

James W. Carland, Jr.

CURRICULUM VITA

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EDUCATION

PhD	6/82	University of Georgia
		Major: Management Policy and Systems
		Related Fields: Accounting and Finance
		Supporting Field: Economics
		Research Methodology: Econometrics
		Dissertation: Entrepreneurship
MBA	8/77	Western Carolina University
BA	6/68	University of North Carolina at Asheville, Major: Mathematics

PROFESSIONAL CERTIFICATIONS

CMA	12/77-12/02	Certified Management Accountant (Number 840)
	Inactive	Institute of Management Accounting
CPA	5/80-12/02	Certified Public Accountant (Number 12700)
	Inactive	N.C. Board of Certified Public Accountants
CVA	10/96-10/99	Certified Valuation Analyst (Number 96211)
	Inactive	National Association of Certified Valuation Analysts

EMPLOYMENT HISTORY

8/78-1/80	Account Executive, Small Business Development Center, Athens, GA
6/72-9/77	Managing Consultant for Accounting & MIS (Active in more than 300 cases)
6/75-9/77	Bank of America, Asheville, North Carolina
6/76	Manager, Commercial Loan Administration
6/75	Elected Assistant Vice President
1/75-6/75	Elected Assistant Secretary & Commercial Loan Administrator
6/73-12/74	Commercial Loan Trainee
2/73-6/73	Manager, Dealer Loan Department
11/72-2/73	Assistant Manager, Dealer Loan Department
7/72-11/72	Branch Bank Manager
6/72-7/72	Consumer Loan Officer and Collection Agent
1/72-6/72	Management Trainee
7/71-1/72	Sales Representative, John Hancock Life Insurance Company, Raleigh, NC
9/68-7/71	Sales Representative, Reserve Life Insurance Company, Raleigh, NC
	Service in the United States Marine Corps
	Viet Nam Veteran, Honorably Discharged with the rank of Captain

ACADEMIC HISTORY

1/08-Present	Carland College, Asheville, NC Co-President and Professor of Entrepreneurship
8/82-6/07	Western Carolina University, Cullowhee, NC
8/98-6/07	Professor of Entrepreneurship
7/95-8/98	Professor of Accountancy
7/88-6/95	Associate Professor of Accountancy
8/82-6/88	Assistant Professor of Accountancy
9/80-12/80	Lecturer in Management Policy, University of Georgia, Athens, GA
1/80-6/80	Adjunct Faculty in Accounting, Athens Technical Institute, Athens, GA
9/77-6/78	Instructor in Accounting & Computer Information Systems Western Carolina University, Cullowhee, NC
1/77-8/77	Lecturer in Accounting and Finance Western Carolina University, Cullowhee, NC
9/72-12/77	Adjunct Faculty in Mathematics, Finance & Business Asheville-Buncombe Technical Institute, Asheville, NC

ENTREPRENEURSHIP HISTORY

1/80-2/82	<i>The Management Accountability Group, Inc.:</i> was a corporation co-founded in Athens, GA, by J.A. Carland, J.W. Carland, and two partners. The firm retailed microcomputer hardware and software, designed and developed software and performed custom programming. The Carlands were responsible for software, one partner for marketing, and the second partner for hardware. Prior to 2/82, the Carlands developed and the firm marketed 10 major software systems, including the first, fully integrated accounting system in the United States. Each of the systems were designed to minimize accounting errors and opportunities for fraud, both issues of major concern in microcomputer software at the time. Sales volume in 1980 was \$180,000 and in 1981 national sales volume was \$2 million. In February, 1982, the Carlands sold their interest in the firm to the other owners.
2/82-12/06	<i>The Carland Group, Inc.:</i> was a corporation co-founded by J.A. Carland and J.W. Carland, originally named Carland & Associates, Inc. The firm originally specialized in the design and development of general purpose software systems. The company designed, developed and marketed two major, general purpose software systems and

consulted with numerous clients on microcomputer systems, security, fraud prevention, and other managerial topics. In August, 1982, the Carlands moved to Cullowhee, and reduced their involvement in the firm to a part time basis. They shifted the emphasis to consulting. Over the years, the firm's emphasis gradually changed, moving increasingly toward business valuation, security and fraud prevention and detection, although it continued to be involved in a number of information systems security engagements. These areas of activity ceased with the establishment of two of the firms listed below: Forensic Investigations, and Carland Consulting. At the end of 2006, the Carlands shifted the remaining activities into a new limited liability company.

- 8/94-3/96 *The International Academy for Case Studies, Inc.:* was a not for profit corporation co-founded by J.A. Carland and J.W. Carland. The organization publishes a *journal* and sponsors two conferences per year. Its purpose is to encourage and support the case method of teaching in higher education throughout the world. The *Journal of the International Academy for Case Studies* has become one of the best known journals involved in case publishing in the United States. This company was subsumed into the Allied Academies, described below.
- 8/94-3/96 *The Academy of Entrepreneurship, Inc.:* was a not for profit corporation co-founded by J.A. Carland and J.W. Carland. The organization publishes four *journals* and sponsors two conferences per year. Its purpose is to encourage and support the study and practice of entrepreneurship throughout the world. The Academy has gained international recognition. This company was subsumed into the Allied Academies, described below.
- 3/96-Present *The Allied Academies, Inc.:* is a not for profit corporation co-founded by J.A. Carland and J.W. Carland. The organization sponsors three conferences per year featuring meetings of its member academies, each of which specializes in a specific discipline area. Adding in the Academy of Entrepreneurship and the International Academy for Case Studies, the organization now fields 17 different journals, each of which is recognized by *Cabell's Directory of Publishing*, and each of which is included in the ProQuest and EBSCO databases, the standard for recognition of a scholarly journal. The purpose of the organization is to encourage and support research in various academic disciplines throughout the world. The organization is now attracting more than 300 people annually to its conferences from all over the United States and from more than a dozen nations. Its publication volume now exceeds 17,000 pages of journal articles each year. Its web address, www.alliedacademies.org, displays

historic copies of its publications and newsletters, as well as its background and mission. The Carlands continue to operate the company on a part time basis. Their elder son, James W. (Trey) Carland, III, is Executive Director of the firm, and works full time in that capacity.

- 8/97-6/04 *Forensic Investigations, Inc.:* is a private investigation firm co-founded by J.A. Carland, J.W. Carland, and their younger son, Jason W. Carland. The firm is licensed by the North Carolina Private Protective Security Board as a private investigation firm. The firm specializes in fraud prevention, fraud detection, fraud investigation, and white collar crime. The establishment of this firm was the culmination of the interest in fraud and security matters which the Carlands have experienced over the years. The firm assumed all responsibility for fraud investigation and detection from Carland Group. At its outset, the firm employed six licensed private investigators. In June, 2004, the Carlands turned over ownership and control to Jason. He continues to operate the firm today.
- 11/97-12/02 *Carland Consulting, PC:* was a professional corporation co-founded by J.A. Carland and J.W. Carland. The organization was a licensed accounting firm which specialized in litigation support and business valuations. The firm was regulated by the North Carolina Board of Certified Public Accountants. The firm specialized in business valuations, appraisals and litigation support issues, but was also active in security and fraud prevention counseling, although it referred investigations to Forensic Investigations. In December, 2002, the Carlands closed the business to pursue other activities.
- 5/98-Present *The DreamCatcher Group, Inc.:* is a corporation co-founded by J.A. Carland and J.W. Carland. The firm specializes in preparing business plans and financing proposals, and consulting with firms in a start-up, acquisition, or expansion mode. The firm also negotiates on behalf of clients with current and prospective lenders. In its first year of operations, the firm successfully negotiated for \$5 million in debt capital for clients previously unsuccessful in obtaining financing, and it has produced dozens of business plans, and been involved with raising millions in capital in the years following. The Carlands continue to operate the business on a part time basis.
- 1/00-Present Starting in 2000 and continuing to the present, the Carlands have played minor roles in the development of a number of ventures. These include two different movie production companies. The Carlands continue to be involved in both ventures, one of which expects to see its first feature film appear in 2008. Three other ventures

involved former students. The Carlands continue to be involved with one of those companies which is poised for significant growth.

The Carlands owned and operated two different proprietorships during this period which were used to own real and depreciable assets which were leased to corporations which they owned. These two proprietorships have now been subsumed into two LLCs which the Carlands have started. One LLC holds intellectual property, including the 17 journals which the Carlands started as part of the Allied Academies operation. The other LLC holds real and tangible property.

- 8/01-12/04 *Whitney Press, Inc.*: is a corporation co-founded by J.A. Carland and J.W. Carland. The firm is a publishing and printing company. It prints and binds all of the journals for the Allied Academies. It also prints journals for a number of other academic organizations. The firm also publishes textbooks, including the printing and binding, which the Carlands have written. In 2004, the Carlands turned over ownership and control to their younger son, Jason. He continues to operate the company on a full time basis.
- 5/03-3/05 *Novascan, Inc.*: was a corporation co-founded by J.A. Carland and J.W. Carland and two other partners. The firm designed a tracking system for luggage in the airline industry. The firm applied for a patent on the system, which utilized hand held scanning devices, and cellular communications. The company employed three full time programmers to develop the system and succeeded in making a major sale of the system to a client. Problems in implementation of the communications ensued and led to the company's closing.
- 2/04-3/05 *CCCH, LLC*: was a limited liability company co-founded by J.A. Carland and J.W. Carland and two other partners to hold the patent discussed in the Novascan story, above. The company was dissolved when Novascan was closed.
- 1/08-Present *Carland College, Inc.*: is licensed by the State of North Carolina to grant the Bachelor of Science in Entrepreneurship, and the Master of Entrepreneurship degrees. The college was co-founded by J.A. Carland and J.W. Carland and operates as an online university specializing in adult learners interested in entrepreneurship. It is the first specialty university focusing exclusively on entrepreneurship in the world.

RESEARCH AND PUBLICATIONS

CITATIONS

Citations of one's publications are an indication of the contribution which one's research has made to the discipline as measured by other scholars. Harzing's *Publish or Perish* identifies more than 1,000 citations of our work based on more than 70 articles and calculates Hirsch's h-index as 14, and Egghe's g-index as 32. *Google Scholar* also identifies more than 1,000 citations. Both sources underestimate our citations as a number of our journal articles and the majority of our proceedings are not included in the calculations. In a 1997 article by Ratnatunga and Romano, "A Citation Classics Analysis of Articles in Contemporary Small Enterprise Research," which appeared in the *Journal of Business Venturing*, 12, 1997, we were noted as the most frequently cited authors in the world in leading entrepreneurship journals during the period 1975 through 1992.

BOOKS

The Management Information System. Athens, GA: The Small Business Development Center, 1980. (With W. Dodge).

Small Business Management: Tools for Success. Boston: PWS Kent, 1990. (With J.A. Carland).

Instructor's Resource Manual for Small Business Management. Boston: PWS Kent, 1990. (With J.A. Carland).

Software Tools for Small Business Management. Boston: PWS Kent, 1990. (With J.A. Carland) (Spreadsheet Templates and Instructions for Cost-Volume-Profit, Budgeting & Financial Analysis).

Small Business Management: Tools for Success, Second Edition. Houston: Dame Publications, Inc., 1998. (With J.A. Carland).

Instructor's Manual for Small Business Management: Tools for Success, Second Edition. Houston: Dame Publications, Inc., 1998. (With J.A. Carland).

Test Bank for Small Business Management: Tools for Success, Second Edition. Houston: Dame Publications, Inc., 1998. (With J.A. Carland).

Readings in Entrepreneurship Research. Cullowhee, NC: Whitney Press, Inc., 2002. (With J. A. Carland).

Catching the American Dream: New Venture Creation. Cullowhee, NC: Whitney Press, Inc., 2002. (With J. A. Carland).

Catching the American Dream: New Venture Creation Workbook. Cullowhee, NC: Whitney Press, Inc., 2002. (With J. A. Carland).

Catching the American Dream: New Venture Creation. CD Spreadsheet Template. Cullowhee: Whitney Press, Inc., 2002. (With J. A. Carland).

Catching the American Dream: New Venture Growth. Cullowhee, NC: Whitney Press, Inc., 2002. (With J. A. Carland).

Catching the American Dream: New Venture Growth Workbook. Cullowhee, NC: Whitney Press, Inc., 2002. (With J. A. Carland).

Catching the American Dream: Entrepreneurial Vision, Strategy and Structure. Cullowhee, NC: Whitney Press, Inc., 2003. (With J. A. Carland).

Catching the American Dream: Entrepreneurial Tools. Cullowhee, NC: Whitney Press, Inc., 2003. (With J. A. Carland).

Dare to Dream Series: Entrepreneurial Planning, Cullowhee, NC: Whitney Press, Inc., 2004. (With J.A. Carland).

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Dare to Dream Series: New Venture Growth, (Second Edition), Cullowhee, NC: Whitney Press, Inc., 2004. (With J.A. Carland).

Dare to Dream Series: Mezzanine Funding, Cullowhee, NC: Whitney Press, Inc., 2004. (With J.A. Carland).

Catching the American Dream Series: Entrepreneurial Accounting, Cullowhee, NC: Whitney Press, Inc., 2004. (With J.A. Carland).

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Catching the American Dream Series: New Venture Funding, Cullowhee, NC: Whitney Press, Inc., 2005. (With J.A. Carland).

Catching the American Dream Series: Intellectual Capital Student Manual, Cullowhee, NC: Whitney Press, Inc., 2005. (With J. A. Carland).

Catching the American Dream Series: Entrepreneurial Finance, Cullowhee, NC: Whitney Press, Inc., 2005 (With J. A. Carland).

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BOOK CHAPTERS

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The Search for the Lead Entrepreneur: Identification Through the Measurement of Entrepreneurial Drive and Skills. *Frontiers of Entrepreneurship Research 1998*, P. Reynolds, W. Bygrave, N. Carter, S. Manigart, C. Mason, G. Myer & K. Shaver (Eds.), Babson Park, MA: Arthur M. Blank Center for Entrepreneurship, 1998, 331-342 (With J.A. Carland & M.D. Ensley).

Differentiating Entrepreneurs from Small Business Owners: A Conceptualization. *Advances in Entrepreneurship* (Ed. Paul Westhead and Mike Wright), Cheltenham, United Kingdom: Edward Elgar Publishing Limited, 2000, 17-21. (With J.A. Carland, F. Hoy, and W.R. Boulton).

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Entrepreneurship Education: An Integrated Approach Using an Experiential Learning Paradigm. *Entrepreneurship Education: A Global View* (Eds. Robert Brockhaus, Gerald Hills, Heinz Klandt & Harold Welsch), London, England: Ashgate Publishing Limited, 2001, 94-103 (With J. A. Carland).

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"Who is an Entrepreneur?" is a Question Worth Asking. *Entrepreneurship: Critical Perspectives on Business and Management*, (Ed. Norris Kreuger), London, United Kingdom: Routledge, December 2002, Chapter 37. (With J.A. Carland, F. Hoy, and W.R. Boulton).

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International Academy for Case Studies Proceedings, Volume 1, October 1994, Myrtle Beach, SC: International Academy for Case Studies (With J.A. Carland).

International Academy for Case Studies Proceedings, Volume 2, October 1995, Nassau, the Bahamas: International Academy for Case Studies (With J.A. Carland).

International Academy for Case Studies Proceedings, Volume 3, October 1996, Maui, HI: International Academy for Case Studies (With J.A. Carland).

International Academy for Case Studies Proceedings, Volume 4, Number 1, April, 1997, Las Vegas, NV: International Academy for Case Studies (With J.A. Carland).

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An Empirical Investigation into the Role of Professionals in the Business Environment. Presented to the Southeastern Division of The Institute of Management Science, Myrtle Beach, SC, October, 1992. Published in Peter B. Barr (Ed.) *Proceedings*, Myrtle Beach: Twenty-eighth Annual Meeting of The Institute of Management Sciences Southeastern Chapter, 373-376. (With J.A. Carland & C.D. Aby).

Management Education: Investigation and Implications. Presented to the Southeastern Division of The Institute of Management Science, Myrtle Beach, SC, October, 1992. Published in Peter B. Barr (Ed.) *Proceedings*, Myrtle Beach, SC: The Institute of Management Sciences Southeastern Chapter, 479-482. (With J.A. Carland & J.L. Dye).

The Death of a Dream: A Case Study. Presented to the North American Case Research Association, New Orleans, LA, November, 1992. Abstracted in R.M. Kinnunen (Ed.), *Proceedings*, Boston, MA: NACRA, 6, 3. (With J.A. Carland & R.G. Crepeau).

Toward the Resurgence of Entrepreneurship in Eastern Europe and Russia: A Public Policy Perspective. Presented to the Association for Global Business, New Orleans, November, 1992. Published in T.I. Kindel (Ed.) *Proceedings*, New Orleans: Association of Global Business, 1992. 336-345. (With J.A. Carland & G.F. Young).

Regulatory and Accounting Problems in Global Securities Markets. Presented to the Association for Global Business, New Orleans, November, 1992. Abstracted in T.I. Kindel (Ed.) *Proceedings*, New Orleans: Association of Global Business, 1992, 203. (With J.L. Dye).

Manufacturing Location and Performance: An Empirical Assessment of Linkage. Presented to the Southeastern Region of Decision Sciences Institute, Chattanooga, TN, February, 1993. Published in K. Fitzpatrick & M.J. McCracken (Eds.), *Proceedings*, Chattanooga: Southeastern Region of Decision Sciences Institute, 100-101. (With J.A. Carland & J. Pearce).

Beware the Dark Side of Total Quality Management. Presented to the Southeastern Region of Decision Sciences Institute, Chattanooga, TN, February, 1993. Published in K. Fitzpatrick & M.J. McCracken (Eds.), *Proceedings*, Chattanooga, TN: Southeastern Region of Decision Sciences Institute, 281-283. (With J.A. Carland & R.C. Higgs).

Beware the Dark Side of Entrepreneurship: Disincentives and Nostra. Presented to the Babson College Entrepreneurship Research Conference, Houston, TX, March, 1993. Abstracted in *Frontiers of Entrepreneurship Research*, 1993, 253. (With J.A. Carland).

Entrepreneurship as an Economic Change Agent: Saviour or Destroyer? Presented to the International Council for Small Business, Las Vegas, NV, June, 1993. Published in J.S. Devlin & M.M. Trevino (Eds.), *Proceedings*, Las Vegas: International Council of Small Business, 288. (With J.A. Carland).

Entrepreneurship Curriculum Design in Developing and Changing Nations: Problems in Following the U.S. Model. Presented to the International Council for Small Business, Las Vegas, NV, June, 1993. Published in J.S. Devlin & M.M. Trevino (Eds.), *Proceedings*, Las Vegas: International Council of Small Business, 243-253. (With J.A. Carland).

Lack of Accounting in MBA Curricula May be Students' Loss. Presented to the Association of Management, Atlanta, GA, August, 1993. Published in W.A. Hamel (Ed.), *Education Proceedings, 11(1)*, Atlanta: Association of Management, 86. (With J.A. Carland & J.L. Dye).

The Impact of Nationalized Health Care on the Financial Position of U.S. Firms. Presented to the Association of Management, Atlanta, GA, August, 1993. Published in W.A. Hamel (Ed.), *Business Management Proceedings, 11(1)*, Atlanta: Association of Management, 82. (With J.L. Dye).

Management Paradigms: A Strategic Restraint. Presented to the Association of Management, Atlanta, GA, August, 1993. Published in W.A. Hamel (Ed.), *Multi-Disciplinary Proceedings, 11(1)*, Atlanta: Association of Management, 155-158. (With J.A. Carland & R.C. Higgs).

Effects of International Competition on SBU Performance. Presented to the Association of Management, Atlanta, GA, August, 1993. Published in W.A. Hamel (Ed.), *Business Management Proceedings, 11(1)*, Atlanta: Association of Management, 130-134. (With J.A. Carland, J. Pearce & J. Stiles).

Student Performance in Management: Is It a Function of Learning? Presented to the Southeastern Chapter of The Institute of Management Science, October, 1993, Myrtle Beach, SC. Published in R.T. Barrett (Ed.), *Proceedings, SETIMS, 1993*, 289-291. (With J.A. Carland & R.C. Higgs).

The Dark Side of Total Quality Management: An Opportunity for Small Business. Published in R.D. Russell (Ed.) *Proceedings, United States Association for Small Business and Entrepreneurship, 1993*, 32-38. (With J.A. Carland).

Entrepreneurship: An Economic Phoenix. Presented to the United States Association for Small Business and Entrepreneurship, October, 1993, Baltimore, MD. Published in R.D. Russell (Ed.) *Proceedings, USASBE, 1993*, 24-31. (With J.A. Carland).

Entrepreneurial Activity in Large Corporations: The Only Competitive Advantage in a Global Marketplace. Presented to the Academy of Business Administration, December, 1993, Nassau, The Bahamas. Published in D.L. Moore and S.G. Amin (Eds.) *Global Business: Theory and Practice*, 211-218. (With J.A. Carland).

Ethical Issues in Business: What Role in a Global Economy? A Classroom Simulation. Presented to the Academy of Business Administration, December, 1993, Nassau, The Bahamas. Published in D.L. Moore and S.G. Amin (Eds.) *Global Business: Theory and Practice*, 34-40. (With J.A. Carland).

Innovation: The Hallmark of Entrepreneurship. *The Art and Science of Entrepreneurship: Volume II*, February 1994, 323-335. (With J.A. Carland).

Expanding the Role of Entrepreneurial Education: The Indonesian Connection. Presented to the Small Business Institute Directors' Association, San Antonio, March, 1994. Published in the *Proceedings*, 110-115. (With J.A. Carland & W.S. Ciptono).

Uncle Sam Needs a Few Good Accountants. Presented to the Southwest Decision Sciences Institute, Dallas, March, 1994. Published in K.T. Mehta (Ed.) *Proceedings*, SWDSI, 1994, 128-130. (With J.A. Carland & W.L. Boyd).

Small Businesses Get Small Benefit from New Tax Law. Presented to the Western Decision Sciences Institute, March, 1994, Maui, HI. Abstracted in A.S. Khade and R.B. Brown (Eds.) *Proceedings*, Stanislaus, CA: California State University and the Western Decision Sciences Institute, 1994, 881. (With J.A. Carland & J.L. Dye).

Tax Deferred Retirement Plans in Periods of Rising Rates: Save Now, Lose Later? Presented to Association of Management, August, 1994, Dallas, TX. Abstracted in A.D. Schiff (Ed.) *Proceedings*, Baltimore, MD: University of Baltimore, 1994, 20. (With J.L. Dye).

The Management of Business Technology and Intellectual Capital: Are We Losing Our Minds? Presented to Association of Management, August, 1994, Dallas, TX. Abstracted in A.D. Schiff (Ed.) *Proceedings*, Baltimore, MD: University of Baltimore, 1994, 134. (With J.A. Carland & J.L. Dye).

Innovative Education: Oxymoron or Requisite? Presented to the Southeastern Chapter of The Institute of Management Science, Myrtle Beach, SC, October, 1994, and published in the *Proceedings*, 122-124. (With J.A. Carland & J.W. Carland, III).

The Book Store Presented to the International Academy for Case Studies, Myrtle Beach, SC, October, 1994 and abstracted in the *Proceedings*, p. 27. (With J.A. Carland & R.L. Lorentz).

Computer Information Systems Education: A Study of the Higher Colleges of Technology in the United Arab Emirates. Presented to the International Academy of Business Administration, Cancun, Mexico, December, 1994 and published in the *Proceedings*, April, 1995, 355-361. (With J.A. Carland & L.N. Garrett).

A Model of Entrepreneurship: The Process of Venture Creation. Presented to the Small Business Institute Directors' Association, Nashville, TN, February, 1995, and published in the *Proceedings*, p. 13-19. (With J.A. Carland & J.W. Carland, III).

Seeing What's Not There: The Enigma of Entrepreneurship, Presented to the Small Business Institute Directors' Association, San Diego, CA, February, 1996 and published in the *Proceedings*, 3-14. (With J.A. Carland & W.H. Stewart).

The Theoretical Bases and Dimensionality of the Carland Entrepreneurship Index. Presented to the RISE conference, and published in the *Proceedings of the RISE '96 Conference*, University of Jyväskylä, Finland, pp. 1-24. (With J.A. Carland).

Sex Differences between Finnish and American Entrepreneurs. Presented to the RISE conference, and published in the *Proceedings of the RISE '96 Conference*, University of Jyväskylä, Finland, (With J.A. Carland).

Using Innovation Techniques in the Teaching of Research and Development and Design Concepts: The Role of Cognition, Presented to Decision Sciences Institute, Orlando, FL, November, 1996, and published in the *Proceedings*, p. 901. (With J.A. Carland & S. Pascale).

A Model of Potential Entrepreneurship: Profiles and Educational Implications. Presented to the Small Business Institute Directors' Association, Orlando, FL, February, 1996, and published in the *Proceedings*, p. 9-13. (With J.A. Carland).

The Exportation of the American Model of Entrepreneurship: Reality or Illusion? A Comparative Trait Study of American and Finnish Entrepreneurs Presented to the International Academy of Small Business, San Francisco, CA, June, 1997 and published in the electronic *Proceedings*. (With J.A. Carland & M. Koironen).

Entrepreneurship Education: An Integrated Approach Using an Experiential Learning Paradigm, Presented to IntEnt, International Entrepreneurship Conference, Monterey, CA, June, 1997, and published in the electronic *Proceedings*. (With J.A. Carland).

Using Innovation Techniques in Design Evaluations for Product Development: A Project Management - Human Factor Approach. Presented to the International Symposium Sovnet '97 Conference, Moscow, June, 1997, and published in the *Proceedings*, 491-497. (With J.A. Carland & S. Pascale).

Entrepreneurship Education: Building Dreams. Published in the *Art & Science of Entrepreneurship Education, Volume IV*, Akron, 1997, 56-71. (With J.A. Carland).

New Venture Creation: An Adventure in Learning. Presented to United States Association for Small Business and Entrepreneurship Conference, Clearwater, FL, January, 1998, and published in the *Proceedings*, 328. (With J.A. Carland).

Alternative Opportunities for Publication in Entrepreneurship. Presented to United States Association for Small Business and Entrepreneurship Conference, Clearwater, FL, January, 1998, and published in the *Proceedings*, 334. (With J.A. Carland).

Is Entrepreneurial Drive a Predictor of Venture Performance? Presented to the Small Business Institute Director's Association Conference, Santa Fee, NM, February, 1998, and published in the *Proceedings*, 61-66. (With J.A. Carland & M.D. Ensley).

Gender Differences Between Finish and American Entrepreneurs: An Exploratory Study. Presented to the Small Business Institute Director's Association Conference, Santa Fee, NM, February, 1998, and published in the *Proceedings*, 92-97. (With J.A. Carland, J. Nasi, & S. Nasi).

The Effect of Entrepreneurial Team Skill Heterogeneity and Functional Diversity on New Venture Performance. Presented to the Association for Small Business and Entrepreneurship Conference, Dallas, TX, March, 1998, and published in the *Proceedings*, 45-50. (With J.A. Carland & M.D. Ensley).

Is Risk Taking Propensity an Attribute of Entrepreneurship? A Comparative Analysis of Instrumentation. Presented to the Association for Small Business and Entrepreneurship Conference, Dallas, TX, March, 1998, and published in the *Proceedings*, 51-56. (With J.A. Carland & W. Stewart).

BASA: A Case of Small Business Fraud. Presented to the International Academy for Case Studies, Las Vegas, October, 1998, and abstracted in the *Proceedings*, 140. (With J.A. Carland).

Innovative Education: One University's Attempt to Make a Difference. Presented to the Decision Sciences Institute, Las Vegas, November, 1998, and published in the *1998 Proceedings, Volume 1*, 272-274. (With J.A. Carland).

Entrepreneurship Education: The Need to March to a Different Drum. Presented to Small Business Directors Association, Region IV, Atlanta, GA, September, 1999, and published in the *Proceedings*, 7-16. (With J.A. Carland & M.D. Ensley).

The Indefatigable Entrepreneur: A Study of the Dispositions of Multiple Venture Founders. Presented to the Association of Small Business and Entrepreneurship, San Antonio, TX, March, 2000, and published in the *Proceedings*, 168-180. (With J.A. Carland & W. H. Stewart).

Fraud: A Concomitant Cause of Small Business Failure. Small Business Institute Director's Association *Proceedings*, San Antonio, TX, February, 2000, 312. (With J. A. Carland & Jason W. Carland).

The Game of Entrepreneurial Strategy. Presented to the Association of Management, San Antonio, TX, May, 2000, and published in the *Proceedings*, 81-86. (With J.A. Carland).

New Venture Creation Model. Presented to the Association of Small Business and Entrepreneurship, New Orleans, LA, February, 2001, and published in the *Proceedings*, 1-7. (With J.A. Carland).

An Investigation of the Planning-Performance Conundrum in a Dynamic Macroentrepreneurial Environment. Presented to the Small Business Institute, New Orleans, LA, February, 2003. (With J. A. Carland).

A Model of Entrepreneurial Planning and Its Effect on Performance. Presented to the Association of Small Business and Entrepreneurship, Houston, TX, March, 2003, and published in the *Proceedings*, 1-16. (With J. A. Carland).

REFEREED PRESENTATIONS

Differentiating Entrepreneurs from Small Business Owners in New Venture Formation. Presented to the Babson College Conference on Entrepreneurship, Wellesley, MA, April, 1983. (With F. Hoy).

Southeastern Video Services: A Case Study. Presented to the North American Case Research Association, New Orleans, November, 1984. (With J.A. Carland).

The Case of the Missing Golf Cart. Presented to the North American Case Research Association, New Orleans, November, 1985. (With J.A. Carland).

The Continuing Case of the Missing Golf Cart. Presented to the North American Case Research Association, New Orleans, November, 1985. (With J.A. Carland).

Star View Satellite Systems. Presented to the North American Case Research Association, New Orleans, November, 1985. (With J.A. Carland).

The Case of the Reluctant Client. Presented to the North American Case Research Association, New Orleans, November, 1985. (With J.A. Carland).

The Continuing Case of the Reluctant Client. Presented to the North American Case Research Association, New Orleans, November, 1985. (With J.A. Carland).

Big GAAPs and Little GAAPs: Accounting for Small Business. Presented to the International Council for Small Business, Ontario, Canada, June, 1989. (With J.A. Carland & J. Dye).

Cognitive Distinctions Between Entrepreneurs, Small Business Owners and Managers. Presented to the International Council of Small Business, Ontario, Canada, June, 1989. (With J.A. Carland).

Who is an Entrepreneur? An Empirical Investigation. Presented to the International Council of Small Business, Ontario, Canada, June, 1989. (With J.A. Carland).

Toward an Understanding of the Environmental Impact of German Reunification. Presented to the Association for Global Business, Orlando, FL, November, 1990. (With J.A. Carland & M.D. Ensley).

Federally Mandated Programs: A Catch 22 for Small Business. Presented to the Southwestern Small Business Institute Association, Houston, TX, March, 1991. (With J.A. Carland & J.L. Dye).

Ethics in Research: The Enigma of Co-Authorship. Presented to the Southwestern Decision Sciences Institute, San Antonio, TX, March, 1992. (With J.A. Carland & R.L. Lorentz).

Stockbrokers may be Hazardous to your Wealth. Presented to the Association of Management, Las Vegas, NV, August, 1992. (With J.A. Carland, C.D. Aby & J.L. Dye).

A Program to Treasure: Expert Systems in Public Cash Management. Presented to the Association of Management, Las Vegas, NV, August, 1992. (With J.A. Carland, D. Crockett, C.D. Aby & J.L. Dye).

Planning and Small Business: A Dissonant Conjunction. Presented to the Association of Management, Las Vegas, NV, August, 1992. (With J.A. Carland & J.L. Dye).

Portraits of Potential Entrepreneurs: An Empirical Investigation. Presented to the Southwest Small Business Institute Association, New Orleans, March, 1993. (With J.A. Carland & R.C. Higgs).

Entrepreneurship as an Economic Change Agent: Savior or Destroyer? Presented at the International Council for Small Business, June 1993, Las Vegas, NV. (With J.A. Carland).

The Dark Side of Total Quality Management: An Opportunity for Small Business. Presented at the United States Association for Small Business and Entrepreneurship, October, 1993, Baltimore, MD. (With J.A. Carland).

Innovation: The Hallmark of Entrepreneurship Education. Presented to the Entrepreneurship Education Conference, San Antonio, February, 1994. (With J.A. Carland).

Challenges in the Development and Application of Small Business Cases. Presented at the Small Business Institute Director's Association, San Antonio, February, 1994. (With J.A. Carland & C. Anyansi-Arcibong).

SBA Cases and Student Consultants: Getting Faculty, Student and Business Owner Expectations, Actions and Outcomes in Synchronization. Presented at the Entrepreneurship Education Conference, San Antonio, February, 1994. (With J.A. Carland & W.L. Boyd).

Innovation and Cognition: Requisites to Management Success. Presented at the Academy of Business Administration, Las Vegas, February, 1994. (With J.A. Carland & J.L. Dye).

Research and Development in Small Business: An Investment in the Future. Presented to the Southwest Small Business Institute Association, Dallas, March, 1994. (With J.A. Carland & W.L. Boyd).

Entrepreneurship as a Vehicle for Self Actualization. Presented to the Babson College Entrepreneurship Conference, Houston, TX, June 1994. (With J.A. Carland & Frank Hoy).

An Examination of the Differences Between Entrepreneurial Drives of International and American Small Business Owners and Managers. Presented to the Association of Global Business, Las Vegas, NV, November, 1994. (With J.A. Carland & J.W. Carland, III).

Policy and Strategic Planning Ramifications of the 1993 Deficit Reduction Legislation on Small Business. Presented to the Decision Sciences Institute, Honolulu, HI, November, 1994. (With J.A. Carland & J.L. Dye).

An Accountability Explosion: The Costs of Corporate Management Revealed. Presented to the Decision Sciences Institute, Honolulu, HI, November, 1994. (With J.A. Carland, J.L. Dye, & J. Jones).

Expert Systems in Local Governments: A Program to Treasure. Presented to the International Academy of Business Administration, Cancun, Mexico, December, 1994. (With J.A. Carland, J.L. Dye, D. Crockett, & C.D. Aby).

Risk Taking Propensity among Entrepreneurs, Small Business Owners and Managers. Presented to the Southwestern Small Business Institute Directors' Association, Houston, TX, February, 1995. (With J.A. Carland, J.W. Carland, III & J. Pearce).

Case Development Workshop. Presented to the Academy of Business Administration, Reno, February, 1995. (With J.A. Carland).

Cognitive Dimensions of Temperament and Risk Taking Propensity Among Entrepreneurs, Small Business Owners and Managers. Presented to the Association of Private Enterprise, Las Vegas, April, 1996. (With J.A. Carland).

Entrepreneurship: The Wealth of Nations. Presented to the Research on Innovative Strategies and Entrepreneurship Conference, Jyvaskyla, Finland, June, 1996. (With J.A. Carland).

Innovative Education in an Integrated Business Core Curriculum: An Experiential Learning Paradigm. Presented to the Decision Sciences Institute, Orlando, FL, November, 1996. (With J.A. Carland & R. Higgs).

Small Business Valuation: An Important Tool for Practitioners. Presented to the Small Business Directors' Institute Association. Region IV, Orlando, February, 1997. (With J.A. Carland).

Entrepreneurship: An American Dream. Presented to the Association for Small Business and Entrepreneurship, New Orleans, March, 1997. (With J.A. Carland).

Publishing Alternatives in Entrepreneurship. Presented to the United States Small Business and Entrepreneurship conference, Clearwater, January, 1998. (With J.A. Carland).

Adventure in Learning. Presented to the United States Small Business and Entrepreneurship conference, Clearwater, January, 1998. (With J.A. Carland).

The Search for the Lead Entrepreneur: Identification Through the Measurement of Entrepreneurial Drive and Skills. Presented to the Babson College Entrepreneurship Conference, Gent, Belgium, May, 1998. (With J.A. Carland & M.D. Ensley).

An Integrated Approach to the Business Core Using an Experiential Learning Paradigm. Presented to the Southern Management Association, New Orleans, November, 1998. (With J.A. Carland).

New Venture Performance Model. Presented to the USASBE/SBIDA Conference, Orlando, February, 2001. (With J.A. Carland).

An Investigation of the Planning-Performance Conundrum in a Dynamic Macroentrepreneurial Environment. Presented to the Small Business Institute, New Orleans, LA, February, 2003. (With J. A. Carland).

Implementation of a Model Entrepreneurship Program. Presented to the United States Association for Small Business and Entrepreneurship, Tucson, AZ, January, 2006. (With J.A. Carland).

The Darkside of Entrepreneurship Revisited: American Style. Presented to the International Council on Small Business, Washington, D.C., June, 2005 (With J.A. Carland, F.Lockwood and R. Teasley).

The Multi-facets of Female Entrepreneurship: Their Dreams and Their Realities. Presented to the International Council on Small Business, Washington, D.C., June, 2005. (With J.A. Carland and R. Carton).

The Darkside of Entrepreneurship: Can Entrepreneurship Education Make a Difference?. Presented to the Association of Small Business and Entrepreneurship Conference, Corpus Christi, TX., November, 2006. (With F S. Lockwood, R. Teasley and J.A. Carland).

Case Writing Symposium. Presented to the United States Association for Small Business and Entrepreneurship/Small Business Institute, Orlando, January, 2007 (With J.A. Carland).

INVITED PRESENTATIONS

6/72-6/77: More than 200 appearances as a guest speaker on banking and economic topics in civic clubs, and public and private school systems in Western North Carolina on behalf of the North Carolina Young Bankers Association.

8/78-1/80: More than 100 appearances before University of Georgia Continuing Education Division Groups on entrepreneurial and management information systems topics on behalf of the Small Business Development Center.

Obtaining a Commercial Loan. Presentation at the Small Business Management Seminar, sponsored by the Small Business Administration, Asheville, NC, May, 1977.

Effective Controlling through Record Keeping. Presentation at the Small Business Management Seminar, sponsored by Small Business Administration, Asheville, NC, April, 1978.

Taxes and Accounting. Presentation at the Annual Meeting of the Pet Industry Association of Georgia, Atlanta, September, 1978.

The Impact of Information on Profits. Presentation at the Southeastern Shoe Retailers and Travelers Seminar, Athens, GA, May, 1979.

Effective Record Keeping in an SBDC. Presentation at the Small Business Development Center Advisory Council Seminar, sponsored by the Small Business Administration, Washington, DC, November, 1979.

Accounting in a Rehab Facility. Presentation at the Georgia Association of Rehabilitation Facilities Seminar, Athens, GA, March, 1980.

Information and Its Link to Profits. Presentation at the Southeastern Shoe Retailers and Travelers Seminar, Athens, GA, May, 1980.

Financing Your Business. Presentation at the Entrepreneurship and Black Youth Conference, sponsored by the Office of Minority Business Development, Athens, GA, May, 1980.

Managing in Inflationary Times. Presentation at the Southern Area Division Staff Conference of the American Cancer Society, Atlanta, July, 1980.

Microcomputers and their Applications. Presentation at the Georgia Association of Rehabilitation Facilities, Macon, GA, July, 1980. (With J.A. Carland).

Fiscal Management in the Rehab Sector. Presentation at the Auburn University Rehabilitation Facility Administration Seminar, Auburn, AL, January, 1981.

Fiscal Management in the Rehab Sector. Presentation at the Auburn University Rehabilitation Facility Administration Seminar, Burlington, NC, March, 1981.

Advanced Fiscal Management in the Rehab Sector. Presentation at the Auburn University Rehabilitation Facility Administration Seminar, Wilmington, NC, August, 1981.

Microcomputers at Work and Play. Presentation at the Georgia Professional Secretaries Institute, Athens, GA, February, 1982. (With J.A. Carland).

Microcomputers at Work and Play. Presentation at the Georgia Professional Secretaries Institute, Athens, GA, March, 1982. (With J.A. Carland).

Educational Techniques in Accounting. Presentation at the Trends in Education of Accountants Seminar, Blacksburg, VA, November, 1982.

Microcomputers and the Small Businessman. Presentation at the Western Carolina University Business Week, Cullowhee, NC, April, 1983. (With J.A. Carland).

The Use of Microcomputers in Accounting. Presentation at the North Carolina Accounting Education Colloquium, Cullowhee, NC, April, 1983. (With J.A. Carland).

Are Journals Obsolete? Presentation at the Trends in Education of Accountants Seminar, Blacksburg, VA, November, 1983. (With J.A. Carland & J.T. Overbey).

Forecasting in a Small Business Setting. Presentation at the Small Business Financial Management Seminar, sponsored by the WCU Small Business Development Center, Asheville, NC, April, 1985.

The Impact of Microcomputers on Higher Education. Presentation at Gaston College, Dallas, NC, September, 1985. (With J.A. Carland).

Computers in Accounting Applications. Presentation at the North Carolina Association of Educators of Data Systems, Raleigh, NC, April, 1986. (With J.A. Carland).

The Impact of Microcomputers on the Effectiveness of Education in Accounting: Caveats and Rewards. Presentation at the North Carolina Association of Accounting Professionals, Greensboro, NC, September, 1987. (With J.A. Carland).

Basic Financial Skills. Presented to the New Managers' Institute, Mountain Area Health Education Center, Hickory, NC, May, 1989.

Research Seminar. Presentation to the Faculty of the School of Business, University of Tennessee at Martin, Martin, TN, September 4, 1991. (With J.A. Carland).

The Impact of Employee Malfeasance on Firm Performance. Presentation to Accounting Professionals for Continuing Professional Education, Western Carolina University, Cullowhee, NC, November, 1993.

Case Development Workshop. Presentation to the Southeastern Case Research Association, Myrtle Beach, SC, March, 1994. (With J.A. Carland).

The Impact of Cognitive Styles on an Accounting Practice. Presentation to Accounting Professionals for Continuing Professional Education, Western Carolina University, Cullowhee, NC, September, 1994. (With J.A. Carland).

The Value of Financial Statement Analysis in Recognizing Trends. Presentation to Accounting Professionals for Continuing Professional Education, Western Carolina University, Cullowhee, NC, September, 1994. (With J.A. Carland).

Financial Analysis. Presentation to Accounting Professionals for Continuing Professional Education, Western Carolina University, Cullowhee, NC, October, 1995. (With J.A. Carland).

Case Development Workshop. Presentation to the International Academy for Case Studies, Nassau, The Bahamas, October, 1995. (With J.A. Carland).

Performance Evaluation Techniques. Presentation to the Plant Managers Conference, March, 1996.

Accountants as Experts. Presentation to the North Carolina Academy of Trial Lawyers, Wilmington, NC, August 3, 1996. (With J.A. Carland).

Journal Publication and Proceedings. Presentation to the Allied Academies, Maui, October, 1996. (With J.A. Carland).

Litigation Support Services. Presentation to Accounting Professionals for Continuing Professional Education, Western Carolina University, Cullowhee, NC, November 2, 1996. (With J.A. Carland).

Publication Opportunities for Small Business. Presentation to the Small Business Directors' Institute Association, Region IV, Orlando, February, 1997. (With J.A. Carland).

Journal Publication Opportunities. Presentation to the Allied Academies, Las Vegas, April, 1997. (With J.A. Carland).

The American Dream. Presentation to the Charlotte Business Expo, Charlotte, NC, September, 1997. (With J.A. Carland).

Small Business Education. Presentation to the Economic Development Task Force, Cherokee, NC, October, 1997. (With J.A. Carland).

Fraud Investigations: Profession of the Future. Presentation to the Franklin Civitan Club, Franklin, NC, October, 1997. (With J.A. Carland).

Fraud Investigations: Profession of the Future. Presentation to the Accounting Professionals for Continuing Professional Education Seminar, Cullowhee, NC, November, 1997. (With J.A. Carland).

Fraud Prevention and Detection. Presentation to the Metrolinas Entrepreneurship Council, Charlotte, NC, March, 1998. (With J.A. Carland).

Fraud Investigations: Profession of the Future. Presentation to the Sylva Kiwanis Club, Sylva, NC, April, 1998. (With J.A. Carland).

Fraud Prevention and Detection. Presentation to the Piedmont Entrepreneurship Council, Greensboro, NC, May, 1998. (With J.A. Carland).

Fraud Investigations: Profession of the Future. Presentation to the Asheville Civitan Club, Asheville, NC, June, 1998. (With J.A. Carland).

How to Start a Small Business. Presentation to Phi Lambda Delta, Cullowhee, NC, February, 1999. (With J.A. Carland).

Fraud: Crime Without Punishment. Presentation to the Institute of Management Accountants, Cullowhee, NC, February, 1999. (With J.A. Carland).

Entrepreneurship: The American Dream and the Source of a Nation's Wealth. Presentation to the Young Entrepreneurs, Western Carolina University, Cullowhee, NC, February, 1999. (With J.A. Carland).

Case Development Opportunities. Presentation to the Allied Academies, Myrtle Beach, SC, April, 1999. (With J.A. Carland).

Journal Publishing Opportunities. Presentation to the Allied Academies, Las Vegas, NV, October, 1999. (With J.A. Carland).

Case Development Workshop. Presentation to the Allied Academies, Myrtle Beach, SC, April, 2000. (With J.A. Carland).

Journal Publication Workshop. Presentation to the Allied Academies, Myrtle Beach, SC, April, 2000. (With J.A. Carland).

Entrepreneurship workshop. Presentation to the Dutch, Cullowhee, NC, September, 2000. (With J. A. Carland)

Entrepreneurship workshop. Presentation to the Dutch, Cullowhee, NC, January, 2001. (With J. A. Carland).

Entrepreneurship: The Economic Engine. Presentation at the Entrepreneurship Summit, Cullowhee, NC, November 19, 2003. (With J. A. Carland)

Entrepreneurship: A Model Curriculum. Presentation to the United States Association of Small Business and Entrepreneurship, Dallas, TX, January 16, 2004. (With J.A. Carland).

The Master of Entrepreneurship Program. Presentation to the Rotary Club in Asheville, NC, January 29, 2004. (With J.A. Carland).

Changing Ideas to Businesses: The Impact on the Economic Development of the Region, Smoky Mountain High School, Junior Class, May 4, 2004. (With J. A. Carland)

Entrepreneurship: A Model Curriculum. Presentation to the United States Association of Small Business and Entrepreneurship, Palm Springs, CA, January, 2005. (With J.A. Carland).

Writing Business Cases, Presented to the Trident Initiative, Frostburg, MD, July 15, 2005. (With J.A. Carland).

Series of lectures on Small Business and Entrepreneurship to Blue Ridge Community College participants, March-September, 2006. (With J.A. Carland).

SERVICE

PROFESSIONAL ACTIVITIES

- 1988-1989 Participant as expert in statistical analysis on dissertation of Kerr (Buddy) Watson, University of Tennessee, Knoxville, TN
- 1990-1991 Curriculum Review Committee for Business Computer Programming at Southwestern Community College, Webster, NC
- 1990-1991 Participant as entrepreneurship expert in Delphi Technique for dissertation of Bruce E. Herbert, University of Oregon
- 1991 Paid Consultant for Faculty Research and Innovative Teaching Methodology, University of Tennessee at Martin, Martin, TN
- 1992 Paid Consultant in Curriculum Design and Business Planning for William Carey College, Hattiesburg, MS
- 1992-1993 Member of the Board of Directors, Community Bank, Sylva, NC

COMMUNITY ACTIVITIES

- 1982-Present Pro bono consulting services for numerous individuals and small business clients (10 to 20 per year) in financial difficulties requiring financial, managerial and computer information systems assistance and referred by the Western North Carolina Consumer Credit Counseling Service
- 1989-1993 Advisory Council, Western North Carolina Consumer Credit Counseling Service, Asheville, NC
- 1971-Present A variety of community service activities, including: *Church Service*: Sunday School Teacher - 2 years; Men's Club; Member of the Administrative Board and the Finance Committee; Coordinator of Young Adult Activities; Education Chairman;

and *Jaycees*: 5 years; Jaycee of the Month Award; Chairman of the Year Award; Vice President and Member of the Board of Directors of Asheville Jaycee Housing (a \$2 million low income housing project); President and Founder of Western Carolina Jaycee Housing; and *Young Bankers Division of the NC Bankers Association*: 5 years; Chairman, Project TELL (Teach Economic Literacy Lectures); Statewide Merit Award Winner; Member of the Board of Directors, representing the 14 western counties of NC, and *Robert Morris Associates* (A National Banking Organization): 2 years; Member of the National Statement Studies Committee; and *American Institute of Banking*: 2 years; Member of the Board of Directors of the Asheville Chapter; Treasurer of the Asheville Chapter; Education Director for the Asheville Chapter; and *Pisgah Girl Scout Council*: 2 years; Member of the Board; Chairman of the Corporate Planning Committee; Member of the Finance Committee; and *Asheville Optimist Club*: 2 years; Assistant Secretary and Treasurer; Member of the Board; Member of Santa Pal; and *United Way*: 5 years; Member of the Board; Fund raiser in the Residential and Commercial Divisions; Team Captain in the Commercial Division; and Active in numerous fund raising and other activities for the *Heart Fund*, *Boy Scouts*, *March of Dimes*, *Muscular Dystrophy*, *YMCA*, *YWCA* and other charitable organizations

ACADEMIC ACTIVITIES

- 1984-Present Referee, and Discussant for a wide variety of academic organizations, including: Southern Management Association; North American Case Research Association; Academy of Management; Southeast Decision Sciences Institute; Decision Sciences Institute; International Council on Small Business; United States Association of Small Business; Small Business Institute Directors' Association; Southeast Case Research Association; International Academy of Business Administration; Entrepreneurship Education Conference; Association of Global Business; Southwestern Small Business Institute Association;
- 1984-Present Service as Editorial Board Member or Referee for a wide variety of academic journals including: *Academy of Management Journal*; *Decision Sciences Journal*; *Journal of Business and Economic Perspectives*; *Entrepreneurship: Theory and Practice*; *Journal of Business Venturing*; *Case Research Journal*; *Journal of Small Business Strategy*; *Journal of Management Studies*; and *Case Development Journal*
- 1994 Co-Founder (with J.A. Carland) of the International Academy for Case Studies and the *Journal of the International Academy of Case Studies*

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- 1995 Co-Founder (with J.A. Carland) of the Academy of Entrepreneurship and the *Academy of Entrepreneurship Journal*, and the *Entrepreneurial Executive*
- 1996 Co-Founder (with J.A. Carland) of the Allied Academies
- 1997 Co-Founder (with J.A. Carland) of the *Academy of Accounting and Financial Studies Journal*; *Academy of Managerial Communications Journal*; *Academy of Educational Leadership Journal*; *Academy of Marketing Studies Journal*; *Academy of Strategic and Organizational Leadership Journal*
- 1998 Co-Founder (with J.A. Carland) of *International Journal of Entrepreneurship*, *Academy for Studies in Business Law Journal*, *Academy of Information and Management Science Journal*, and *Journal of Entrepreneurship Education*
- 1992-Present Service as Co-Editor (with J.A. Carland) for a wide variety of academic journals including: *Case Development Journal*; *Journal of the International Academy of Case Studies*; *Academy of Entrepreneurship Journal*; *Entrepreneurial Executive*; *Academy of Accounting and Financial Studies Journal*; *Academy of Managerial Communications Journal*; *Academy of Educational Leadership Journal*; *Academy of Marketing Studies Journal*; *Academy of Strategic and Organizational Leadership Journal*; *Academy for Studies in Business Law Journal*; *Academy of Information and Management Science Journal*
- 1992-Present Co-Conference Chair (with J.A. Carland) for a wide variety of academic organizations and Co-Editor (with J.A. Carland) of their *Proceedings* including: Southeast Case Research Association; International Academy for Case Studies; Academy of Entrepreneurship; Academy of Accounting and Financial Studies; Academy of Marketing Studies; Academy of Managerial Communications; Academy of Educational Leadership; Academy of Strategic and Organizational Leadership; Academy for Free Enterprise Education; Academy of Information and Management Science; Academy for Studies in Business Law; Academy of Economics and Economic Education

UNIVERSITY ACTIVITIES

- 1982-2007 Active as committee member of a wide variety of department, college and university committees, including:
 Department Committees:
 CIS Department Curriculum Review Committee; Accounting Department Curriculum Review Committee; Departmental Tenure, Promotion & Reappointment Committee; Master's of Accountancy Degree Development Committee

College Committees:

College of Business Curriculum Committee; College of Business Computer Advisory Committee; College of Business Dean's Advisory Committee; College of Business Tenure, Promotion & Reappointment Committee; College of Business Graduate Programs Committee, College of Business Scholarship Committee

University Committees:

University Computer Center Advisory Committee; University Symposium on Faculty Research; University Research Council; Faculty Senate and Faculty Senate Steering Committee; University Grievance Committee; University Hearing Committee, Ad hoc Salary Committee

- 1982-2007 Active in student advising, 20 to 50 students per year; active as co-organizer of National Association of Accountants Club and faculty advisor for that club; co-founder (with J.A. Carland) of Young Entrepreneurs and faculty advisor for that club
- 1988-1995 Co-director (with J.A. Carland) of the Small Business Institute and responsible for grants funding of \$37,500
- 1992-1994 Member of dissertation committee of David Piltz, Nova University
- 1996-1997 Assisted in the creation, design and team teaching of an experimental business core curriculum for the College of Business, Western Carolina University, Cullowhee, NC
- 1998-2000 Co-designed and co-developed (with J.A. Carland) an Entrepreneurship Curriculum, and Request to Plan a New Program: B.S.B.A. degree with a major in Entrepreneur. Planned the program, and obtained authorization to Establish the program from the University of North Carolina General Administration. Prepared the documentation to support the program establishment. The Entrepreneurship Major will be the first of its kind in North Carolina, and one of the first in the Southeastern United States.
- 2001-2004 Served on various committees within the University including: College of Business Senate Representative, Member of the College and Department Tenure, Promotion and Reappointment committees, the Hearing Committee and many intra-departmental subcommittees
- 2006 Served as external reviewer for M.J. Alhabeeb, University of Massachusetts at Amherst for promotion
- 2006 Served as external reviewer for Marius Pretorius, University of Pretoria, South Africa for promotion
- 2006 Served as Reader for the Dissertation of Rick Newby, University of Western Australia entitled, "Examining the Goals of Small and Medium Enterprise Owner-Operators"

RECOGNITION AND HONORS

- 1985 Recipient of Service Award from the National Association of Accountants, Student Chapter, Western Carolina University
- 1986 Finalist, Chancellor's Distinguished Teaching Award, Western Carolina University
- 1986 Recipient of Teaching Award from MBA Student Association, Western Carolina University
- 1986 Recipient of Teaching Award from the National Association of Accountants, Student Chapter, Western Carolina University
- 1988 Finalist, Chancellor's Distinguished Teaching Award, Western Carolina University
- 1989 Beta Gamma Sigma, National Honor Society for Business
- 1990 Finalist, Chancellor's Distinguished Teaching Award, Western Carolina University
- 1991 Candidate for the University Creative Research Award, Western Carolina University
- 1991 Finalist in the Best Empirical Paper Competition for the United States Association for Small Business and Entrepreneurship Conference, San Diego, CA, 1991, for "Profiles of New Venturists and Corporate Managers: Is There a Difference?" (With J.A. Carland).
- 1993 Honorable Mention in the Best Paper Competition for the Southwestern Small Business Institute Association Conference, New Orleans, 1993, for "Portraits of Potential Entrepreneurs: An Empirical Investigation." (With J.A. Carland & R. Higgs).
- 1994 Honorable Mention in the Best Paper Competition for the Southwestern Small Business Institute Association Conference, New Orleans, 1994, for "Research and Development in Small Business: An Investment in the Future." (With J.A. Carland & W.L. Boyd).
- 1995 First Runner Up in the Best Paper Competition for the Small Business Institute Directors' Association Conference, Nashville, February, 1995, for "Self-

Actualization: The Zenith of Entrepreneurship." (With J.A. Carland & J.W. Carland, III).

- 1995 First Runner Up in the Best Paper Competition for the Southwestern Small Business Institute Association Conference, Houston, March, 1995, for "Risk Taking Propensity Among Entrepreneurs, Small Business Owners and Managers." (With J.A. Carland, J.W. Carland, III, & J. Pearce).
- 1996 Winner Distinguished Paper Award in the Best Paper Competition for the Small Business Institute Directors' Association Conference, San Diego, February, 1996, for "Seeing What's Not There: The Enigma of Entrepreneurship." (With J.A. Carland & W.H. Stewart).
- 1996 Winner of the Richard D. Irwin, Inc. 1996 Distinguished Paper Award at the Southwestern Federation of Administrative Disciplines in the Southwestern Small Business Institute Association track, San Antonio, March, 1996, for "Empirically Defining the Entrepreneur." (With J.A. Carland & W.H. Stewart).
- 1996 Winner of the Homer P. Saunders Outstanding Paper Award at the Association for Small Business and Entrepreneurship Conference, San Antonio, TX, March, 1996, for "Empirically Defining the Entrepreneur." (With J.A. Carland & W.H. Stewart).
- 1996 Key Note speaker (with J.A. Carland) for the RISE 96 conference (Research on Innovative Strategies and Entrepreneurship) at the University of Jyväskylä, Finland, June 12-13, 1996.
- 1997 Winner Distinguished Empirical Paper Award in the Best Paper Competition for the Small Business Institute Directors' Association Conference, Orlando, February, 1997, for "A Model of Potential Entrepreneurship: Profiles and Educational Implications." (With J.A. Carland).
- 1997 Winner Conference Theme Paper Award at the Association for Small Business and Entrepreneurship Conference, New Orleans, March, 1997, for "Entrepreneurship: An American Dream." (With J.A. Carland).
- 1997 Candidate for the University Scholar Award, Western Carolina University

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- 1998 Winner of the Irwin/McGraw Hill Distinguished Paper Award at the Southwestern Federation of Administrative Disciplines in the Association for Small Business and Entrepreneurship track, Dallas, TX, March, 1998, for “The Effect of Entrepreneurial Team Skill Heterogeneity and Functional Diversity on New Venture Performance.” (With J.A. Carland & M.D. Ensley).
- 1998 Winner of the Homer P. Saunders Outstanding Paper Award at the Association for Small Business and Entrepreneurship Conference, Dallas, TX, March, 1998, for “The Effect of Entrepreneurial Team Skill Heterogeneity and Functional Diversity on New Venture Performance.” (With J.A. Carland & M.D. Ensley).
- 1998 Winner of the Association for Small Business and Entrepreneurship Research Award at the Association for Small Business and Entrepreneurship Conference, Dallas, TX, March, 1998, for “Is Risk Taking Propensity an Attribute of Entrepreneurship?” (With J.A. Carland & W.H. Stewart).
- 1998 Featured in *Entrepreneurship: History of Management Thought*, edited by S. Birley, Imperial College of Science, Technology and Medicine, published by Dartmouth Publishing Company, Ltd., Aldershot, United Kingdom. The volume features a compilation of the 31 most important articles in the development of the entrepreneurship literature, as identified by the Editor and Publishers.
- 1998 Winner of the College of Business Award for Creative Teaching, Western Carolina University, Cullowhee, NC, for work in the experimental, integrated business core. (With J.A. Carland).
- 2000 Featured in *Small Business: Critical Perspectives*, edited by D. Storey, University of Warwick, United Kingdom, published by Routledge, London, United Kingdom, as part of the *Routledge Major Works* series.
- 2000 Featured in *Advances in Entrepreneurship*, edited by P. Westhead, University of Stirling, United Kingdom and M. Wright, University of Nottingham, United Kingdom, a compilation of important articles in entrepreneurship published by Edward Elgar Publishing Limited, Cheltenham, United Kingdom.
- 2000 Winner of the Irwin/McGraw Hill Distinguished Paper Award at the Southwestern Federation of Administrative Disciplines in the Association for Small Business and Entrepreneurship track, San Antonio, TX, March, 2000, for “The Indefatigable
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- Entrepreneur: A Study of the Dispositions of Multiple Venture Founders.” (With J.A. Carland & W.H. Stewart).
- 2001 Winner of the McGraw Hill/Irwin Distinguished Paper Award at the Southwestern Federation of Administrative Disciplines in the Association for Small Business and Entrepreneurship track, New Orleans, LA, February, 2001, for “New Venture Creation Model” (With J.A. Carland).
- 2003 Winner Distinguished Empirical Paper Award in the Best Paper Competition for the Small Business Institute Conference, New Orleans, February, 2003, for "An Investigation of the Planning-Performance Conundrum in a Dynamic Macroentrepreneurial Environment.” (With J.A. Carland).
- 2003 Winner of the Association for Small Business and Entrepreneurship Research Award at the Association for Small Business and Entrepreneurship Conference, Houston, TX, March, 2003, for “A Model of Entrepreneurial Planning and Its Effect on Performance?” (With J.A. Carland).
- 2003 Winner of the McGraw Hill/Irwin Distinguished Paper Award at the Federation of Business Disciplines in the Association for Small Business and Entrepreneurship track, Houston, TX, March, 2003, for “A Model of Entrepreneurial Planning and Its Effect on Performance?” (With J.A. Carland).
- 2003 Featured in *Entrepreneurship: Critical Perspectives on Business and Management*, edited by N. Kreuger, published by Routledge Publishing Company, London, United Kingdom. This 4 volume set features a compilation of the 99 most influential articles in the entrepreneurship literature, as identified by 200 leading researchers in the field. Two of our works were selected for this series.
- 2003 Winner of the University Scholar Award, Western Carolina University.
- 2003 Winner of the McCracken Graduate Teaching Award
- 2004 Finalist for the Model Program in Graduate Entrepreneurship at the United States Association for Small Business and Entrepreneurship, Dallas, TX, January, 2004. (Came in second to Harvard University)

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- 2004 Winner of the Distinguished Paper Award at the Association for Small Business and Entrepreneurship Conference, Albuquerque, NM, March, 2004, for “Economic Development: Changing the Policy to Support Entrepreneurship,” (With J.A. Carland).
- 2004 Recognition as a Fellow of the Association of Small Business and Entrepreneurship, Albuquerque, NM, March 25, 2004.
- 2004 Winner of the Unit Award for Outstanding Programs for the Entrepreneurship Program, Western Carolina University, April 23, 2004.
- 2005 Winner of the Outstanding Master Program Model Award from the United States Association of Small Business and Entrepreneurship, January, Indian Wells, CA
- 2005 Outstanding Educator in the Master of Entrepreneurship Program
- 2005 Finalist for the College of Business Excellence Award
- 2006 Winner of the Distinguished Paper Award at the Association for Small Business and Entrepreneurship Conference, Corpus Christi, TX, November, 2006, for “The Darkside of Entrepreneurship: Can Entrepreneurship Education Make a Difference?” (With J. Carland, F. Lockwood and R. Teasley).
- 2007 Winner of the Small Business Institute Legend’s Award for most influential research of the decades 1980 to 2000 for the 1984 article in *Academy of Management Review*. (With J. Carland, F. Hoy and B. Boulton).
- 2007 Winner of the “High Cotton” award for contributions to entrepreneurship and economic development in North Carolina, bestowed by Advantage West, the western North Carolina Economic Development Group.