

Termination Report

Project Title: NC 1030 Family Firms and Policy

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Overview: The legacy of the NC 1030 committee (formerly NE 167) exemplifies the benefits of the cooperative infrastructure of state experiment stations and the mission of land grant universities. Composed of researchers from the fields of agricultural economics, human development and family science, retailing, family economics and management, the group is multidisciplinary and national in scope. Member states represent four regions.

NC 1030 has addressed pressing needs using state of the art research tools and information delivery. The original members began working together in a study of home based business in Vermont when incomes of many families were jeopardized by a court order banning work at home. With the initiation of NE 167 shortly thereafter, the scope of the work expanded to home based businesses nationally, and then to family firms, especially the interaction between family, firm and community and those resources, processes, events and policies which guide the firm to success or to demise including most recently, response to disasters. The work has been guided by a unique theoretical model (Sustainable Family Business Model) developed by the committee and derived from systems theory.

Issue, problem or situation addressed by the project or committee: Most U.S. firms are family owned. They generate over 50% of all gross business revenue in the U.S. and over 50% of all American jobs. Family-owned firms are the engines of innovation and job creation. Despite their size, family firms are critical players in the social and political fabric of communities.

The committee has addressed the study of family firms using an innovative approach. The 1987 Home Based Work survey (HBWS) was the first area probability sample of home-based workers. It demonstrated the feasibility of using a *household sampling frame* to obtain data on businesses and using telephone interviews to obtain a high response rate for this statistically rare population. The broader 1997 National Family Business Survey (NFBS) demonstrated the feasibility of obtaining a high response rate from a national geographic area probability sample and was the first to use a household sampling frame to study family firms and to establish prevalence data. The 2000 National Family Business Panel (NFBP) was the first longitudinal data set from a national, representative panel sample of family business owners; it has a 71.1% response rate. The National Family Business Disaster Panel (NFBDP) was the first national, longitudinal data on family firm experiences with natural disasters.

The committee has developed a reputation for cutting edge quantitative analyses of family firms. Astrachan and Kurtz (1998) described the 1997 NFBS as "...one of the biggest methodological breakthroughs since the founding of the family business field (p. v)." The systems theory approach to family firms is innovative. It tests the theoretical premise that what happens in the family influences what happens in the firm as well, and that both family and firm influence, and are influenced by, community factors. Other work on family firms has focused primarily on factors internal to the business and business network and has not addressed the interaction of family, firm and community.

Project objectives: The common focus over multiple five year projects has always been family firms. Presently, objectives are to: 1) analyze the effects of a) internal and external

events and policy changes on family businesses and b) the consequent, indirect effects on communities, and

2) analyze the effects of family businesses and communities on the vitality of each. These objectives test the flow of capital stocks between the family, firm and community sub-systems of the theoretical model. Currently, work has focused on the family firm and policy in the context of external and internal events such as death, divorce and natural disasters. It has provided a unique opportunity to test the theoretical model when all three subsystems (firm, family and community) are under stress, and to assess whether policies such as federal disaster support are contributing to sustainability or demise.

The work of this committee addresses a high priority opportunity for federal funding in social, behavioral, and economic sciences identified in 2009 by the National Science and Technical Council, namely societal resilience/response to disasters. The committee also directly addresses the purpose of the joint USDA/NSF research program on disaster resilience in rural communities, and since natural disasters are a documented consequence of climate change, the work of NC 1030 contributes to that USDA priority.

Outputs: More than 139 refereed books, chapters and research articles using these data have been published in journals in economics, sociology, psychology, family relations, business, finance, disasters, and climate change, thus feeding more than one discipline. In addition, a large number of the committee's 145+ state, national and international presentations have been given at associations whose members come from primarily from non-agricultural disciplines such as the United States Association of Small Business and Entrepreneurship (USASBE), and International Family Enterprise Research Association, (IFERA), as well as at community development organizations. The work has received best paper and best dissertation awards, and honorable mentions.

Impacts: NC 1030 and its predecessor, NE 167, have provided significant impacts in the understanding of both majority and minority family firms.

1) The first prevalence rates for home-based and for family businesses have been estimated, and were done in a manner that facilitates the ability to estimate the size of a specific market segment. Having valid prevalence rates has made it possible for NC1030 researchers to estimate the impact of potential changes on a segment of the economy as well as on individual firms. For example, if 50% of family business owners in 1997 had employed one more relative, they could have increased family business revenue by \$9.5 billion.

2) The importance of integrating family variables into the study of family businesses has been demonstrated. Between 1997 and 2000 over half of the businesses that closed did so because of the family rather than the business. Families accounted for 29.4% of the explained variance in family business annual gross revenue and 60.2% of the explained variance in perceived success. Family capital alone accounted for 28% of the explained variance in annual gross revenue. The effects of the family in the short run compounded over time and explained a greater proportion of the explained variance over the long run. Five aspects of families have proved particularly salient: family role of the business manager, family capital, family/business boundary management, race, and gender of the business manager. Family firms are rarely studied from the lens of race and gender.

3) Family capital makes significant contributions to family business achievements and sustainability. In the short run family capital contributes to gross revenue, but in the long run family capital contributes to the owner's perception of success. Adjustment strategies employed by household and business managers to cope with overlapping work and family demands were identified. Results show that surviving family businesses were those who were able to shift away from business work to spend time on family aspects and that balance between work and family

responsibilities is important in hectic times. Third, the committee has uniquely studied the intermingling of household variables in analyses of financial bootstrapping and use of owner resources between the family and family firm. Over 80% of families with both spouses working in the business intermingle family and business finances, and this intermingling continues well beyond start-up. Failure to track these resource exchanges makes it difficult to have a true picture of business success and family risk.

4) Family businesses consist of family members pooling their resources together to achieve a particular goal for the family. Goal orientation has been shown to affect family business performance. Specifically, setting a holistic goal for the business such as growth or a positive reputation with customers significantly and positively affected family business success. However, setting a specific goal such as profit did not have a significant effect on family business success. Goal setting and goal orientation are an important part of business planning activities that in the long run set the stage for family business success and should involve other family members.

5) Socially responsible business behaviors, such as commitment to the community, community support, and sense of community, contribute to the sustainability of family businesses in small rural communities. What the business owner and family do in the community have a positive influence not only on the community, but also on the family and firm.

Links to Extension and Outreach. The *multi function* attributes of NC1030 are well illustrated by its development of a set of 12 self evaluation scales and norms that have been tailored for use by home-based and non-home-based business owners and their advisors. Norms for business owners were established by NC 1030 using the representative sample. The home-based tools are included in “A Toolkit for Home-based Entrepreneurs” and have been disseminated through conferences, presentations, extension materials and websites. Findings are also being disseminated through websites such as Rural Minnesota Life (<http://www.cehd.umn.edu/FSoS/Centers/RuralMNLife/default.asp>) and <http://fcs.okstate.edu/microbiz> . Current disaster work will contribute new insights on business survival that can be incorporated into the Extension Disaster Education Network (EDEN) as well as entrepreneurial training in all venues.

Workshops and toolkits have been delivered for firm owners, and monographs have been coauthored with SBA researchers. Furthermore, the work has directly impacted that of private consultants to family firms, and entrepreneurial programs in states such as Oklahoma, Minnesota and Indiana. Three symposiums have been held in which the toolkit was presented to family firm owners. Publications are promoted online at university websites and the NC 1030 NIMMS website mentioned above. Findings of this research have also made their way into family firm classes offered on campuses around the country, and in some cases in other nations. Local seminars have been offered to firm-owning parents of university students at several universities (Purdue, Baruch, Stetson, Babson, St. Thomas) with significant input from NC 1030 members.

Mentoring. This committee is notable for involving graduate students, young colleagues, extension specialists, and colleagues at non-land grant universities in the work of the committee. For example, more than half of the committee’s publications included current and past graduate students of the committee’s member institutions. Some of the present committee members are the “third generation” and were mentored by the project founders. Family firms require succession plans for sustainability, and NC 1030 has exhibited the value of “succession”. The NC 1030 policy manual has been shared with other multi-state groups (NC 1013, 1011 and 1172).

Federal policy. An assessment of federal disaster funding impact on small business is part of the current project and publications are in review. Coauthorship contributions have been made to several SBA publications dealing with small business finance.

Impact on other research. The approach to the committee's research has also influenced family firm researchers in other fields. The Panel Study of Entrepreneurial Dynamics (PSED, University of Michigan) and the National Minority Business Survey (NMBS, located at Baruch College, CUNY) teams designed their surveys to parallel the NC 1030 questionnaires. Canadian and Korean surveys also have been designed to parallel the NC1030 questionnaire. The fruitfulness of these data sets has convinced the Kauffman Foundation and the Federal Reserve Board of Governors to include questions about the family in their study of businesses.

Community vulnerability. The committee created and used a unique measure of community vulnerability.

Funding: The funding of this committee was initially primarily agricultural, supplemented by donations and small institutional grants, much of which were pooled to fund data collection. Currently, the committee has obtained federal funding to support and extend its work.

Grants Funded:

Family Business Response to Federal Disaster Assistance. NSF. September 2006-August 2010.

Rural Community Resiliency: The Role of the Retail Sector in Easing the Effects of Slow Motion Shocks. USDA-CSREES-NRI Rural Development Grant, \$500,000, October 1, 2008 through August 2011.

Main Street Makeover Marathon, student outreach project and collaboration with Main Street Iowa Program, Department of Economic Development, \$13,336.

Intergenerational Transfers for Strong and Sustainable Farm Family Businesses. USDA-AFRI. Duration of Funding: 12/15/2008-12/14/2012. Total Amount of Award: \$485,127

Small Business Demise and Recovery after a Natural Disaster. NSF. \$417,583, September 2009-August 2013.

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