. 7, 2013, Carleton University.

Member: Committee/Task Force

2010: European Roundtable for Entrepreneurship Education (EREE).

2010: EBRF Conference, Nokia, Finland. Member of the International Jury, First Global Academic Cup Project Competition, Sept. 15-17.

Other Professional Service Activities

2024: International Workshop on Quantum Technology Entrepreneurship. Organizer of an online event on Nov 12:

<https://sprott.carleton.ca/event/quantum-technology-entrepreneurshipunlock-the-secrets-of-emerging-quantum-technology-enabled-opportunities/>

2024: From Discovery to Market: Translational Research vs Tech Transfer - Unlock the Secrets to Research Commercialization Success!. Organizer of International Workshop "From Discovery to Market: Translational Research vs Tech Transfer - Unlock the Secrets to Research Commercialization Success!" Thursday, May 02, 2024: <https://events.carleton.ca/from-discovery-to-market-translational-research-vs-tech-transfer/>

2024: Digital Thinking for Digital Transformation (DT4DT). Organizer of the International Conference "Digital Thinking for Digital Transformation (DT4DT)", Tuesday, February 20, 2024: <https://payments.carleton.ca/sprott/dtfdt-conference/>

2016: PhD Summer School, University of Southern Denmark, Odense, Denmark. Organizer of the PhD Summer School "Synergizing Entrepreneurship and Production in High Wage Economies", June 6-10, 2016, Cortex Park.

2014: ISPIAM Americas Conference, Montreal, Canada-Quebec. Co-organizer of the Workshop "Managing Innovation in the Cyber Security Technology Sector: Tech Entrepreneurship and Research Opportunities", Oct. 5-8, 2014.

Scholarly Work in Progress

Papers Under Review

Lotta, G., Tanev, S., Gorra, A., & Pospieszala, A. (2019). "A method to identify sustainability communication patterns on the websites of European top R&D spenders," Initial submission to *Technological Forecasting and Social Change*.

Working Papers

Tanev, S., Gorra, A., Pospieszala, A., & Liotta, G. (2019). "Online communication patterns of sustainability issues by EU top R&D spenders," targeted for Decision Support Systems.

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2023/Winter	TIMG5303	Machine Learning for Technology Entrepreneurship Problem-Solving	0.5	46	Main	100%
2022/Fall	TIMG5005	Customer Value Creation in Technology Firms	0.5	64	Main	100%
2022/Summer	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	65	Main	100%
2022/Winter	TIMG5303	Machine Learning for Technology Entrepreneurship Problem-Solving	0.5	46	Main	100%
2022/Winter	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	0	Main	100%
2021/Fall	TIMG5005	Customer Value Creation in Technology Firms	0.5	52	Main	100%
2021/Summer	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	47	Main	100%
2021/Winter	TIMG5303	Machine Learning for Technology Entrepreneurship Problem-Solving	0.5	51	Main	100%
2020/Fall	TIMG5005	Customer Value Creation in Technology Firms	0.5	35	Main	100%
2020/Summer	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	39	Main	100%
2020/Winter	TIMG5005	Customer Value Creation in Technology Firms	0.5	69	Main	100%
2019/Fall	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	33	Main	100%
2019/Summer	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	25	Main	100%
2019/Winter	TIMG5005	Customer Value Creation in Technology Firms	0.5	58	Main	100%
2018/Fall	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	21	Main	100%
2018/Summer	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	23	Main	100%
2018/Winter	TIMG5005	Customer Value Creation in Technology Firms	0.5	38	Main	
2017/Fall	TIMG5103	Advanced Topics: Technology Innovation Management	0.5	12	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Professional Memberships

International Society for Professional Innovation Management (ISPIAM), Present

Skills

Languages

English, French, Russian & Bulgarian

Curriculum Vitae - Sprott School of Business

Yun (Dora) Wang, PhD
Assistant Professor - Term
Sprott School of Business (Marketing)
Telephone:
Email: dora.wang@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Carleton University.

B. EMPLOYMENT

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Refereed Scholarly Publications

Articles in Refereed Journals

Wang, Y., Yu, B., & Cheng, J. (2024). Effects of product online reviews on product returns: A review and classification of the literature. *International Transactions in Operational Research*. [B]

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Contract or Other Research

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Reviewer: Ad Hoc Reviewer for a Journal

2024: Asia Pacific Management Review.

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	MKTG5200	Marketing Strategy	0.5	16	Main	100%
2024/Winter	MKTG5200	Marketing Strategy	0.5	20	Main	100%
2024/Winter	BUSI2208	Introduction to Marketing	0.5	66	Main	100%
2024/Winter	BUSI2208	Introduction to Marketing	0.5	75	Main	100%
2023/Fall	BUSI3210	Personal Selling	0.5	56	Main	100%
2023/Fall	BUSI2208	Introduction to Marketing	0.5	76	Main	100%
2019/Winter	BUSI2204	Basic Marketing	0.5	182	Main	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Selected Media Appearances: Online

Credentials

Curriculum Vitae - Sprott School of Business

Mika Westerlund, PhD
Associate Professor - Tenured, 2015
Sprott School of Business (Entrepreneurship)
Telephone: 613-520-2600 x1679
Email: mika.westerlund@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-0469-0438>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Helsinki School of Economics.

Title: *Doctor of Science in Economics and Business Administration (D.Sc.Econ) Helsinki School of Economics (accredited by AACSB since 2007, AMBA, and EQUIS); currently: Aalto University School of Business*

Doctor of Science. Aalto University, School of Science.

Master of Science. Aalto University School of Business.

Title: *Master of Science in Economics and Business Administration (M.Sc.Econ) Previously known as Helsinki School of Economics.*

B. EMPLOYMENT

Academic Appointments

Associate Professor, Technology Innovation Management (TIM), Sprott School of Business, Carleton University (2015 - Present), Ottawa, Canada-Ontario.

Assistant Professor, Technology Innovation Management (TIM), Sprott School of Business, Carleton University (2012 - 2015), Ottawa, Canada-Ontario.

Postdoctoral Scholar, Haas School of Business, University of California Berkeley (2011 - 2012), Berkley, California. Haas School of Business, University of California Berkeley, USA; accredited by AACSB; ranked #8 of world universities by the Times Higher Education 2014. Faculty sponsor: Prof. Henry Chesbrough, Institute for Business Innovation.

Postdoctoral Scholar, Department of Marketing, Aalto University School of Economics (2010 - 2012), N/A, Finland. Note: known as Helsinki School of Economics until 2009.

Visiting Scholar, London Business School, United Kingdom (2010 - 2011), London, United Kingdom. Accredited by AACSB, AMBA, EQUIS; ranked #3 of European business schools by Financial Times 2013. Faculty sponsor: Prof. Rajesh Chandy, Marketing; Chair in Entrepreneurship.

Other Employment

Researcher, Department of Marketing and Management, Helsinki School of Economics (2007 - 2009), N/A, Finland.

Research Fellow, Finnish Graduate School of Marketing, Department of Marketing and Management, Helsinki School of Economics (2005 - 2006), N/A, Finland.

Entrepreneur and Partner, Chairman of the Board, Datarom Districom Oy, Helsinki, Finland (1996 - 2006), Helsinki, Finland. B2B systems integration for intelligent building solutions, point-of-sales systems; computer hardware and software.

Researcher, Department of Marketing and Management, Helsinki School of Economics (2004), N/A, Finland.

Researcher, Institute for Marketing and International Business, LTT Research Ltd. (2003), N/A, Unknown. Research firm owned by Helsinki School of Economics.

Assistant, Department of Marketing and Management, Helsinki School of Economics (2002 - 2003), N/A, Finland.

Research Assistant, Department of Marketing and Management, Helsinki School of Economics (2001), N/A, Finland.

Product assistant (Channel sales and marketing), BasWare Oy (2000), Vantaa, Finland. E-invoicing software

Trainee (Consular duties and IT support), The Finnish Embassy in Japan (1999), Tokyo, Japan.

Trainee (IT system design and support), The Finnish Institute in Japan (1998 - 1999), Tokyo, Japan.

Various Positions, Various Technology Companies (1989 - 1999), N/A, Finland. Part-time jobs at various technology companies in Finland; customer service, marketing and sales (Ekström Power Oy: parts for motorcycles, outboard motors, and small engines; Electronor Oy: digital measuring instruments and sensor technology for manufacturing industries, Paragon Oy: printing works).

C. PROFESSIONAL HONOURS

2021: Carol-Ann Tetrault Sirsly Award, Sprott School of Business, Carleton University.

2020: Best Paper award, Biennial Conference of the Africa Academy of Management.

2020: Best Paper Award, Biennial Conference of the Africa Academy of Management. Isabelle, D., Westerlund, M., & Sajuyigbe, V. (2020). Legitimacy and distinctiveness of Nigerian-Canadian transnational firms. Biennial Conference of the Africa Academy of Management, Lagos, Nigeria, January 8-11..

2019: Best Paper Award, ISPIIM Connects. Westerlund, M., Rajala, R., Isabelle, D., Leminen, S., Basbair, R., & Korhonen, (2019). H. A multifactor model for digital innovation in allergy-free food retailing. ISPIIM Connects Ottawa 2019 Conference, Ottawa, Canada, April 7-10. (BEST PAPER NOMINATION/Dick Marsh Award).

2015: Best Paper Award, ISPIIM Conference. Practical Implications Award by NOKIA. .

2015: Best Reviewer Award, AIB Annual Meeting.

2012: Best Paper Award, NCSB Small Business Conference.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	5	20		25
Articles-in-Progress (All)		4		4
Publications in Conference Proceedings (Refereed)	2	15		17
Books, Monographs, Compilations, Manuals, Supplements, Chapters, Cases, Readings	1	4		5
Paper Presentations (Refereed)		1		1
Grants - Funded (both refereed and non-refereed)		2		2
Totals	8	46		54

Refereed Scholarly Publications

Articles in Refereed Journals

- Leminen, S., Rajahonka, M., & Westerlund, M. (2023). Innovation in living labs: A quantum approach. *Journal of Innovation Management*, 11 (4). [C]
- Isabelle, D., & Westerlund, M. (2023). A topic modelling based bibliometric exploration of international business research. *International Journal of Bibliometrics in Business and Management*. [C,Other]
- Isabelle, D., Westerlund, M., & Sajuyigbe, V. (2022). Building legitimacy and distinctiveness on Nigerian-Canadian transnational firms' websites. *Africa Journal of Management*, 8 (4), 505-526. [B]
- Isabelle, D., Han, Y., & Westerlund, M. (2022). A machine-learning analysis on the impacts of the COVID-19 pandemic on small business owners and implications from Canadian government policy response. *Canadian Public Policy*, 48 (2), 322-342. [B]
- Leminen, S., Rajahonka, M., Wendelin, R., Westerlund, M., & Nyström, A. (2022). Autonomous vehicle solutions and their digital servitization business models. *Technological Forecasting and Social Change*, 185, 122070. [A]
- Isabelle, D., & Westerlund, M. (2022). A review and categorization of Artificial Intelligence-based opportunities in wildlife, ocean and land conservation. *Sustainability*, 14 (4). [C,Other]
- Leminen, S., Rajahonka, M., Westerlund, M., & Hossain, M. (2021). Collaborative Innovation for Sustainability in Nordic Cities. *Journal of Cleaner Production*, 328, 129549. [A,Other]
- Yang, J., Hurmelinna-Laukkanen, P., Sharma, A., & Westerlund, M. (2021). Value appropriation and innovation collaboration dynamics: A review and research agenda. *International Journal of Innovation Management*, 25 (10), 2140007. [B]
- Greve, K., De Vita, R., Leminen, S., & Westerlund, M. (2021). Living Labs: From Niche to Mainstream Innovation Management. *Sustainability*, 13 (2), 791. [C,Other]
- Westerlund, M., Nene, S., Leminen, S., & Rajahonka, M. (2021). An exploration of blockchain-based traceability in food supply chains: On the benefits of distributed digital records from farm to fork. *Technology Innovation Management Review*, 11 (6), 32-44. [C]
- Westerlund, M., Isabelle, D., & Leminen, S. (2021). The acceptance of digital surveillance in an age of Big Data. *Technology Innovation Management Review*, 11 (3), 33-45. [C]
- Westerlund, M., Singh, I., Rajahonka, M., & Leminen, S. (2021). Technology Project Summaries as a Predictor of Crowdfunding Success. *Technology Innovation Management Review*, 11 (11-12), 33-44. [C]
- Isabelle, D., Westerlund, M., Mane, M., & Leminen, S. (2020). The Role of Analytics in Data- Driven Business Models of Multi-Sided Platforms: An exploration in the food industry. *Technology Innovation Management Review*, 10 (7). [C]
- Leminen, S., Nyström, S., & Westerlund, M. (2020). Change processes in living lab-based open innovation networks. *Industrial Marketing Management*, 91. [A+]

In press, Available online 23 January 2019 Published November 2020

Leminen, S., Rajahonka, M., Wendelin, R., & Westerlund, M. (2020). Industrial internet of things business models in the machine-to-machine context. *Industrial Marketing Management*, 84, 298-311. [A+]

For 2020

Greve, K., Leminen, S., De Vita, R., & Westerlund, M. (2020). Unveiling the diversity of scholarly debate on living labs: A bibliometric approach. *International Journal of Innovation Management*, 24 (08), 204003. [B]

Published with 2020 date after 2020 submission deadline

Westerlund, M. (2020). Social Acceptance of Wind Energy in Urban Landscapes. *Technology Innovation Management Review*, 10 (9), 49-62. [C]

Westerlund, M. (2020). Citizen Perceptions of Government's Resistance to Shared Parking. *Technology Innovation Management Review*, 10 (5), 28-40. [C]

Westerlund, M. (2020). Digitalization, Internationalization and Scaling of Online SMEs. *Technology Innovation Management Review*, 10 (4), 48-57. [C]

Westerlund, M. (2020). The Ethical Dimensions of Public Opinion on Smart Robots. *Technology Innovation Management Review*, 10 (2), 25-36. [C]

Westerlund, M. (2020). An Ethical Framework for Smart Robots. *Technology Innovation Management Review*, 10 (1), 35-44. [C]

Westerlund, M. (2019). The Emergence of Deepfake Technology: A Review. *Technology Innovation Management Review*, 9 (11), 39-52. [C]

Open Access

Isabelle, D., Westerlund, M., Rajala, M., & Leminen, S. (2019). Understanding the aspirations of Finnish entrepreneurs and venture capitalists: their effects on international operations and growth. *International Journal of Entrepreneurship and Small Business*, 37 (2), 190-213. [B]

Leminen, S., & Westerlund, M. (2019). Living Labs: From Scattered Initiatives to a Global Movement. *Creativity and Innovation Management*, 28 (2), 250-264. [B]

Hossain, M., Leminen, S., & Westerlund, M. (2019). A Systematic Review of Living Lab Literature. *Journal of Cleaner Production*, 213, 976-988. [A,Other]

Westerlund, M., Leminen, S., & Habib, C. (2018). Key Constructs and a Definition of Living Labs as Innovation Platforms. *Technology Innovation Management Review*, 8 (12), 51-62. [C]

Open Access Journal

Pacauskas, D., Rajala, R., Westerlund, M., & Mäntymäki, M. (2018). Harnessing user innovation for social media marketing: Case study of a crowdsourced hamburger. *International Journal of Information Management*, 43, 319-327. [A+]

Open Access

Westerlund, M., & Leminen, S. (2018). Does entrepreneurial marketing underrate competition? *Technology Innovation Management Review*, 8 (9), 16-27. [C]

Open access journal

Westerlund, M., Leminen, S., & Rajahonka, M. (2018). Topic Modelling Analysis of Living Labs Research. *Technology Innovation Management Review*, 8 (7), 40-51. [C]

Rajala, R., Mattila, J., Seppälä, T., Hakanen, E., & Westerlund, M. (2018). How do intelligent goods shape closed-loop systems? *California Management Review*, 60 (3), 20-44. [A]

Leminen, S., Rajahonka, M., Westerlund, M., & Wendelin, R. (2018). The Future of the Internet of Things: Towards Heterarchical Ecosystems and Service Business Models. *Journal of Business and Industrial Marketing*, 33 (6), 749-767. [A]

Leminen, S., Rajahonka, M., & Westerlund, M. (2017). Actors in the emerging Internet of Things ecosystems. *International Journal of E-Services and Mobile Applications*, 9 (1), 57-75.

Featured Article in March 2017 issue of the Informed Librarian Online (www.informedlibrarian.com)

Leminen, S., Rajahonka, M., & Westerlund, M. (2017). Towards Third-Generation Living Lab Networks in Cities. *Technology Innovation Management Review*, 7 (11), 21-35. [C]

Leminen, S., & Westerlund, M. (2017). Categorization of Innovation Tools in Living Labs. *Technology Innovation Management Review*, 7 (1), 15-25. [C]

Westerlund, M., Rajala, R., Leminen, S., & Isabelle, D. (2017). Do relationships facilitate growth in small technology firms? *International Journal of Technoentrepreneurship*, 3 (3), 228-243.

Leminen, S., Westerlund, M., & Rajahonka, M. (2017). Innovating with service robots in health and welfare living labs. *International Journal of Innovation Management*, 21 (8), 1-24. [B]

Isabelle, D., Westerlund, M., Rajala, R., & Leminen, S. (2017). Networks, Business Models and Competitiveness in Small Finnish Firms. *International Journal of Business and Globalisation*, 18 (1), 9-26.

Westerlund, M., Isabelle, D., Rajala, R., & Leminen, S. (2016). Funders and founders: Partners in good times and in bad? *International Journal of Globalisation and Small Business*, 8 (3), 269-288. [C]

Leminen, S., Nyström, A., Westerlund, M., & Kortelainen, M. (2016). The Effect of Network Structure on Radical Innovation in Living Labs. *Journal of Business and Industrial Marketing*, 31 (6), 743-757. [A]

2015 ISI: 0.973

- Rajala, R., Westerlund, M., & Lampikoski, T. (2016). Environmental sustainability in industrial manufacturing: Re-examining the greening of Interface's business model. *Journal of Cleaner Production*, 115, 52-61. [A,Other]
2015 ISI: 4.959
- Leminen, S., & Westerlund, M. (2016). A framework for understanding the different research avenues of living labs. *International Journal of Technology Marketing*, 11 (4), 399-420. [C]
- Kavandi, H., & Westerlund, M. (2015). Using Entrepreneurial Marketing to Foster Reseller Adoption of Smart Micro-Grid Technology. *Technology Innovation Management Review*, 5 (9), 5-16. [C]
- Leminen, S., Turunen, T., & Westerlund, M. (2015). The gray areas between open and closed innovation networks. *Technology Innovation Management Review*, 5 (12), 6-18. [C]
- Tukainen, T., Leminen, S., & Westerlund, M. (2015). Cities as collaborative innovation platforms. *Technology Innovation Management Review*, 5 (10), 16-23. [C]
- Leminen, S., Nyström, A., & Westerlund, M. (2015). A Typology of Creative Consumers in Living Labs. *Journal of Engineering and Technology Management*, 37, 6-20. [B]
2014 ISI: 2.060
- Leminen, S., Nyström, A., & Westerlund, M. (2014). On Becoming Creative Consumers – User Roles in Living Labs Networks. *International Journal of Technology Marketing*, 9 (1), 33-52. [C]
2013 ABDC: C
- Lampikoski, T., Westerlund, M., Rajala, R., & Möller, K. (2014). Green Innovation Games: Value-Creation Strategies for Corporate Sustainability. *California Management Review*, 57 (1), 88-116. [A]
FT-45, 2013 ABDC: A, 2013 ISI: 1.944
- Nyström, A., Leminen, S., Westerlund, M., & Kortelainen, M. (2014). Actor Roles and Role Patterns Influencing Innovation in Living Labs. *Industrial Marketing Management*, 43 (3), 483-495. [A+]
2013 ISI: 1.897
- Westerlund, M., Leminen, S., & Rajahonka, M. (2014). Designing Business Models for the Internet of Things. *Technology Innovation Management Review*, 4 (7), 5-14. [C]
- Westerlund, M., & Rajala, R. (2014). Effective Digital Channel Marketing for Cybersecurity Solutions. *Technology Innovation Management Review*, 4 (10), 22-32. [C]
- Rajala, R., Westerlund, M., Vuori, M., & Hares, J. (2013). From Idea Crowdsourcing to Managing User Knowledge. *Technology Innovation Management Review*, 23-31. [C]
- Veekman, C., Schuurman, D., Leminen, S., & Westerlund, M. (2013). Linking Living Lab Characteristics and Their Outcomes: Towards a Conceptual Framework. *Technology Innovation Management Review*, 6-15. [C]
- Rajala, A., Westerlund, M., Murtonen, M., & Starck, K. (2013). Servitization in a Security Business: Changing the Logic of Value Creation. *Technology Innovation Management Review*, 65-72. [C]
- Suomala, J., Palokangas, L., Leminen, S., Westerlund, M., Heinonen, J., J. Numminen (2012). Neuromarketing: Understanding Customer's Subconscious Responses to Marketing. *Technology Innovation Management Review*, 12-21. [C]
- Niitamo, V., Westerlund, M., & Leminen, S. (2012). A Small-Firm Perspective on the Benefits of Living Labs. *Technology Innovation Management Review*, 44-49. [C]
- Leminen, S., & Westerlund, M. (2012). Living Labs as Open-Innovation Networks. *Technology Innovation Management Review*, 6-11. [C]
- Baillet, A., Bot, S., Duxbury, T., Hudson, D., McPhee, C., Steven M. Muegge, M. Weiss, J. Wells, M. Westerlund (2012). An Overview of Four Issues on Technology Entrepreneurship in the TIM Review. *Technology Innovation Management Review*, 2 (6), 28-34. [C]
- Leminen, S., & Westerlund, M. (2012). Categorizing the Growth Strategies of Small Firms. *Technology Innovation Management Review*, 5-9. [C]
- Rajala, R., Westerlund, M., & Möller, K. (2012). Strategic Flexibility in Open Innovation - Designing Business Models for Open Source Software. *European Journal of Marketing*, 46 (10), 1368-1388. [A+]
2013 ISI: 1.000
- Leminen, S., & Westerlund, M. (2012). Towards Innovation in Living Labs Networks. *International Journal of Product Development*, 17 (1/2), 43-59.
2013 ABDC: C
- Westerlund, M., & Leminen, S. (2011). Managing the Challenges of Becoming an Open Innovation Company: Experiences from Living Labs. *Technology Innovation Management Review*, 19-25. [C]
- Westerlund, M., Rajala, R., & Rajala, A. (2011). Security Service Adoption in B2B Context: Do Clients and Providers Hold Congruent Views? *European Journal of Management*, 11 (3), 42-51.
- Westerlund, M., & Rajala, R. (2010). Learning and Innovation in Inter-organizational Network Collaboration. *Journal of Business and Industrial Marketing*, 25 (6), 435-442. [A]

Full Paper

- Leminen, S., Rajahonka, M., & Westerlund, M. (2022). Quantum computing principles for innovation in living labs. *ISPIM Innovation Conference*.
- Leminen, S., Greve, K., Rajahonka, M., & Westerlund, M. (2021). Inside the black box: Innovation dynamics in urban living labs. *ISPIM Innovation Conference*.
- Yang, J., Hurmelinna-Laukkanen, P., Sharma, A., & Westerlund, M. (2021). Reviewing dynamics of value appropriation and innovation collaboration. *ISPIM Innovation Conference*.
- Isabelle, D., Westerlund, M., & Sajuyigbe, V. (2020). Legitimacy and distinctiveness of Nigerian-Canadian transnational firms. *Biennial Conference of the Africa Academy of Management*.
Best Paper Award Winner, Entrepreneurship & Small Business
- Westerlund, M. (2020). Mapping the Living Lab Debate: Origins and Future Research Directions. *ISPIM Innovation Conference*.
- Sharma, A., & Westerlund, M. (2020). Topic modeling of the literature on patent evaluation. *ISPIM Connects Global*.
- Isabelle, D., Westerlund, M., & Leminen, S. (2020). A machine-learning video analysis of videos on entrepreneurial fear of failure. *ISPIM Connects Global*.
- Westerlund, M., Isabelle, D., & Leminen, S. (2020). Citizen acceptance of mass surveillance? Identity, intelligence and biodata concerns. *ISPIM Connects Global*.
Osaka, Japan (Virtual). Dec. 7-8, 2020
- Westerlund, M., Rajala, R., Isabelle, D., Leminen, S., Basbair, R., Korhonen (2019). A multifactor model for digital innovation in allergy-free food retailing. *ISPIM Connects*.
ISPIM Connects Ottawa 2019 Conference, Ottawa, Canada, April 7-10. (BEST PAPER NOMINATION/Dick Marsh Award)
- Isabelle, D., & Westerlund, M. (2019). A Topic Modelling Analysis of Research in International Business Conferences. *Vaasa Conference on International Business*.
Vaasa, Finland, August 19-21
- Leminen, S., Rajahonka, M., & Westerlund, M. (2019). Innovation Mechanism(s) in Third-Generation Living Labs: Towards Unification of Collaborative Innovation Networks. *ISPIM Innovation Conference*.
Florence, Italy, June 16-19.
- Mohalik, S., Westerlund, M., Rajala, R., & Timonen, H. (2019). Increasing the adoption of teleworking in the public sector. *ISPIM Connects*.
ISPIM Connects Ottawa 2019, Conference, Ottawa, Canada, April 7-10.
- Westerlund, M., Isabelle, D., & Ebonka, E. (2019). Identifying user priorities for service innovation in the public sector. *ISPIM Connects*.
ISPIM Connects Ottawa 2019 Conference, Ottawa, Canada, April 7-10
- Nene, S., Westerlund, M., Leminen, S., & Rajahonka, M. (2019). Benefits of Blockchain-based Traceability in Food Supply Chains. *ISPIM Connects*.
ISPIM Connects Ottawa 2019 Conference, Ottawa, Canada, April 7-10
- Westerlund, M., Mahmood, Z., Leminen, S., & Rajahonka, M. (2019). Topic modelling analysis of online reviews: Indian restaurants at Amazon.com. *ISPIM Connects*.
ISPIM Connects Ottawa 2019 Conference, Ottawa, Canada, April 7-10
- Westerlund, M., Singh, I., Rajahonka, M., & Leminen, S. (2019). Can short-text project summaries predict funding success on crowdfunding platforms? *ISPIM Connects*.
ISPIM Connects Ottawa 2019 Conference, Ottawa, Canada, April 7-10
- Westerlund, M., Olaneye, O., Rajahonka, M., & Leminen, S. (2019). Topic modelling on e-petition data to understand service innovation resistance. *ISPIM Connects*.
- Leminen, S., Rajahonka, M., & Westerlund, M. (2018). Third-Generation Living Labs: Towards Incarnation of Collaborative Innovation Networks. *ISPIM Innovation Conference*.
Stockholm, Sweden, June 17-20.
- Isabelle, D., & Westerlund, M. (2018). Data-driven business models in the food business. *International Society for Professional Innovation and Management (ISPIM) Connects*.
Fukuoka, Japan, December 2-5, 2018
- Leminen, S., Niitamo, V.-P., & Westerlund, M. (2017). A Brief History of Living Labs: From Scattered Initiatives to Global Movement. *Open Living Lab Days Conference*.
Krakow, Poland, August 28-September 1
- Leminen, S., Westerlund, M., & Rajahonka, M. (2017). Innovating with service robots in living labs. *ISPIM Innovation Forum*.
BEST PAPER AWARD/Technological Implications Award, BEST PAPER NOMINATION/Knut Hold Award
- Westerlund, M., Muegge, S., Bailetti, A., & Weiss, M. (2017). Motivation for continued contribution to an open access innovation journal. *ISPIM Innovation Symposium*.
March 19-22, Toronto, Canada.

- Isabelle, D., Westerlund, M., Leminen, S., & Rajala, R. (2017). Public venture capital and entrepreneurial cognizance: Effects on the performance of small international companies. *Academy of International Business (AIB) Annual Meeting*.
July 2-5 - Dubai, UAE
- Westerlund, M., Bailetti, T., Muegge, S., & Weiss, M. (2017). Towards smart cities: Residential interest in community platforms. *ISPIM Innovation Forum*.
March 19-22, Toronto, Canada
- Leminen, S., & Westerlund, M. (2016). Innovation Tools in Living Labs. *International Society for Professional Innovation Management (ISPIM) Innovation Conference*.
Porto, Portugal, June 19-22
- Isabelle, D., & Westerlund, M. (2016). Business Incubation and Business Model Innovation. *International Conference on Innovation and Entrepreneurship*.
4th International Conference in Toronto, Canada, April 28-29
- Habib, C., Westerlund, M., & Leminen, S. (2015). Living labs as innovation platforms: The key constructs. *OpenLivingLab Days Conference*.
August 25, 2015. Istanbul, Turkey.
- Westerlund, M., Rajala, R., Leminen, S., & Isabelle, D. (2015). Networked Business Models for Small Firm's International Expansion. *International Conference on Globalization and Changing Landscape of Business*.
June 30 - July 1, 2015. Bangalore, India.
- Leminen, S., Rajahonka, M., & Westerlund, M. (2015). Modular and complementary structures and systems in IoT business models. *International Seminar on Service Modularity*.
January 15-16, 2015. Helsinki, Finland.
- Leminen, S., DeFillippi, R., & Westerlund, M. (2015). Paradoxical Tensions in Living Labs. *International Society for Professional Innovation Management (ISPIM) Innovation Conference*.
Best Paper Award. June 14-17, 2015. Budapest, Hungary.
- Muita, K., Westerlund, M., & Rajala, R. (2015). The Evolution of Rapid Production: How to Adopt Novel Manufacturing Technology. *Information Control in Manufacturing (INCOM) Conference*.
May 11-13, 2015. Ottawa, Ontario, Canada.
- Westerlund, M., Rajala, R., Kavandi, H., Rajahonka, M., & Leminen, S. (2015). Supply chain reactions to the rise of the Internet of Things: Reseller adoption of microgrid solutions. *International Conference on Electronic Business (ICEB)*.
December 6-10, 2015. Hong Kong.
- Leminen, S., Rajahonka, M., & Westerlund, M. (2015). Actor roles in the Internet of Things ecosystems. *International RESER (The European Association for REsearch on SERVICES) Conference*.
September 10-12, 2015. Copenhagen, Denmark.
- Leminen, S., Westerlund, M., & DeFillippi, R. (2014). Tensions, Paradoxes and Challenges in Living Labs. *European Group for Organizational Studies (EGOS) Colloquium*.
July 3-5, 2014. Rotterdam, The Netherlands.
- Bailetti, T., Weiss, M., Muegge, S., & Westerlund, M. (2014). Lead to Win - An ecosystem approach to making universities more entrepreneurial. *University-Industry Interaction (UIIN) Conference*.
April 23-25, 2014. Barcelona, Spain.
- Westerlund, M., & Leminen, S. (2014). The multiplicity of research on innovation through living labs. *International Society for Professional Innovation Management (ISPIM) Innovation Conference*.
June 8-11, 2014. Dublin, Ireland.
- Leminen, S., Nousiainen, A., & Westerlund, M. (2014). Value co-creation and digital services in the book publishing industry. *International RESER (The European Association for REsearch on SERVICES) Conference*.
September 11-13, 2014. Helsinki, Finland.
- Leminen, S., Rajahonka, M., Westerlund, M., & Siruianinen, R. (2014). Ecosystem Business Models for the Internet of Things. *International RESER (The European Association for REsearch on SERVICES) Conference*.
September 11-13, 2014. Helsinki, Finland.
- Westerlund, M., & Rajala, R. (2014). The Promises and Perils of Crowdsourcing in Service Innovation. *International Society for Professional Innovation Management (ISPIM) Innovation Conference*.
October 5-8, 2014. Montreal, Quebec, Canada.
- Leminen, S., & Westerlund, M. (2013). Open Innovation Paradoxes in Living Labs Networks. *European Academy of Management (EURAM) Conference*.
June 26-29, 2013. Istanbul, Turkey.
- Rajala, R., Toivonen, M., Bragge, J., & Westerlund, M. (2013). Crowdsourcing as a method to innovate in the S-DL framework. *International RESER (The European Association for REsearch on SERVICES) Conference*.

September 19-21, 2013. Aix en Provence, France.

Leminen, S., Turunen, T., & Westerlund, M. (2013). Innovating Services in Networks: Interplay between Openness and Closeness. *Cambridge Academic Design Management Conference (CADMC)*.

September 4-5, 2013. Cambridge, UK.

Veeckman, C., Schuurman, D., Leminen, S., Lievens, B., & Westerlund, M. (2013). Characteristics and Their Outcomes in Living Labs: A Flemish-Finnish Case Study. *International Society for Professional Innovation Management (ISPIM) Innovation Conference*.

June 16-19, 2013. Helsinki, Finland.

Westerlund, M., Rajala, R., & Hares, J. (2013). Managing user innovation through crowdsourcing in online user communities. *International Society for Professional Innovation Management (ISPIM) Innovation Conference*.

June 16-19, 2013. Helsinki, Finland.

Lampikoski, T., Westerlund, M., & Rajala, R. (2013). Managing corporate business model greening in the manufacturing industry. *Corporate Sustainability and Eco-innovations Conference (CSEI)*.

November 18-19, 2013. Warsaw, Poland.

Westerlund, M., & Leminen, S. (2012). In praise of entrepreneurial marketing: a study on entrepreneur-led firms. *Nordic Conference on Small Business Research (NCSB)*.

May 23-25, 2012. Helsinki, Finland. BEST PAPER AWARD.

Leminen, S., Westerlund, M., & Kortelainen, M. (2012). A Recipe for Innovation through Living Lab Networks. *International Society for Professional Innovation Management (ISPIM) Innovation Conference*.

June 17-20, 2012. Barcelona, Spain.

Nyström, A., Leminen, S., Westerlund, M., & Kortelainen, M. (2012). Rolemaking and role-taking in living lab networks – organizing for co-creation of innovation. *Innovation in Business Networks (IBeN) Seminar*.

March 22-23, 2012. Kolding, Denmark.

Rajala, R., & Westerlund, M. (2012). The effects of service orientation, technology orientation and open innovation on the performance of software-intensive service businesses. *Hawaii International Conference on System Sciences (HICSS)*.

January 4-7, 2012. Maui, Hawaii, USA. BEST PAPER NOMINATION.

Leminen, S., Westerlund, M., Rajahonka, M., & Siuruainen, R. (2012). Towards IOT ecosystems and business models. *Conference on Internet of Things and Smart Spaces (ruSMART)*.

August 27-28, 2012. St. Petersburg, Russia.

Westerlund, M., & Rajala, R. (2011). Reseller-perceived Value of Digital Channel Marketing in IT Security Business. *Economics, Finance and International Business Research Conference (EFIBR)*.

December 8-11, 2011. Miami, USA.

Leminen, S., & Westerlund, M. (2011). On becoming a user-driven firm: slowcooked for extra goodness? *World Conference on Mass Customization, Personalization, and Co-Creation (MCPC)*.

November 17-19, 2011. San Francisco, California, USA.

Westerlund, M., Rajala, R., & Rajala, A. (2011). Benefits of Security Service Adoption for B2B Clients. *International Academy of Management and Business (IAMB) Conference*.

November 7-9, 2011. San Francisco, California, USA.

Westerlund, M., Rajala, R., & Rajala, A. (2011). Security Service Adoption in B2B Context: Do Clients and Providers Hold Congruent Views? *International Academy of Business and Economics (IABE)*.

October 16-18, 2011. Las Vegas, Nevada, USA.

Leminen, S., & Westerlund, M. (2011). Innovation co-creation with customer and user networks. *Industrial Marketing and Purchasing (IMP) Conference*.

August 30 - September 3, 2011. Glasgow, UK.

Korhonen, H., Peltola, S., Rynänen, T., & Westerlund, M. (2010). Determinants to Service Innovation Success: an Organizational Orientation Perspective. *Contemporary Views on Business Conference (COMBI)*.

October 7-10, 2010. Vantaa, Finland.

Hammarén, R., Kangas, A., Multanen, A., Murtonen, M., Rajala, A., Rajala, R., Westerlund, M. (2010). Insights into the Development of the Security Business: Towards Increasing Service Orientation. *Annual Conference of the Finland Futures Research Centre and the Finland Futures Academy*.

Theme: Security in Futures -Security in Change. June 3-4, 2010. Turku, Finland.

Rajala, R., & Westerlund, M. (2010). Antecedents to Consumers' Acceptance of Mobile Advertisements – A Hierarchical Construct PLS Structural Equation Model. *Hawaii International Conference on System Sciences (HICSS)*.

January 5-8, 2010. Kauai, Hawaii.

Edited Books

Westerlund, M., & Leminen, S. (Ed.). (2015). *Living Labs - Best of TIM Review Talent First Network*.

Description: eBook Kindle Edition.

Chapters in Edited Books

- Westerlund, M., & Aman, M. (2022). Social Media Video Analysis for Entrepreneurial Opportunity Discovery in Artificial Intelligence. In Taney, S., & Blackburn, H. (Eds.), *Artificial Intelligence and Innovation Management* (pp. 75-95). World Scientific Publishing Europe Limited. [Status: Published]
- Leminen, S., Rajahonka, M., & Westerlund, M. (2020). Actors in the Emerging Internet of Things Ecosystems. *Disruptive Technology: Concepts, Methodologies, Tools, and Applications* (pp. 265-285). Information Resources Management Association. [Status: Published]
Description: International Journal of E-Services and Mobile Applications (2017) article republished as a book chapter
- Leminen, S., Rajahonka, M., & Westerlund, M. (2020). Actors in the Emerging Internet of Things Ecosystems. *Securing the Internet of Things: Concepts, Methodologies, Tools, and Applications* (pp. 1587-1607). USA: Information Resources Management Association. [Status: Published]
Description: International Journal of E-Services and Mobile Applications (2017) article republished as a book chapter: Leminen, S., Rajahonka, M., & Westerlund, M. (2020).
- Leminen, S., Rajahonka, M., & Westerlund, M. (2020). Actors in the Emerging Internet of Things Ecosystems. *Sustainable Business: Concepts, Methodologies, Tools, and Applications* (pp. 617-637). USA: Information Resources Management Association. [Status: Published]
Description: International Journal of E-Services and Mobile Applications (2017) article republished as a book chapter: Leminen, S., Rajahonka, M., & Westerlund, M.
- Westerlund, M., Craigen, D., Bailetti, T., & Agwae, U. (2019). A Three-vector Approach to Blind Spots in Cybersecurity. In Mehdi Khosrow-Pour, D.B.A. (Ed.), *Advanced Methodologies and Technologies in System Security, Information Privacy, and Forensics* (pp. 93-104). USA: IGI Global. [Status: Published]
- Westerlund, M., Craigen, D., Bailetti, A., & Agwae, U. (2018). A Three-vector Approach to Blind Spots in Cybersecurity. In Khosrow-Pour, M. (Ed.), *Encyclopedia of Information Science and Technology (4th edition)* (pp. 1684-1693). IGI Global. [Status: Published]
Description: DOI: 10.4018/978-1-5225-2255-3.ch147
- Leminen, S., Huhtala, J., Rajahonka, M., & Westerlund, M. (2016). Business Model Convergence and Divergence in Publishing Industries. In Lugmayr, A., & Zotto, C.D. (Eds.), *Media Convergence Handbook – Volume I* (pp. 187-200). Germany: Springer-Verlag. [Status: Published]
Description: Journalism, Broadcasting, and Social Media Aspects of Convergence.
- Suomala, J., Palokangas, L., Leminen, S., Westerlund, M., & Heinonen, J. (2016). Neuromarketing: Understanding Customer's Subconscious Responses to Marketing. *Best of TIM Review*. Talent First Network. [Status: Published]
Description: eBook Kindle edition
- Leminen, S., & Westerlund, M. (2015). Incremental and Radical Service Innovation in Living Labs. In Information Resources Management Association (IRMA) (Ed.), *Economics: Concepts, Methodologies, Tools, and Applications* (pp. 445-459). USA: IGI Global. [Status: Published]
- Leminen, S., & Westerlund, M. (2015). Cities as Labs: Towards Collaborative Innovation in Cities. In Lappalainen, P., Markkula, M. & Kune, H. (Eds.), *Orchestrating Regional Innovation Regional Innovation Ecosystem- Espoo Innovation Garden* (pp. 167-175). Finland: Otavan Kirjapaino. [Status: Published]
- Leminen, S., Westerlund, M., Sánchez, L., & Serra, A. (2014). Users as content creators, aggregators, and distributors at Citilab Living Lab. In DeFillippi, R. & Wikström, P. (Eds.), *International Perspectives on Business Innovation and Disruption in the Creative Industries: Film, Video and Photography* (pp. 247-265). Edward Elgar Publishing Ltd. [Status: Published]
- Leminen, S., & Westerlund, M. (2014). Incremental and Radical Service Innovation in Living Labs. In Christiansen, B., Yildiz, S. & Yildiz, E. (Eds.), *Transcultural Marketing for Incremental & Radical Innovation* (pp. 281-295). Hershey, Pennsylvania, USA: Information Science Reference. [Status: Published]
- Bailetti, A., Weiss, M., Muegge, S., & Westerlund, M. (2014). Lead To Win: An ecosystem approach to making universities more entrepreneurial. In A. Meerman & T. Kiewe (Eds.), *UIIN Good Practice Series 2014: Fostering University-Industry Relationships, Entrepreneurial Universities and Collaborative Innovation* (pp. 397-408). University Industry Innovation Network. [Status: Published]
- Leminen, S., Rajahonka, M., & Westerlund, M. (2013). Modular Business Models Combining Traditional and E-Reading Services. In Hafkesbrink, Joachim & Shire, Karen (Eds.), *Flexibilität und Stabilität in der Verlags- und Medienbranche [Flexibility and Stability in the Publishing and Media Industry]* (pp. 225-257). Lohmar, Germany: Josef Eul Verlag. [Status: Published]
- Leminen, S., & Westerlund, M. (2013). Categorizing the Growth Strategies of Small Firms. In Bailetti, T. & Hurley, B. (Eds.), *Best of TIM Review for Technology Entrepreneurs [Kindle Ed.]*. Ottawa: Talent First Network. [Status: Published]
- Wiklund-Engblom, A., Leminen, S., Westerlund, M., Staffans, S., Esch, M., R. Rajala (2012). Towards Transmedia Innovation: An Empirical Analysis of a Multiplatform Format. In Ibrus, I. & Scolari, C.A. (Eds.), *Crossmedia Innovations: Texts, Markets, Institutions* (pp. 179-198). Hamburg: Peter Lang. [Status: Published]
- Leminen, S., Westerlund, M., Rajahonka, M., & Sirurainen, R. (2012). Towards IOT ecosystems and business models. In Andreev, S., Balandin, S. & Koucheryav, Y. (Eds.), *Internet of Things, Smart Spaces, and Next Generation Networking - Lecture Notes in Computer Science, Vol. 7469* (pp. 15-26). Springer. [Status: Published]
- Westerlund, M., Rajala, R., Tuunanen, T., & Salo, J. (2012). The influence of content and trust on consumers' intention to accept mobile advertisements. In Information Resources Management Association IRMA (Ed.), *E-Marketing: Concepts, Methodologies, Tools and Applications, Vol. 1*. (pp. 836-850). IGI. [Status: Published]

Other (Non-refereed) Scholarly Publications

Articles in non-Refereed journals

Basic or Discovery Scholarship

Westerlund, M., & Rajala, R. (2011). Reseller-perceived Value of Digital Channel Marketing in IT Security Business. *The Business Review, Cambridge, 18 (2)*, 171-178.

2013 ABDC: C

Other Publications

Other Publications

2018: McPhee, C., Leminen, S., Schuurman, D., Westerlund, M., & Huizingh, E. *Editorial: Living Labs*. Technology Innovation Management Review, 8(12): 3-6

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Academic PRJ

2021 – 2022: Technology Innovation Management Journal (International).

Editor: Guest Editor of Journal

2022 – 2024: International Journal of Technology Management (International). Guest editor of a 2024 special issue of the International Journal of Technology Management on "Emerging technologies, Business models, Ecosystems, and Platforms in the B2B context" with S. Leminen & A.-G. Nyström

2023: Journal of Product Innovation Management (International). Guest editor of a 2025 special issue of the Journal of Product Innovation Management on "Innovation via Business-to-Business (B2B) Digital Platforms, Platform Ecosystems, and Platform-based Business Models" with S. Leminen, K. Randhawa, V. Parida, & M. Jovanovich.

2021 – 2022: R&D Management (International). Guest editor of a 2022 special issue of R&D Management on "Places and Spaces of Collaborative R&D and Innovation: Physical, Virtual and Cognitive Contexts" with S. Leminen, K. Greve & P. Ritala

2018: Technology Innovation Management Review (International). Guest editor of December 2018 issue of the Technology Innovation Management Review on "New Approaches and Developments in Living Labs" with D. Schuurman, S.R.E. Huizingh & S. Leminen

2017: Technology Innovation Management Review (International). Guest editor of January 2017 and February 2017 issues of the Technology Innovation Management Review on "Innovation in Living Labs" with D. Schuurman, P. Ballon & S. Leminen

2016: Technology Innovation Management Review (International). Guest editor of December 2016 issue of the Technology Innovation Management Review on "Smart Cities and Regions" with T. Tukiainen & S. Leminen

2015 – 2016: Technology Innovation Management Review (International). Guest editor of December 2015 and January 2016 issues of the Technology Innovation Management Review on "Living Labs and User Innovation", special issue related to the ISPIM 2015 conference with S. Leminen, D. Schuurman, & E. Huizingh

2012 – 2015: Technology Innovation Management Review (International).

Presentations

Papers Presented at Conferences

Refereed

McPhee, C., Schillo, S., Westerlund, M., Nguyen, V., Beaudoin, C., Berberi, A., Bronson, K., Devkota, R., Jasmin, J.-F., Joncoux, S., & Saul, D. (2021). *Evaluation of living labs focused on agricultural or environmental sustainability*. ISPIM Innovation Conference, Berlin, Germany.

Bailetti, A., Muegge, S., Weiss, M., & Westerlund, M. (2014, April). *An ecosystem approach to making universities more entrepreneurial*. University-Industry Interaction (UIIN) Conference, Barcelona, Spain.

Leminen, S., Westerlund, M., Heinonen, J., & Suomala, J. (2013). *Neuromarketing as a tool to understand customers' valuation processes*. International Service Innovation and Design Annual Seminar, Espoo, Finland.

Description: March 14, 2013.

Leminen, S., Westerlund, M., Sanchez, L., & Serra, A. (2013). *Media co-creation with users at Citilab Living Lab*. International Media Management Academic Association (IMMAA), Lisbon, Portugal.

Description: May 3-4, 2013.

Westerlund, M., Leminen, S., Rajahonka, M., & Siuruainen, R. (2013). *Internet of Things - Opportunities for Innovative Services and Networked Business Models*. International Service Innovation and Design Annual Seminar, Espoo, Finland.

Description: March 14, 2013.

Korhonen, H., Westerlund, M., Mikkola, M., Kaarela, I., & Ryyänen, T. (2012). *Practices for Involving Customer Organizations in Service Innovation*. AMA SERV SIG International Service Research Conference, Helsinki, Finland.

Description: June 7-9, 2012.

Leminen, S., Westerlund, M., & Kortelainen, M. (2012). *Service Innovation Strategies in Living Lab Networks*. AMA SERV SIG International Service Research Conference, Helsinki, Finland.

Description: June 7-9, 2012.

Leminen, S., Nystrom, A., & Westerlund, M. (2012). *Users' roles for co-creation of innovation in living lab networks*. Users and Innovation Research Seminar, Espoo, Finland.

Description: October 9, 2012. INUSE 2012 - Users and Innovation Research Seminar.

Leminen, S., Westerlund, M., Rajahonka, M., & Siuruainen, R. (2012). *Internet of Things (IoT) - Opportunities for Innovative Service Business Models*. Service Operations Management Forum, Cambridge, United Kingdom.

Description: September 19-20, 2012.

Leminen, S., Nystrom, A., & Westerlund, M. (2012). *Users' roles for co-creation of innovation in living lab networks*. ENoll Living labs Summer School, Espoo/Helsinki, Finland.

Description: August 20-23, 2012.

Other Presentations

Invited Lecture

2022: Technology Innovation Management. Advanced topics in TIM: Responsible AI & Ethics (TIMG5103), Guest lecture on "Ethical challenges in AI – Examples from the edge", Carleton University, Technology Innovation Management (May 25)

Contract or Other Research

Research Grants and Awards

Grants

2021: Westerlund, M. Mitacs Business Strategy Internship (\$10,000.00), Principal Investigator, Mitacs. Mitacs Business Strategy Internship (BSI) (as the academic advisor of Bushra Munaf's internship at The Society of Obstetricians and Gynecologists of Canada); Ref#IT25243, awarded by Mitacs (total: \$10,000 CAD). [Status: Funded]

2021: Westerlund, M. Mitacs Business Strategy Internship (\$10,000.00), Principal Investigator, Mitacs. [Status: Funded]

2020 [Year 6 of 6]: Westerlund, M. Early Researcher Award (\$16,667.00 Not Funded), Principal Investigator, Ministry of Research and Innovation. [Status: Not Funded]

2020 [Year 5 of 5]: Westerlund, M. Early Researcher Award (\$10,000.00 Not Funded), Principal Investigator, Carleton University. [Status: Not Funded]

2019 [Year 5 of 6]: Westerlund, M. Early Researcher Award (\$16,667.00 Not Funded), Principal Investigator, Ministry of Research and Innovation. [Status: Not Funded]

2019 [Year 4 of 4]: Westerlund, M. Insight Grant (\$48,605.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2019 [Year 4 of 5]: Westerlund, M. Early Researcher Award (\$10,000.00 Not Funded), Principal Investigator, Carleton University. [Status: Not Funded]

2018 [Year 4 of 6]: Westerlund, M. Early Researcher Award (\$16,667.00 Not Funded), Principal Investigator, Ministry of Research and Innovation. [Status: Not Funded]

2018 [Year 3 of 4]: Westerlund, M. Insight Grant (\$48,605.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2018 [Year 3 of 5]: Westerlund, M. Early Researcher Award (\$10,000.00 Not Funded), Principal Investigator, Carleton University. [Status: Not Funded]

2017 [Year 3 of 6]: Westerlund, M. Early Researcher Award (\$16,667.00 Not Funded), Principal Investigator, Ministry of Research and Innovation. [Status: Not Funded]

2017 [Year 2 of 4]: Westerlund, M. Insight Grant (\$48,605.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2017 [Year 2 of 5]: Westerlund, M. Early Researcher Award (\$10,000.00 Not Funded), Principal Investigator, Carleton University. [Status: Not Funded]

2016 [Year 2 of 6]: Westerlund, M. Early Researcher Award (\$16,667.00 Not Funded), Principal Investigator, Ministry of Research and Innovation. [Status: Not Funded]

2016 [Year 1 of 4]: Westerlund, M. Insight Grant (\$48,605.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

2016 [Year 1 of 5]: Westerlund, M. Early Researcher Award (\$10,000.00 Not Funded), Principal Investigator, Carleton University. [Status: Not Funded]

2015: Westerlund, M. Whyz Technologies Ltd. - Contract (\$13,300.00), Principal Investigator, Whyz Technologies Ltd.. [Status: Funded]

2015 [Year 1 of 6]: Westerlund, M. Early Researcher Award (\$16,667.00 Not Funded), Principal Investigator, Ministry of Research and Innovation. [Status: Not Funded]

2013: Westerlund, M. Start-up Funds (\$5,000.00), Principal Investigator, Carleton University, Vice-President (Research and International). [Status: Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Moderator / Facilitator

2021: ISPIIM Innovation Conference. Junior Researcher Lab Session Co-facilitator ("AI & innovation"), ISPIIM Innovation Conference 2021, Berlin, Germany [virtual conference], June 19-22.

2021: ISPIIM Innovation Conference. Session Facilitator/Track Chair ("Places & spaces of collaborative R&D & innovation 3"), ISPIIM Innovation Conference 2021, Berlin, Germany [virtual conference], June 19-22.

Board Member: Advisory Board

2014 – 2015: NeuroService, Laurea University of Applied Sciences, Vantaa, Finland.

Board Member: PRJ Editorial Review Board

2020: ROBONOMICS: The Journal of the Automated Economy.

2015 – 2019: International Journal of Productivity Management and Assessment Technologies.

Chair: Conference / Track / Program

2019: ISPIIM Connects, Ottawa, Canada-Ontario. Session Facilitator/Track Chair ("Platform based businesses"), ISPIIM Connects Ottawa 2019, Ottawa, Canada, April 7-10.

2017: ISPIIM Innovation Forum, Toronto, Canada-Ontario. "Innovation Implementation", ISPIIM Innovation Forum 2017, Toronto, Canada, March 19-22.

Invited Lecture

2022: Technology Innovation Management. Advanced topics in TIM: Responsible AI & Ethics (TIMG5103), Guest lecture on "Ethical challenges in AI – Examples from the edge", Carleton University, Technology Innovation Management (May 25)

Member: Committee/Task Force

2014 – 2019: International Society for Professional Innovation Management (ISPIIM) Scientific Panel.

Other Professional Service Activities

2022: Ca' Foscari University of Venice, Venice, Italy. Ca' Foscari University of Venice (G@V – Research and Training for Global Challenges Cofund Fellowship application reviewer), Italy

2022: Research Grants Council (RGC) of Hong Kong, Hong Kong, Republic of Korea. Research Grants Council (RGC) of Hong Kong, (GFR & ECS research funding application reviewer), China

2021: Cross-border for Local Value. Judge (Opportunity competition), Cross-border for Local Value (CBLV)

2021: USN School of Business, University of South-Eastern Norway. Assessor for Master's level innovation and entrepreneurship courses at the USN School of Business, University of South-Eastern Norway

2020: Judge (AI Opportunity), AI for Local Value Competition (SERS).

2019: Netherlands Organisation for Scientific Research, The Hague, Netherlands. The Netherlands Organisation for Scientific Research (NWO) (research funding application reviewer),

2019: Mitacs Accelerate, Ottawa, Canada. Mitacs Accelerate (research funding application reviewer)

2018: Reviewer, MIUR (Italian Ministry for Education, University and Research), Rome, Italy. PRIN 2017 research funding application reviewer

2017: The Netherlands Organisation for Scientific Research (NWO), Research funding application reviewer, The Hague, Netherlands.

2017: Knowledge Foundation, research funding application reviewer, Stockholm, Sweden.

Reviewer - External Tenure

2022: Bentley University, Waltham, Massachusetts.

2021: Linz Institute of Technology, Johannes Kepler University Linz.

Reviewer: Ad Hoc Reviewer for a Journal

2023: ISPIIM Innovation Conference, Ljubljana, Slovenia.

Reviewer: Book / Textbook

2020: Palgrave Macmillan.

2018: IGI Global. Member of the Editorial Advisory Board and Reviewer for "Global Cyber Security Labor Shortage and International Business Risk", Christiansen, B. & Piekarz, A. (Eds.)(2019). IGI Global. DOI: 10.4018/978-1-5225-5927-6

2018: Emerald Publishing. Reviewer for a book proposal submitted to Emerald Publishing (Entrepreneurship area)

2017: Elsevier. Reviewer for a book proposal submitted to Elsevier (Smart Cities and Transportation area)

2017: IGI Global. Member of the Editorial Advisory Board and Reviewer for "Emerging Economic Models for Global Sustainability and Social Development", Christiansen, B., Sysoeva, I., Udovikina, A. & Ketova, A. (Eds.)(2019). IGI Global. DOI: 10.4018/978-1-5225-5787-6

Reviewer: Conference Paper

2022: HICSS Conference, Hawaii, Hawaii.

2021 – 2022: ISPIIM Innovation Conference, Copenhagen, Denmark.

2021: ACM CHI 2022 Conference.

2020 – 2021: EMAC Annual Conference.

2020 – 2021: EURAM Annual Conference.

2020: IMP Asia Conference.

2020: ISPIIM Connects Global.

2019: EMAC Annual Conference, Hamburg, Germany. EMAC 48th Annual Conference, Hamburg, Germany

2019: ISPIIM Innovation Conference, Florence, Italy. XXX ISPIIM Innovation Conference, Florence, Italy

2019: Bled eConference, Bled, Slovakia. 32nd Bled eConference 2019, Bled, Slovakia

2019: ISPIIM Connects, Bangkok, Thailand. ISPIIM Connects Bangkok 2020 Conference, Bangkok, Thailand

2018: AIB 2018 Annual Meeting, Minneapolis, Minnesota.

2018: EMAC Regional Conference. 9th EMAC Regional Conference, Prague, Czech Republic

2018: ISPIIM Connects Ottawa, Ottawa, Canada-Ontario.

2017 – 2018: ISPIIM Innovation Conference, Stockholm, Sweden.

2017: ISPIIM Innovation Forum, Toronto, Canada-Ontario.

2017: AIB Annual Meeting, Dubai, United Arab Emirates.

2017: EMAC Annual Conference, Groningen, Netherlands.

2017: ISPIIM Innovation Summit, Melbourne, Australia.

2017: EMAC Annual Conference, Glasgow, United Kingdom.

2017: ISPIIM Innovation Forum, Boston, Massachusetts.

Scholarly Work in Progress

Papers Under Review

Isabelle, D., Han, Y., & Westerlund, M. (2020). "A machine-learning based analysis of the impacts of the COVID-19 pandemic on small business owners," Initial submission.

Description: International Small Business Journal

Isabelle, D., Westerlund, M., & Sajuyigbe, V. (2020). "Building legitimacy and distinctiveness on Nigerian- Canadian transnational firms' websites," 2nd revise and resubmit to *Africa Journal of Management*.

Isabelle, D., Westerlund, M., & Mane, M. (2019). "The role of analytics in data-driven business models for digital platforms in the food industry," Initial submission to *Creativity and Innovation Management*.

Leminen, S., Nousiainen, A. K., Westerlund, M., & Rajala, R. (2018). "New service platforms and value creation practices in the book publishing industry," Initial submission to *International Journal of Technology Management*.

Leminen, S., Rajahonka, M., Wendelin, R., & Westerlund, M. (2018). "Machine-to-machine business models in the Internet of Things age," Initial submission to *Industrial Marketing Management*.

Leminen, S., Niitamo, V.P., & Westerlund, M. (2018). "Living Labs: From Scattered Initiatives to Global Movement," Revision under 4th review to *Creativity and Innovation Management*.

Westerlund, M., Rajala, R., Isabelle, D., & Luminen, S. (2016). "Digitalization in retailing: implications to niche food e-commerce.," Revised and resubmitted to *Journal of Research in Interactive Marketing*.

Description: December 2016

Working Papers

Isabelle, D. & Westerlund, M. (2022). "An application of machine learning topic modelling to research themes in international business conferences."

Isabelle, D., Westerlund, M., Leminen, S., & Rajala, R. (2018). "Entrepreneurial perception of public venture capital and its effects on the performance of small international companies."

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	TIMG5003	Issues in Technology Innovation Management	0.5	73	Main	100%
2024/Winter	TIMG5303	Machine Learning for Technology Entrepreneurship Problem-Solving	0.5	100	Main	100%
2023/Fall	TIMG5003	Issues in Technology Innovation Management	0.5	47	Main	100%
2023/Summer	TIMG5101	Integrated Product Development	0.5	58	Main	100%
2023/Winter	TIMG5003	Issues in Technology Innovation Management	0.5	35	Main	100%
2022/Fall	TIMG5003	Issues in Technology Innovation Management	0.5	56	Main	100%
2022/Summer	TIMG5101	Integrated Product Development	0.5	84	Main	100%
2022/Winter	TIMG5003	Issues in Technology Innovation Management	0.5	34	Main	100%
2021/Fall	TIMG5003	Issues in Technology Innovation Management	0.5	65	Main	100%
2021/Summer	TIMG5101	Integrated Product Development	0.5	49	Main	100%
2021/Winter	TIMG5003	Issues in Technology Innovation Management	0.5	37	Main	100%
2020/Fall	TIMG5003	Issues in Technology Innovation Management	0.5	44	Main	100%
2020/Summer	TIMG5101	Integrated Product Development	0.5	61	Main	100%
2020/Winter	TIMG5003	Issues in Technology Innovation Management	0.5	76	Main	100%
2019/Fall	TIMG5003	Issues in Technology Innovation Management	0.5	69	Main	100%
2019/Summer	TIMG5101	Integrated Product Development	0.5	37	Main	100%
2019/Winter	TIMG5003	Issues in Technology Innovation Management	0.5	47	Main	100%
2018/Fall	TIMG5003	Issues in Technology Innovation Management	0.5	50	Main	100%
2018/Summer	TIMG5101	Integrated Product Development	0.5	38	Main	100%
2018/Winter	TIMG5003	Issues in Technology Innovation Management	0.5	39	Main	
2017/Fall	TIMG5003	Issues in Technology Innovation Management	0.5	44	Main	100%
2017/Winter	TIMG5005	Customer Value Creation in Technology Firms	0.5	55	Main	100%
2016/Fall	TIMG5003	Issues in Technology Innovation Management	0.5	47	Main	100%
2016/Summer	TIMG5101	Integrated Product Development	0.5	19	Main	100%
2016/Winter	TIMG5005	Customer Value Creation in Technology Firms	0.5	50	Main	100%
2016/Winter	TIMG5003	Issues in Technology Innovation Management	0.5	50	Main	100%
2015/Fall	TIMG5104	Directed Studies: Technology Innovation Management	0.5	2	Main	100%
2015/Summer	TIMG5101	Integrated Product Development	0.5	30	Main	100%
2015/Summer	TIMG5104	Directed Studies: Technology Innovation Management	0.5	3	Main	100%

Service to the institution (Academic)

University Assignments

Masters Thesis Committees:

2022-2023: (M.Des. master's thesis) Shiva Pouryousef

PhD. Comprehensive Committees:

2023-2024: Ali Nazari

External Committees

Thesis Assignments

PhD. Thesis Committees:

2023-2024: Neil

2023-2024: Anette Myhre Momrak

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2021-2022: TIM Review

2016-2017: Hiring Committee - Entrepreneurship Faculty (Co-Chair)

H. OTHER

Student Experience Activities

2022 - Judge (Project competition), TIMG 5201 Make a Difference Projects

Credentials

Professional Memberships

International Society for Professional Innovation Management, 2014

Academy of Marketing Science, 2009–2010

Institute for Operations Research and the Management Sciences (INFORMS), 2008–2009

Business Model Community (BMC), 2008

American Marketing Association (AMA), 2007–2010

Finnish Graduate School of Marketing, 2004–2009

Industrial Marketing and Purchasing Group (IMP), 2004

Skills

Languages

Finnish Native level (read/write/speak) English Full proficiency (read/write/speak) German Limited proficiency (read/write/speak) Swedish Limited proficiency (read/write/speak) Japanese Elementary level (speak)

Curriculum Vitae - Sprott School of Business

Yan (Nicole) Yang, PhD
Assistant Professor, Teaching Stream - Preliminary - Tenure Track
Sprott School of Business (Finance)
Telephone:
Email: Nicole.Yang@carleton.ca
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Queen's University.

B. EMPLOYMENT

C. PROFESSIONAL HONOURS

2023: Conference and Research Funding, Queen's University.
2023: Smith School of Business Award, Queen's University.
2023: Graduate Research Fellowship, Queen's University.
2023: Conference on Empirical Legal Studies Travel Sponsorship, The University of Chicago.
2023: ABFER Conference Travel Sponsorship, Asian Bureau of Finance and Economic Research.
2023: AFA Travel Grant, American Finance Association.
2022: Conference and Research Funding, Queen's University.
2022: Smith School of Business Award, Queen's University.
2022: Queen's Graduate Award, Queen's University.
2021: Conference and Research Funding, Queen's University.
2021: Smith School of Business Award, Queen's University.
2020: Conference and Research Funding, Queen's University.
2020: Smith School of Business Award, Queen's University.
2020: Graduate Research Fellowship, Queen's University.
2019: Conference and Research Funding, Queen's University.
2019: Smith School of Business Award, Queen's University.
2018: Conference and Research Funding, Queen's University.
2018: Smith School of Business Award, Queen's University.
2017: Funding for Python Web Scraping Camp, Lingnan University.
2017: Postgraduate Studentship, Lingnan University.
2015 – 2016: Postgraduate Studentship, Lingnan University.
2014: National Scholarship, Ministry of Education, PRC.
2011 – 2014: Excellent School Journalist, Shandong University.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total

Refereed Scholarly Publications

Articles in Refereed Journals

Dong, Y., Willcott, N., Yang, X., & Yang, Y. (2025). Growing up in the modern world: how does artificial intelligence enhance firm growth?
Managerial Finance. [B]

Article publication date: 15 January 2025

Jacoby, G., Li, S., Lin, N., & Yang, Y. (2024). Disagreement exploitation and the cross-section of hedge fund performance. *Financial Management*,

First published: 21 August 2024

Jiang, W., Wang, W., & Yang, Y. (in press, 2023). The Disappeared Outperformance of Post-reorg Equity. *The Journal of Alternative Investments*, 25 (3), 118-137.

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Non-Refereed

Yang, Y. (2024). *Unknown*. The 2024 CAAA Annual Meeting, Unknown, Unknown.

Yang, Y. (2024). *Unknown*. The 2024 EFA Annual Meeting, Unknown, Unknown.

Yang, Y. (2024). *Unknown*. The 2024 AFA PhD Student Poster Session, Unknown, Unknown.

Yang, Y. (2024). *Unknown*. The 2024 Cross Country Perspectives in Finance (CCPF), Unknown, Unknown.

Yang, Y. (2024). *Unknown*. Texas A&M University, College Station, Texas.

Yang, Y. (2024). *Unknown*. The University of Texas at Dallas, Dallas, Texas.

Yang, Y. (2024). *Unknown*. The 37th Australian Finance & Banking Conference, Unknown, Australia.

Contract or Other Research

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Discussant

2023: FMA. Real Estate Values and Corporate Yield Spreads, Yifei Li and Anni Wang

2023: FMCG. Does Own Innovation or Creative Destruction Matter More for Resource Reallocation in Competitive Industries?, Chi Zhang and Xi Li

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Credentials

Curriculum Vitae - Sprott School of Business

Yuriy Zabolotnyuk, PhD
Associate Professor - Tenured, 2013
Sprott School of Business (Finance)
Telephone: 613-520-2600 x3206
Email: yuriy.zabolotnyuk@carleton.ca
AACSB Qualification: Practice Academic (PA) , Participation: Participating
OrcID: <https://orcid.org/0000-0002-6891-0487>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. Simon Fraser University.

Title: *Thesis Title: Three Essays in Options and Convertible Bonds. Committee: Robert Grauer, Robert Jones (co-chair), Geoffrey Poitras, Chris Veld (chair). Job Market Paper: An Empirical Comparison of Convertible Bond Valuation Models.*

Master of Arts. Kiev School of Economics.

Title: *Thesis Title: Fiscal Policy and Private Sector Behaviour: Evidence from Transition Economies. Committee: Serguei Maliar (chair)*

Master of Science. Kiev State University.

Title: *High Honours*

Bachelor of Science. Kiev State University.

Title: *High Honours*

Professional Certifications

Chartered Financial Analyst (CFA), --N/A--, Charlottesville, VA, USA.

Financial Risk Manager (FRM), --N/A--, Jersey City, NJ, USA.

B. EMPLOYMENT

Academic Appointments

School Manager/Director, Sprott School of Business (July, 2022 - Present), Ottawa, Canada. Master of Finance (MFin) Academic Director

Associate Professor of Finance, Sprott School of Business, Carleton University (July, 2015 - Present), Ottawa, Canada-Ontario.

Adjunct Professor, Adam Smith School of Business, University of Glasgow (May, 2013 - Present), Glasgow, Scotland.

Visiting Professor, Aarhus University Summer School (July, 2019 - August, 2019), Aarhus, Denmark.

Visiting Associate Professor, Beedie School of Business, Simon Fraser University (July, 2015 - June, 2016), Burnaby, Canada-British Columbia.

Assistant Professor of Finance, Sprott School of Business, Carleton University (July, 2008 - June, 2015), Ottawa, Canada-Ontario. Tenured

Other Employment

Educational Chair, Ottawa CFA Society (September, 2013 - May, Present), Ottawa, Canada-Ontario.

Research Assistant, N/A (September, 2006 - May, 2008), N/A, Unknown. Dr. Andrey Pavlov

Research Assistant, N/A (August, 2005 - June, 2008), N/A, Unknown. Dr. Chris Veld

Research Assistant, N/A (January, 2007 - December, 2007), N/A, Unknown. Dr. Yasheng Chen

Economics Analyst, Parliament of Ukraine (September, 2002 - May, 2003), N/A, Ukraine.

C. PROFESSIONAL HONOURS

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals	1	1		2
Articles-in-Progress (All)		1		1
Paper Presentations (Refereed)	1			1
Grants - Funded (both refereed and non-refereed)		4		4

Totals	2	6		8

Refereed Scholarly Publications

Articles in Refereed Journals

Afik, Z., & Zabolotnyuk, Y. (2023). Information effect of credit rating announcements in transition economies. *Journal of International Financial Markets, Institutions and Money*, 89, 101878. [A]

Chris, V., Verwijmeren, P., & Zabolotnyuk, Y. (2020). Wealth Effects of Seasoned Equity Offerings: a Meta Analysis. *International Review of Finance*. [A]

Forthcoming. Early View Online Version of Record before inclusion in an issue. July 2018.

IMPORTANT: This article was published in 2020, hasn't been paid and a first page hasn't been submitted as of July 2021

Zabolotnyuk, Y. (2018). Wealth Effects of Bond Rating Announcements. *Multinational Finance Journal*, 22 (3/4), 211-254. [B]

Gundy, B., Veld, C., Verwijmeren, P., & Zabolotnyuk, Y. (2014). Why are conversion-forcing call announcements associated with negative call effects? *Journal of Corporate Finance*, 24, 149-157. [A+]

Veld, C., & Zabolotnyuk, Y. (2012). Optimal call policy for convertible bonds: is there a market memory effect. *Applied Economic Letters*, 19 (7), 661-664. [B]

Zabolotnyuk, Y., Jones, R., & Veld, C. (2010). An empirical comparison of convertible bond valuation models. *Financial Management*, 39 (2), 675-706. [A]

Other (Non-refereed) Scholarly Publications

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Presentations

Papers Presented at Conferences

Refereed

Zabolotnyuk, Y. (2022). *Unknown*. Journal of International Financial Markets, Institutions & Money, Virtual, Virtual.

Zabolotnyuk, Y. (2015). *Unknown*. Multinational Finance Society Annual Conference, Halkidiki, Greece.

Zabolotnyuk, Y. (2014). *Unknown*. World Finance Conference, Buenos Aires, Argentina.

Zabolotnyuk, Y. (2014). *Unknown*. Multinational Finance Society Annual Conference, Prague, Czech Republic.

Zabolotnyuk, Y. (2014). *Unknown*. Northern Finance Association (NFA) Conference, Ottawa, Canada-Nunavut.

Zabolotnyuk, Y. (2013). *Unknown*. World Finance Conference, Venice, Italy.

Zabolotnyuk, Y. (2012). *Unknown*. Global Conference on Business and Finance, San Jose, Costa Rica.

Zabolotnyuk, Y. (2011). *Unknown*. Global Conference on Business and Finance, San Jose, Costa Rica.

Contract or Other Research

Research Grants and Awards

Grants

2025 [Year 6 of 6]: Zabolotnyuk, Y. Collaborative Research and Training Experience, Co-Investigator, PRI-Carleton University. co-applicant. [Status: Funded]

2024 [Year 5 of 6]: Zabolotnyuk, Y. Collaborative Research and Training Experience, Co-Investigator, PRI-Carleton University. co-applicant. [Status: Funded]

2023 [Year 4 of 6]: Zabolotnyuk, Y. Collaborative Research and Training Experience, Co-Investigator, PRI-Carleton University. co-applicant. [Status: Funded]

2022 [Year 3 of 6]: Zabolotnyuk, Y. Collaborative Research and Training Experience, Co-Investigator, PRI-Carleton University. co-applicant. [Status: Funded]

2021 [Year 2 of 6]: Zabolotnyuk, Y. Collaborative Research and Training Experience, Co-Investigator, PRI-Carleton University. co-applicant. [Status: Funded]

2020 [Year 1 of 6]: Zabolotnyuk, Y. Collaborative Research and Training Experience, Co-Investigator, PRI-Carleton University. co-applicant. [Status: Funded]

2015: Zabolotnyuk, Y. Insight Development Grant (\$26,292.00 Not Funded), Principal Investigator, GOV-Social Sciences and Humanities Research Council (SSHRC). [Status: Not Funded]

Other Professional Activities

Scholarly Work in Progress

Papers Under Review

Smith, Z., Al Janabi, M., Mumtaz, M., & Zabolotnyuk, Y. (2018). "Blockchain and The Future of Securities Exchanges," Initial submission to *Small*

Business Economics: An Entrepreneurship Journal.

Veld, C., erwijmeren, P., & Zabolotnyuk, Y. (2017). "Wealth Effects of Seasoned Equity Offerings: a Meta Analysis," Initial submission to *International Review of Finance*.

Zabolotnyuk, Y. (2017). "Effects of Bond Rating Announcements on Stock Prices: Meta-Analysis Study," 2nd revise and resubmit to *Multinational Finance Journal*.

Working Papers

Zabolotnyuk, Y. (2019). "Setting the Benchmark: Curious Case of Canadian Dollar Offering Rate."

Description: Working paper

Tkhagapsov, I. & Zabolotnyuk, Y. (2017). "The Underpricing and Long-term Performance of technology IPOs."

Description: Working paper

Zabolotnyuk, Y. (2017). "Pension fund performance in low-interest rate environment: evidence from Canada."

Description: Work in progress

Zabolotnyuk, Y. & Weirong, Y. (2017). "Venture Capital and IPO Underpricing: Evidence from Chinese Growth Enterprise Market."

Description: Working Paper

Zabolotnyuk, Y. (2017). "Bond Rating Announcements in Canada."

Description: Working Paper

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	FINA5531	Fixed Income Analysis 1	0.25	15	Main	100%
2024/Winter	FINA5516	Derivatives	0.25	15	Main	100%
2024/Winter	FINA5514	Micro Finance	0.25	14	Main	100%
2024/Winter	FINA5502	Corporate Finance	0.25	17	Main	100%
2024/Winter	FINA5532	Fixed Income Analysis 2	0.25	15	Main	100%
2023/Fall	FINA5514	Micro Finance	0.25	39	Main	100%
2023/Fall	FINA5511	Investments	0.25	13	Main	100%
2023/Fall	BUSI3512	Derivatives	0.5	28	Main	100%
2023/Fall	BUSI3512	Derivatives	0.5	23	Main	100%
2023/Summer	FINA5514	Micro Finance	0.25	16	Main	100%
2023/Summer	ACCT5130	Advanced Finance	0.5	19	Main	100%
2023/Summer	ACCT5130	Advanced Finance	0.5	26	Main	100%
2023/Winter	FINA5502	Corporate Finance	0.25	13	Main	100%
2023/Winter	FINA5502	Corporate Finance	0.25	9	Main	100%
2023/Winter	BUSI5906	Special Topics	0.25	38	Shanghai	100%
2023/Winter	FINA5502	Corporate Finance	0.25	23	Main	100%
2022/Fall	FINA5511	Investments	0.25	16	Main	100%
2022/Fall	BUSI3512	Derivatives	0.5	45	Main	100%
2022/Fall	BUSI3512	Derivatives	0.5	22	Main	100%
2022/Summer	ACCT5130	Advanced Finance	0.5	22	Main	100%
2022/Summer	ACCT5130	Advanced Finance	0.5	29	Main	100%
2022/Winter	FINA5502	Corporate Finance	0.25	17	Main	100%
2021/Fall	BUSI5906	Special Topics	0.25	35	Shanghai	100%

2021/Summer	BUSI5906	Special Topics	0.25	28	Shanghai	100%
2021/Summer	ACCT5130	Advanced Finance	0.5	23	Main	100%
2021/Summer	ACCT5130	Advanced Finance	0.5	30	Main	100%
2021/Winter	FINA5502	Corporate Finance	0.25	26	Main	100%
2020/Fall	BUSI3512	Derivatives	0.5	39	Main	100%
2020/Fall	BUSI3512	Derivatives	0.5	39	Main	100%
2020/Fall	FINA5511	Investments	0.25	32	Main	100%
2020/Fall	BUSI4511	Fixed Income Analysis	0.5	23	Main	100%
2020/Summer	ACCT5130	Advanced Finance	0.5	28	Main	100%
2020/Summer	ACCT5130	Advanced Finance	0.5	29	Main	100%
2020/Winter	FINA5502	Corporate Finance	0.25	22	Main	100%
2020/Winter	BUSI3512	Derivatives	0.5	60	Main	100%
2019/Fall	BUSI3512	Derivatives	0.5	41	Main	100%
2019/Fall	BUSI3512	Derivatives	0.5	48	Main	100%
2019/Fall	FINA5511	Investments	0.25	20	Main	100%
2019/Summer	ACCT5130	Advanced Finance	0.5	29	Main	100%
2019/Summer	ACCT5130	Advanced Finance	0.5	29	Main	100%
2018/Fall	BUSI3512	Derivatives	0.5	58	Main	100%
2018/Fall	FINA5511	Investments	0.25	40	Main	100%
2018/Fall	BUSI4511	Fixed Income Analysis	0.5	16	Main	100%
2018/Fall	BUSI3512	Derivatives	0.5	46	Main	100%
2018/Summer	ACCT5130	Advanced Finance	0.5	30	Main	100%
2018/Summer	FINA5502	Corporate Finance	0.25	18	Main	100%
2018/Summer	ACCT5130	Advanced Finance	0.5	23	Main	100%
2017/Fall	BUSI4511	Fixed Income Analysis	0.5	29	Main	100%
2017/Fall	BUSI3512	Derivatives	0.5	55	Main	100%
2017/Fall	BUSI3512	Derivatives	0.5	16	Main	100%
2017/Summer	ACCT5130	Advanced Finance	0.5	20	Main	100%
2017/Summer	ACCT5130	Advanced Finance	0.5	21	Main	100%
2017/Winter	FINA5512	Valuation	0.25	28	Shanghai	100%
2017/Winter	FINA5502	Corporate Finance	0.25	33	Main	100%
2017/Winter	FINA5502	Corporate Finance	0.25	34	Main	100%
2017/Winter	BUSI3512	Derivatives	0.5	58	Main	100%
2016/Fall	BUSI4511	Fixed Income Analysis	0.5	27	Main	100%
2016/Fall	BUSI3512	Derivatives	0.5	35	Main	100%
2016/Fall	BUSI3512	Derivatives	0.5	50	Main	100%

2016/Winter	FINA5514	Micro Finance	0.25	33	Shanghai	100%

Service to the institution (Academic)

G. ADMINISTRATIVE RESPONSIBILITIES

Service to the Institution (Administrative)

Carleton University

Faculty Assignments

Chair:

2018-2019: Hiring Committee - Finance Faculty

Credentials

Skills

Languages

English, Ukrainian, Russian, Spanish (intermediate), French (basic)

Curriculum Vitae - Sprott School of Business

Stelios Zyglidopoulos, PhD
Full Professor - Tenured,
Sprott School of Business (Management and Strategy)
Telephone:
Email: szyglidopoulos@gmail.com
AACSB Qualification: Scholarly Academic (SA) , Participation: Participating
OrcID: <https://orcid.org/0000-0003-2087-615X>

A. EDUCATION

Academic Degrees

Doctor of Philosophy. McGill University.
Master of Arts. Homerton College, University of Cambridge.
Master of Arts. Birkbeck College, University of London.
Master of Business Administration. McGill University.
Ptichion. University of Piraeus.

B. EMPLOYMENT

Academic Appointments

Academic Director, Sprott School of Business, Carleton University (July, 2024 - Present), Ottawa, Canada. Academic Director PhD & MSc Programs
Full Professor, Sprott School of Business, Carleton University (2023 - Present), Ottawa, Canada-Ontario.
Associate, Churchill College, University of Cambridge (2017 - Present), Cambridge, United Kingdom.
Associate Fellow, Homerton College, University of Cambridge (2016 - Present), Cambridge, United Kingdom.
Visiting Professor, IE University (2010 - 2023), Madrid, Spain.
Professor, Corporate Social Responsibility, Kedge Business School (2018 - 2022), Luminy, Marseille, France.
Visiting Professor, Desautels Faculty of Management, McGill University (June, 2020 - August, 2020), Montreal, Canada-Quebec.
Reader (Associate Professor) in Management, The Adam Smith Business School, University of Glasgow (2014 - 2018), Glasgow, United Kingdom.
Visiting Academic, Southampton Business School, University of Southampton (2016 - 2017), Southampton, United Kingdom.
Strategy Fellow, Cambridge Judge Business School, University of Cambridge (2014 - 2017), Cambridge, United Kingdom.
Fellow, Homerton College, University of Cambridge (2008 - 2015), Cambridge, United Kingdom.
Visiting Professor, Athens University of Economics and Business (AUEB) (2008 - 2014), Athens, Greece.
University Lecturer, Cambridge Judge Business School, University of Cambridge (2004 - 2014), Cambridge, United Kingdom.
Visiting Professor, Athens Laboratory of Business Administration (ALBA) (2007 - 2008), Athens, Greece.
Assistant Professor, Rochester Institute of Technology (2000 - 2004), Rochester, New York.
Assistant Professor, Erasmus University (1998 - 2000), Rotterdam, Netherlands.

C. PROFESSIONAL HONOURS

2024: Member of the top 2% Stanford world club of the world's top scientists, Stanford.
2023 – 2024: Lifelong Member, Beta Gamma Sigma.
2021: Member of the top 2% Stanford world club of the world's top scientists, Stanford.
2015: Best Papers Proceedings, Annual Meeting of the Academy of Management.

D. PUBLICATIONS

Intellectual Contributions Grid [Last 5 Years]: Years: 2023, 2022, 2021, 2020, 2019

Category	BDS	AIS	TLS	Total
Articles in Peer-Reviewed Journals		14		14

Totals		14	14

Refereed Scholarly Publications

Articles in Refereed Journals

Illia, L., Zyglidopoulos, S., & Bantimaroudis, P. (2024). Staging the Lie: The Impact of Framing and Content on the Visibility of Fake Business News. *Business and Society*. [A]

First published Nov 21, 2024

Ramoglou, S., Zyglidopoulos, S., & Papadopoulou, F. (2023). Is there opportunity without stakeholders? A stakeholder theory critique and development of opportunity-actualization. *Entrepreneurship, Theory and Practice*, 47 (1), 113-141. [A+]

Illia, L., Colleoni, E., & Zyglidopoulos, S. (2023). Ethical Implications of Text Generation in the Age of Artificial Intelligence. *Business Ethics, the Environment & Responsibility*, 32 (1), 201-210. [A,Other]

entered in 2022, volume assigned in 2023

Zyglidopoulos, S., & Lilia, L. (2023). Beyond collective action: Heterogeneous stakeholders influence on firms in the digital age. *Academy of Management Perspectives*. [A]

Fleming, P., Zyglidopoulos, S., Boura, S., & Lioukas, S. (2022). How Corruption is Tolerated in the Greek Public Sector: Toward a Second-Order Theory of Normalization. *Business and Society*, 61 (1), 191-224. [A]

Williamson, P., Symeou, P., & Zyglidopoulos, S. (2022). International Diversification, Legitimacy and Corporate Social Performance of Extractive Industry Multinationals. *Global Strategy Journal*, 12 (2), 359-393. [A]

Colleoni, E., Illia, L., & Zyglidopoulos, S. (2021). Exploring how publics discursively organize as digital collectives: The use of empty and floating signifiers as organizing devices in social media. *Journal of the Association for Consumer Research*, 6 (4), 491-502. [B]

Dieleman, M., Cuervo-Cazurra, A., Rodrigues, S., Hirsch, P., & Zyglidopoulos, S. (2021). Multinationals' Misbehavior. *Journal of World Business*, 56 (5), 101244. [A+]

Hirsch, P., Zyglidopoulos, S., & Alekos, P. (2021). Can a Leader of Moral Character Survive and Do Good in a Corrupt Organization? *Organizational Dynamics*, 50 (3), 1100753. [A]

Zyglidopoulos, S. (2021). More Accountable, More Ethical, Yet Less Trusted: Misplaced Corporate Governance in the Era of Big Data. *British Journal of Management*, 32 (4), 947-968. [A]

Zyglidopoulos, S. (2021). On Becoming and Being an Ethical Leader: A Platonic Interpretation. *Journal of Business Ethics*, 173, 1-11. [A,FT50]

Zyglidopoulos, S., Dieleman, M., & Hirsch, P. (2020). Playing the game: unpacking the rationale for organizational corruption in MNCs. *Journal of Management Inquiry*, 29 (3), 338-349. [A]

Hirsch, P., & Zyglidopoulos, S. (2020). A (comparative) Book review for Thank You for Being Late: An Optimist's Guide to Thriving in the Age of Accelerations by Thomas L. Friedman and The Square and the Tower: Networks, Hierarchies and the Struggle for Global Power by Niall Ferguson. *Organization Studies*. [A+]

Symeou, P., Zyglidopoulos, S., & Gardberg, N. (2019). Corporate environmental performance: Revisiting the role of organizational slack. *Journal of Business Research*, 96, 169-182. [A]

Gardberg, N., Zyglidopoulos, S., Symeou, P., & Schepers, D. (2019). The impact of corporate philanthropy on reputation for corporate social performance. *Business and Society*, 58 (6), 1177-1208. [A]

Symeou, P., Zyglidopoulos, S., & Williamson, P. (2018). Internationalization as a Driver of the Corporate Social Performance of Extractive Industry Firms. *Journal of World Business*, 53 (1), 27-38. [A+]

Zyglidopoulos, S., Hirsch, P., Martin de Holan, P., & Phillips, N. (2017). Expanding research on corporate corruption, management and organizations. *Journal of Management Inquiry*, 26 (3), 247-253. [A]

Zyglidopoulos, S., Williamson, P., & Symeou, P. (2016). The corporate social performance of developing country multinationals. *Business Ethics Quarterly*, 26 (3), 379-406. [A]

Zyglidopoulos, S. (2016). Toward a theory of second-order corruption. *Journal of Management Inquiry*, 25 (1), 3-10. [A]

Ramoglou, S., & Zyglidopoulos, S. (2015). The constructivist view of entrepreneurial opportunities: a critical analysis. *Small Business Economics: An Entrepreneurship Journal*, 44 (1), 71-78. [A]

Symeou, P., Bantimaroudis, P., & Zyglidopoulos, S. (2015). Cultural agenda setting and the role of critics: an empirical examination in the market for art-house films. *Communication Research*, 42 (5), 732-754. [A]

Zakakis, N., Bantimaroudis, P., & Zyglidopoulos, S. (2015). Museum promotion and cultural salience: the agenda of the Athenian Acropolis Museum. *Museum Management and Curatorship*, 30 (4), 342-358. [B]

Bantimaroudis, P., & Zyglidopoulos, S. (2014). Cultural agenda setting: salient attributes in the cultural domain. *Corporate Reputation Review*, 17 (3), 183-194. [C]

Zyglidopoulos, S., Georgiadis, A. P., Carroll, C. E., & Siegel, D. A. (2012). Does media attention drive corporate social responsibility? *Journal of Business Research*, 65 (11), 1622-1627. [A]

Zyglidopoulos, S., Symeou, P., Baltimaroudis, P., & Kampanellou, E. (2011). Cultural agenda setting: media attributes and public attention of Greek museums. *Communication Research*, 20 (10), 1-19. [A]

Zyglidopoulos, S., & Fleming, P. (2011). Corporate accountability and the politics of visibility in 'late modernity'. *Organization: the critical journal of organization, theory and society*, 18 (5), 691–706. [A+]

Baltimaroudis, P., Zyglidopoulos, S., & Symeou, C. (2010). Greek museum media visibility and museum visitation: an exploration of cultural agenda setting. *Journal of Communication*, 60 (4), 743-757. [A]

Articles in Refereed Conference Proceedings

Full Paper

Gardberg, N., Zyglidopoulos, S., & Symeou, P. (2015). "Public trust's duality in the CSP – reputation – financial performance relationship across countries. *Academy of Management*.

Edited Books

Freeman, R. E., Harrison, J. S., & Zyglidopoulos, S. (2018). *Stakeholder Management: Concepts and Strategies* Cambridge University Press.

Chapters in Edited Books

Zyglidopoulos, S., & Fleming, P. (2016). Organizational self-restraint. In Shanna R. Van Slyke (Ed.), *The Oxford Handbook of White-Collar Crime*. Oxford: Oxford University Press. [Status: Published]

Zyglidopoulos, S. (2011). Brent Spar. *The Encyclopedia of Sustainability, Vol. 3: The Law and Politics of Sustainability*. Great Barrington: Berkshire Publishing. [Status: Published]

Zyglidopoulos, S. (2010). Corporate reputation and the news media in Greece. *Corporate Reputation and the News Media: Agenda-setting Within Business News Coverage in Developed, Emerging, and Frontier Markets* (pp. 96–104). New York: Rutledge. [Status: Published]

Other (Non-refereed) Scholarly Publications

Other Publications

Other Publications

2015: Illia, L., Romenti, s., & Zyglidopoulos, S., *How to engage in effective dialogue about corporate social responsibility*. Illia, L., Romenti, S., and Zyglidopoulos, S., 2015. "How to engage in effective dialogue about corporate social responsibility," MIT Sloan Management Review, 57(1): 20–22.

2013: Illia, L., Zyglidopoulos, S., Romenti, S., Rodríguez-Cánovas, B., & del Valle Brena, G. A. *Communicating CSR to a cynical public*. Illia, L., Zyglidopoulos, C. S., Romenti, S., Rodríguez-Cánovas B., and del Valle Brena, G. A., 2013. "Communicating CSR to a cynical public," MIT Sloan Management Review, 54(3): 16–18. Short Video presenting the findings from this article: <https://www.youtube.com/watch?v=cJJKFusni-Y>

E. OTHER SCHOLARLY OR PROFESSIONAL ACTIVITY

Editorial Responsibilities

Editor: Academic PRJ

2023 – 2024: Journal of Business Ethics (International).

2016 – 2021: Journal of Business Ethics (International).

2017: Journal of Management Inquiry (International). Co-editor (with Paul Hirsch, Nelson Phillips, and Pablo Martin de Holan) of a Special Issue of the Journal of Management Inquiry (ABS 3), "Corruption, management and organizations", July 2017.

Editor: Associate Editor

2016 – 2021: Journal of Management Inquiry (International).

2014 – 2016: Academy of Management Conference (International).

Presentations

Other Presentations

Invited Lecture

2024: School of Business - University of Dundee, Research Seminar.

2024: Spratt School of Business 'Meet the editors'.

2024: School of Business - University of Dundee 'Meet the editor'.

Keynote Address

2017: International Research Meeting in Business and Management. Keynote speaker at the 8th International Research Meeting in Business and Management, Nice, France, July 5, 2017.

Presentation

2022: IPAG Business School, Paris, France.

2021: University of London, London, United Kingdom. Birkbeck's Responsible Business Centre, Clore Management Centre, Birkbeck, University of

London, January 15, 2021.

2021: HEC Montreal, Montreal, Canada-Quebec. HEC Montreal, Invited talk on the tolerance of corruption in the Greek public sector, June 22, 2021.

2021: Derby Small Business Conference, Derby, United Kingdom. Derby Small Business Conference 2021, Invited Plenary Session Speaker, Supporting MSMEs through disruption (Covid-19) and beyond, June 28, 2021.

2021: Umeå University, Umeå, Sweden.

2018: University of Southampton. Centre for Inclusive and Sustainable Entrepreneurship and Innovation (CISEI), Southampton Business School, University of Southampton, December 12, 2018.

2016: University of Southampton Business School, Southampton, United Kingdom.

2016: University College Dublin, Dublin, Ireland.

2015: Razak School of Government, Putrajaya, Malaysia.

2014: International Centre for Corporate Social Responsibility, Nottingham, United Kingdom.

2014: Erasmus University Rotterdam, Rotterdam, Netherlands. Past, Present and Future of Reputation Management, 25th Anniversary Corporate Communication Centre, Rotterdam School of Management, Erasmus University Rotterdam, The Netherlands, September 25, 2014.

2013: Cambridge Business Action Network, Cambridge, United Kingdom.

2013: University of London, London, United Kingdom. London Centre for Corporate Governance and Ethics, Birkbeck College, University of London, London, UK, April 5, 2013.

2013: Koc University, Istanbul, Turkey.

2012: Athens Laboratory of Business Administration, Athens, Greece.

2011: University Paris I Panthéon-Sorbonne, Paris, France.

2011: Aegean University, Mytilene, Greece.

Contract or Other Research

Research Grants and Awards

Grants

2024: Zygildopoulos, S. Research Achievement Award (\$15,000.00 Not Funded), Principal Investigator, PRI-Carleton University. [Status: Not Funded]

2023 [Year 1 of 3]: Zygildopoulos, S. International Research Seed Grant, Principal Investigator, PRI-Carleton University. [Status: Not Funded]

Other Professional Activities

Service to the Profession/Offices in learned societies or professional associations

Academic Conference: Moderator / Facilitator

2015 – 2016: European Group for Organizational Studies. Convener for EGOS 2016, sub-theme "Organizational corruption? Expanding the research agenda," Naples, Italy, July 2016. Convener for EGOS 2015, sub-theme 19: "What ancient philosophy has to teach organization studies," Athens, Greece, July 2015.

Board of Directors: Substantial Involvement

2012 – 2014: Homerton College's Steel Pan Band. Treasurer for "Absolute Pandemonium," Homerton College's Steel Pan Band, 2012– 2014.

Invited Lecture

2024: School of Business - University of Dundee, Research Seminar.

2024: Sprott School of Business 'Meet the editors'.

2024: School of Business - University of Dundee 'Meet the editor'.

Keynote Address

2017: International Research Meeting in Business and Management. Keynote speaker at the 8th International Research Meeting in Business and Management, Nice, France, July 5, 2017.

Other Professional Service Activities

2015: Social Sciences and Humanities Research Council of Canada. Reviewer for the Social Sciences and Humanities Research Council of Canada (SSHRC), 2015.

2013 – 2015: University of Cambridge, Cambridge, United Kingdom. Working Group on Risk Management, Homerton College, University of Cambridge, 2013–2015.

2010 – 2015: University of Cambridge, Cambridge, United Kingdom. Audit Committee, Homerton College, University of Cambridge, 2010–2015.

2013 – 2014: University of Cambridge, Cambridge, United Kingdom. Chair of the Teaching and Admissions Committee for the Postgraduate

Diploma in Entrepreneurship, Cambridge Judge Business School, University of Cambridge, 2013–2014.

2010 – 2011: Cambridge Judge Business School, Cambridge, United Kingdom. Director of the Management Studies Tripos Program, Cambridge Judge Business School, 2009–2011.

Reviewer: Conference Paper

2020: Swiss National Science Foundation.

Scholarly Work in Progress

F. ACADEMIC RESPONSIBILITIES (TEACHING)

Teaching Schedule

Term	Course	Course Title	Cr	Enroll	Campus	TR%
2024/Winter	STGY5900	Corporate & Business Strategy	0.5	72	Main	100%
2024/Winter	BUSI6109	Special Topics in Management	0.5	5	Main	100%
2023/Fall	STGY5900	Corporate & Business Strategy	0.5	37	Main	100%
2023/Fall	STGY5900	Corporate & Business Strategy	0.5	15	Main	100%
2023/Fall	STGY5900	Corporate & Business Strategy	0.5	31	Main	100%
2023/Summer	STGY5900	Corporate & Business Strategy	0.5	29	Main	100%
2023/Winter	STGY5900	Corporate & Business Strategy	0.5	7	Main	100%
2023/Winter	BUSI4609	Strategic Management	0.5	38	Main	100%
2023/Winter	BUSI4609	Strategic Management	0.5	40	Main	100%

Service to the institution (Academic)

University Assignments

PhD. Comprehensive Committees:

2019-2020: Ahmad Salman

2015-2016: Eva Goutzamani

University Assignments

PhD. Comprehensive Committees:

2019-2020: Hasnita Ali

University Assignments

PhD. Comprehensive Committees:

2017-2018: Maria Boura

University Assignments

PhD. Comprehensive Committees:

2023-2024: Nikos Zakakis

G. ADMINISTRATIVE RESPONSIBILITIES

H. OTHER

Selected Media Appearances: Online

2022 - Interview with Selma Sondern for the Institute of Intellectual History : On the value of the history of ideas for business ethics: A discussion of Plato's ethics in the modern management context." Interview with Selma Sondern for the Institute of Intellectual History, the University of St. Andrews, March 2022.

2014 - Five reasons why corporates get environmental CSR communications wrong

2014 - "This blood-letting may kill Greece rather than save its life," Financial Times

Credentials

New Program Proposal

Date Submitted: 02/13/24 4:13 pm

Viewing: **TBD-2229 : Bachelor of Accounting Honours**

Last edit: 02/13/24 4:13 pm

Last modified by: mariawalt

[Changes proposed by: mariawalt](#)

In Workflow

1. **BUSI ChairDir UG**
2. **BUS Dean**
3. **BUS FCC**
4. **BUS FBoard**
5. **PRE SCCASP**
6. SCCASP
7. SQAPC
8. Senate
9. PRE CalEditor
10. CalEditor

Approval Path

1. 02/26/24 4:31 pm
Rebecca Renfroe
(rebeccarenfroe):
Approved for BUSI
ChairDir UG
2. 03/05/24 2:17 pm
Rebecca Renfroe
(rebeccarenfroe):
Approved for BUS Dean
3. 03/05/24 2:18 pm
Rebecca Renfroe
(rebeccarenfroe):
Approved for BUS FCC
4. 03/05/24 2:18 pm
Rebecca Renfroe
(rebeccarenfroe):
Approved for BUS FBoard

Effective Date	2025-26
Workflow	majormod
Program Code	TBD-2229
Level	Undergraduate
Faculty	Sprott School of Business
Academic Unit	School of Business
Degree	
Title	Bachelor of Accounting Honours

Program Requirements

Bachelor of Accounting Honours (20.0 credits)

A. Credits Included in the Major CGPA (19.0 credits):

1. 1.5 credits in:		1.5
<u>BUSI 1011</u> [0.0]	Financial Accounting for Business Students	
<u>BUSI 1401</u> [0.5]	Foundations of Information Systems	
<u>BUSI 1800</u> [0.5]	Introduction to Business	
2. 1.0 credit in:		1.0
<u>ECON 1001</u> [0.5]	Introduction to Microeconomics	
<u>ECON 1002</u> [0.5]	Introduction to Macroeconomics	
3. 0.5 credit in:		0.5
<u>MATH 1009</u> [0.5]	Mathematics for Business	
4. 1.0 credit in:		1.0
<u>PSYC 1002</u> [0.5]	Introduction to Psychology II	
<u>SOCI 1005</u> [0.5]	Sociology for Bachelor of Commerce Students	
5. 5.0 credits in:		5.0
<u>BUSI 2011</u> [0.0]	Intermediate Financial Reporting I	
<u>BUSI 2018</u> [0.0]	Managerial Accounting for Business Students	
<u>BUSI 2101</u> [0.5]	Organizational Behaviour	
<u>BUSI 2208</u> [0.5]	Introduction to Marketing	
<u>BUSI 2301</u> [0.5]	Introduction to Supply and Operations Management	
<u>BUSI 2401</u> [0.5]	Introduction to Data Analytics	
<u>BUSI 2501</u> [0.5]	Business Finance	
<u>BUSI 2601</u> [0.5]	Business Law	
<u>BUSI 2701</u> [0.5]	Fundamentals of International Business	
<u>BUSI 2800</u> [0.5]	Entrepreneurship	
6. 0.5 credit in:		0.5
<u>STAT 2601</u> [0.5]	Business Statistics	
7. 4.5 credits in:		4.5
<u>BUSI 3011</u> [0.0]	Intermediate Financial Reporting II	
<u>BUSI 3013</u> [0.0]	Professionalism and Perspectives in Accounting	
<u>BUSI 3014</u> [0.0]	Exploring Sustainability in Accounting	
<u>BUSI 3015</u> [0.0]	Taxation Concepts	
<u>BUSI 3017</u> [0.0]	Auditing Theory	
<u>BUSI 3018</u> [0.0]	Cost Management and Decision Making	
<u>BUSI 3040</u> [0.5]	Data Analytics and Information Systems for Accounting	
<u>BUSI 3102</u> [0.5]	Introduction to Human Resources Management	
<u>BUSI 3103</u> [0.5]	Introduction to Organization Theory	
<u>BUSI 3309</u> [0.5]	Project Management	
8. 2.5 credits from:		2.5
<u>BUSI 4003</u> [0.5]	Accounting: Relevance and Influence	
<u>BUSI 4011</u> [0.0]	Advanced Financial Reporting	

<u>BUSI 4015</u> [0.0]	Advanced Taxation Concepts	
<u>BUSI 4017</u> [0.0]	Advanced Auditing	
<u>BUSI 4018</u> [0.0]	Advanced Cost Management and Decision Making	
9. 1.5 credit in:		1.5
<u>BUSI 4020</u> [0.0]	Accounting Capstone	
<u>BUSI 4601</u> [0.5]	Business Ethics	
<u>BUSI 4609</u> [0.5]	Strategic Management	
10. 1.0 credit in: BUSI at the 4000-level		1.0
11. 0.0 credits in: Business Career Preparation Requirement		
<u>BUSI 1995</u> [0.0]	Employability Passport I	
<u>BUSI 2995</u> [0.0]	Employability Passport II	
<u>BUSI 3995</u> [0.0]	Employability Passport III	
<u>BUSI 4995</u> [0.0]	Employability Passport IV	
B. Credits Not Included in the Major CGPA (1.0 credits):		
12. 1.0 credits in free electives.		1.0
Total Credits		20.0

Notes:

1. [BUSI 4020](#), [BUSI 4601](#), and [BUSI 4609](#) in **Item 9** above must be taken at the Sprott School of Business.
2. The following courses cannot be used as free electives toward the B.Com. degree: [ESLA 1300](#), [ESLA 1500](#), and any 0000-level course such as [MATH 0009](#) and [MATH 0107](#).
3. The 4000-level credit in **Item 9** above must be taken at the Sprott School of Business.
4. Students require completion of [BUSI 1800](#) and [BUSI 2800](#) to be eligible for registration in BUSI 3102, BUSI 3103, and BUSI 3309.
5. Students require completion of [BUSI 1995](#) to be eligible for registration in [BUSI 2101](#), completion of [BUSI 2995](#) to be eligible for registration in [BUSI 3309](#), and completion of [BUSI 3995](#) to be eligible for registration in [BUSI 4609](#) ([BUSI 4709](#) for B.Com. with concentration in International Business students). [BUSI 4995](#) must be completed as part of the degree requirements prior to graduation from the Bachelor of Commerce.

New Resources	No New Resources
Summary	New BCom pathway to Bachelor of Accounting
Rationale	New pathway responding to demand for advanced competencies in Accounting.
Transition/Implementation	Admission as of Fall 2025

Program reviewer
comments

New Course Proposal

Date Submitted: 02/08/24 5:07 pm

Viewing: **BUSI 4020 : Accounting Capstone**

Last edit: 03/14/24 9:20 am

Changes proposed by: mariawalt

Calendar Pages
referencing this
course

Business
Business (BUSI)

Programs referencing
this course

Bachelor of Accounting Honours
Concentration in Accounting

In Workflow

1. **BUSI ChairDir UG**
2. **BUS FCC**
3. **BUS FBoard**
4. **PRE SCCASP**
5. SCCASP
6. SQAPC
7. Senate
8. PRE CalEditor
9. Banner

Approval Path

1. 02/08/24 3:27 pm
Natalie Phelan
(nataliephelan): Rollback
to Initiator
2. 02/26/24 4:32 pm
Rebecca Renfro
(rebeccarenfro):
Approved for BUSI
ChairDir UG
3. 02/26/24 4:33 pm
Rebecca Renfro
(rebeccarenfro):
Approved for BUS FCC
4. 02/26/24 4:34 pm
Rebecca Renfro
(rebeccarenfro):
Approved for BUS FBoard

Effective Date	2025-26
Workflow	majormod
New Resources	No New Resources
Level	Undergraduate
Course Code	BUSI
Course Number	4020
Title	Accounting Capstone
Title (short)	Accounting Capstone
Faculty	Sprott School of Business

Academic Unit	School of Business
Credit Value	0.50
Special/Selected Topics	Not Applicable
Significant Experiential Learning	None
Course Description	Integration of a variety of accounting disciplines.
Prerequisite(s)	BUSI 3011, BUSI 3015, BUSI 3017, BUSI 3018, and BUSI 3040 (with a grade of C- or better in each)
Class Format	Lectures three hours a week
Precluded Courses	
Also listed as	
Piggybacked Courses	
Grade Mode	Satisfactory/Unsatisfactory
Schedule Type	Lecture
	*May constitute a major modification under Carleton's IQAP. Please consult https://carleton.ca/viceprovost/major-minor-modifications/ for more details.
Unpaid Placement	No
Summary	Assoc with NP BAcc. New Accounting course.
Rationale for new course	The course content of all accounting courses had to be adapted to meet the requirements of the new CPA Canada Competency.
Course reviewer comments	nataliephelan (12/19/23 11:33 am): Per M. Walt, move to future cycle for 25-26. nataliephelan (02/08/24 3:27 pm): Rollback: As requested nataliephelan (03/14/24 9:20 am): Per C. Noja, changed to majormod workflow as this is a capstone.

BAcc Associated Minor mods:

BUSI1011	Financial Accounting for Business Students
BUSI2011	Intermediate Financial Reporting I
BUSI 2018	Managerial Accounting for Business Students
BUSI3011	Intermediate Financial Reporting II
BUSI3013	Professionalism and Perspectives in Accounting
BUSI3014	Exploring Sustainability in Accounting
BUSI3015	Taxation Concepts
BUSI3017	Auditing Theory
BUSI3018	Cost Management and Decision Making
BUSI4011	Advanced Financial Reporting
BUSI4015	Advanced Taxation Concepts
BUSI4017	Advanced Auditing
BUSI4018	Advanced Cost Management and Decision Making

Program Change Request

Date Submitted: 01/07/25 2:28 pm

Viewing: **BACC-UAC : Bachelor of Accounting Honours**

Last approved: 12/20/24 10:41 am

Last edit: 01/07/25 2:28 pm

Last modified by: mariawalt

Changes proposed by: mariawalt

In Workflow

- 1. BUSI ChairDir UG
- 2. BUS FCC
- 3. BUS FBoard
- 4. PRE SQAPC
- 5. PRE SCCASP
- 6. SCCASP
- 7. PRE CalEditor
- 8. CalEditor

Approval Path

- 1. 01/07/25 2:31 pm
Rebecca Renfroe
(rebeccarenfroe):
Approved for BUSI
ChairDir UG
- 2. 01/07/25 2:34 pm
Rebecca Renfroe
(rebeccarenfroe):
Approved for BUS FCC
- 3. 01/07/25 2:35 pm
Rebecca Renfroe
(rebeccarenfroe):
Approved for BUS FBoard

History

- 1. Dec 20, 2024 by Maria
Walt (mariawalt)

Effective Date	2025-26
Workflow	<u>minormod</u> ~~majormod~~
Program Code	BACC-UAC
Level	Undergraduate
Faculty	Sprott School of Business
Academic Unit	School of Business
Degree	

Program Requirements

Bachelor of Accounting Honours (20.0 credits)

A. Credits Included in the Major CGPA (18.5 credits):

1. 1.5 credits in:		1.5
BUSI 1011 [0.0]	Financial Accounting for Business Students	
BUSI 1401 [0.5]	Foundations of Information Systems	
BUSI 1800 [0.5]	Introduction to Business	
2. 1.0 credit in:		1.0
ECON 1001 [0.5]	Introduction to Microeconomics	
ECON 1002 [0.5]	Introduction to Macroeconomics	
3. 0.5 credit in:		0.5
MATH 1009 [0.5]	Mathematics for Business	
4. 1.0 credit in:		1.0
PSYC 1002 [0.5]	Introduction to Psychology II	
SOCI 1005 [0.5]	Sociology for Bachelor of Commerce Students	
5. 5.0 credits in:		5.0
BUSI 2011 [0.0]	Intermediate Financial Reporting I	
BUSI 2018 [0.0]	Managerial Accounting for Business Students	
BUSI 2101 [0.5]	Organizational Behaviour	
BUSI 2208 [0.5]	Introduction to Marketing	
BUSI 2301 [0.5]	Introduction to Supply and Operations Management	
BUSI 2401 [0.5]	Introduction to Data Analytics	
BUSI 2501 [0.5]	Business Finance	
BUSI 2601 [0.5]	Business Law	
BUSI 2701 [0.5]	Fundamentals of International Business	
BUSI 2800 [0.5]	Entrepreneurship	
6. 0.5 credit in:		0.5
STAT 2601 [0.5]	Business Statistics	
7. 4.5 credits in:		4.5
7. 4.0 credits in:		4.0
BUSI 3011 [0.0]	Intermediate Financial Reporting II	
BUSI 3013 [0.25]	Professionalism and Perspectives in Accounting	
BUSI 3014 [0.25]	Exploring Sustainability in Accounting	
BUSI 3015 [0.0]	Taxation Concepts	
BUSI 3017 [0.5]	Auditing Theory	
BUSI 3018 [0.0]	Cost Management and Decision Making	
BUSI 3040 [0.5]	Data Analytics and Information Systems for Accounting	
BUSI 3102 [0.5]	Introduction to Human Resources Management	
~~BUSI 3103 [0.5]~~	~~Introduction to Organization Theory~~	

BUSI 3309 [0.5]	Project Management	
8. 2.5 credits in:		2.5
BUSI 4003 [0.5]	Accounting: Relevance and Influence	
BUSI 4011 [0.0]	Advanced Financial Reporting	
BUSI 4015 [0.0]	Advanced Taxation Concepts	
BUSI 4017 [0.5]	Advanced Auditing	
BUSI 4018 [0.0]	Advanced Cost Management and Decision Making	
9. 1.5 credit in:		1.5
BUSI 4020 [0.5]	Accounting Capstone	
BUSI 4601 [0.5]	Business Ethics	
BUSI 4609 [0.5]	Strategic Management	
10. 1.0 credit in: BUSI at the 4000-level		1.0
11. 0.0 credits in: Business Career Preparation Requirement		
BUSI 1995 [0.0]	Employability Passport I	
~~BUSI 2995 [0.0]~~	~~Course BUSI 2995 Not Found~~	
BUSI 3995 [0.0]	Employability Passport II	
~~BUSI 4995 [0.0]~~	~~Course BUSI 4995 Not Found~~	
B. Credits Not Included in the Major CGPA (1.5 credits):		
~~12. 1.0 credits in free electives:~~		~~1.0~~
<u>12. 1.5 credits in free electives.</u>		<u>1.5</u>
Total Credits		20.0

Notes:

- [BUSI 4020](#), [BUSI 4601](#), and [BUSI 4609](#) in **Item 9** above must be taken at the Sprott School of Business.
- The following courses cannot be used as free electives toward the B.Acc. degree: [ESLA 1300](#), [ESLA 1500](#), and any 0000-level course such as [MATH 0009](#) and [MATH 0107](#).
- The 4000-level credit in **Item 10** above must be taken at the Sprott School of Business.
- Students require completion of [BUSI 1800](#) and [BUSI 2800](#) to be eligible for registration in BUSI ~~[3102](#)~~ [3102](#), ~~[BUSI 3103](#)~~, and BUSI 3309.
- Students require completion of [BUSI 1995](#) to be eligible for registration in BUSI 3309. BUSI 3995 must ~~registration in BUSI 2101, completion of BUSI 2995 to be~~ completed as part of the degree requirements prior to graduation from the Bachelor of Accounting. ~~eligible for registration in BUSI 3309, and completion of BUSI 3995 to be eligible for registration in BUSI 4609 (BUSI 4709 for B.Com.~~

~~with concentration in International Business students). [BUSI 4995](#) must be completed as part of the degree requirements prior to graduation from the Bachelor of Commerce.~~

New Resources	No New Resources
Summary	- removed BUSI 3103 from Major - reducing Major requirement by 0.5 cr and increasing the Free Electives by 0.5 cr, resulting in change to Note 4 - updated Employability Requirement - removed BUSI 2995 and BUSI 4995 from the Major. Also resulting in an update to Note 5 with the adjusted progression requirement.
Rationale for change	- BUSI 3103 will continue to be offered as an elective, in alignment with changes in business education. - employability passport content streamlined with a focus on career management to be offered in two courses - BUSI 1995 is completed within the first two years, and BUSI 3995 for program completion.
Transition/Implementation	n/a - change will be reflected starting with the first cohort.

Program reviewer
comments

Key: 2229