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**Annual Meeting Report for NC 1030**  
**Sustainable Families, Firms and Communities in Times of Change**  
**October 17-19, 2016**  
**Purdue University, West Lafayette, Indiana**

**Monday, October 17, 2016**  
**(Morning Session)**

Welcome from NC 1030 project Co-Directors: Linda Niehm, Iowa State University, and Yoon Lee, Utah State University.

Linda and Yoon: Overview of Meeting Agenda

We welcomed Bo Beaulieu, new Administrative Advisor (AA) for NC 1030. Bo serves as the Director of the Purdue Center for Regional Development at Purdue University. He has a wealth of experience and knowledge of USDA projects, research initiatives, and Experiment Station/Hatch/Multi-state projects. We thank Bo for his willingness to serve as our AA and we look forward to working with him on the new NC 1030 project.

Dawn Parks, Assistant Director of Sponsored Program Development, led a lighting session on “Grant Funding Sources for Family Business Research” and “Collaborative work to get grant funding”.

Glenn: Announced retirement in December 2016; will provide some limited support and involvement to NC 1030 as needed to finalize papers and presentations where he is a co-author.

Margaret Fitzgerald: Announced she will be stepping down from NC 1030 since she has been named Dean of the College of Human Development and Education at North Dakota State University. She will help to finalize a paper from the North Central Regional Center for Rural Development (NCRCRD) grant and a related webinar. Linda Manikowske will replace Margaret as the NDSU technical representative. Congratulations and best wishes to Margaret!

**Monday, October 17, 2016**  
**(Afternoon session)**

The afternoon session began with the NC 1030 Business Meeting. Sandra Sydnor of Purdue was nominated by Virginia Zuiker and approved by Cindy Jasper of Wisconsin as new Secretary of NC 1030. Linda Manikowske (North Dakota State University) was nominated by Diane Masuo of University of Hawaii and approved by Yoon Lee of Utah State as Social Media Chair. The Social Media Chair will establish a LinkedIn page and to oversee monthly updates of NC 1030 activity.

Discussion occurred regarding the 2017 NC 1030 annual meeting. It was approved by the group that the next annual meeting will be held on October 11-13, 2017 at the University of Missouri-Columbia (fly into Columbia). Wednesday will be a travel day and the meeting will conclude with dinner on October 13 at 5:00pm.

Members were asked to review objectives for the new 5 year NC1030 project, Sustainable Families, Firms and Communities in Times of Change.

Note in particular that the new project takes an expanded view of impacts on community. Members were asked to also review the new Wave 4 survey instrument, items, code book, and data file shared with NC 1030 members on Google Drive. Linda Niehm conducted a walk-through of the Wave 4 data collection. This wave of data collection was funded by a North Central Regional Center for Rural Development (NCRCRD) grant titled Family Business Contributions to Sustainable and Entrepreneurial Rural Communities over Time. Co-PIs for this grant from NC 1030 are Linda Niehm, Glenn Muske, and Margaret Fitzgerald.

Linda and Yoon encouraged all NC 1030 members, especially those at institutions impacted by retirements and/or changes in faculty positions, to focus on recruitment of new members with expertise needed for our family business research efforts. Please actively seek out potential new members in your networks and university circle of contacts. Your help in this matter is essential and much appreciated.

### **Tuesday, October 18, 2016 (Morning Session)**

Sandra Sydnor introduced Rich Ghiselli, who is a professor and department head of Hospitality and Tourism Management at Purdue University. Maria Marshall introduced Ken Foster, who is a professor and department head of Agriculture Economics at Purdue University. Both provided a welcome and overview of their program areas and discussed topics and initiatives of relevance to NC 1030 research.

Diane Masuo asked all 1030 members to review updates she had emailed for the Policy Handbook by end of the day Tuesday. A vote on the updates will follow.

Maria Marshall and Holly Schrank of Purdue provided updates and extended discussion on the disaster data set.

Linda and Glenn led a discussion on identifying potential topics and funding opportunities for the group. The conversation began with how we must position our funding activities from a small business perspective and building capacity for rural businesses and communities. Next, Linda and Glenn lead the group in visioning for grant writing to support NC 1030 research. General topical areas were discussed and identified. It was determined that the NC 1030 members would divide into topic driven grant writing teams. Each team was tasked with identify 2 grants and 2 researchable topics.

The following NC 1030 grant writing teams were determined with group leaders identified. Each team is to determine potential topics/funding agencies from which to develop possible grant opportunities and provide a Plan of Action report in late January/early February during a conference call. Linda will organize the call and send out related information in January. Team leaders should continue discussion on their own with their respective team members. The grant writing teams and topical areas are:

- Smart and Connected Communities (NSF-Glenn, Linda M., Diane, Linda N-leader, Cindy)
- Rural prosperity (NIFA-George, Maria, Yoon-leader, Renee)
- Women/minority/LGBTQ businesses (SBA-Corrine; Sandra, Virginia-leader)

**Tuesday, October 18, 2016**  
**(Afternoon session)**

Sandra Sydnor discussed conference presentations, journal publications, and special issues in which NC 1030 should engage to create visibility and reach for our research and expertise. Please see the Conference/Journal document in the NC1030 Google Drive folder for possible journals.

It was also discussed that NC 1030/Purdue Initiative for Family Firms (PIFF) would co-sponsor a family firm research conference. We will submit a proposal for a USDA Conference Grant. Maria, Linda, and Yoon will work on a draft of this proposal and send it to everyone early in 2017. Other 'Calls for Papers' and Special Journal Issues were also discussed.

Linda initiated discussion regarding the 2 new theoretical frameworks included in the new NC 1030 project. She emphasized that these perspectives complement the sustainable family business theory (SFBT) research frameworks and include: Flora's Community Capitals Framework (Corrine Valdivia from University of Missouri), and Morris' Entrepreneurial Capabilities Framework (Linda Niehm, Iowa State University).

Linda and Glenn reviewed the information in the 2016 Codebook for the Wave 4 data. Glenn and Linda noted that they had just received the data in the last couple of weeks. Linda would like team members to leave this annual meeting being familiar with the variables and ideas that are researchable for a paper from the data. The sample is not large for the Wave 4 data but there are some open-ended questions with interesting comments.

**Wednesday, October 19, 2016**  
**(Morning Session)**

We started the meeting with a conversation led by Bo Beaulieu, our new AA, about activities and initiatives going on in the North Central Region. Bo's presentation was supported by a Power Point.

**The following topics and grant funding sources were suggested by Bo for the NC 1030 group:**

- How to connect family firms to regional (multiple counties who are interdependent) level economies?
- How do we connect our family firms to innovation clusters?
- Leveraging the [Workforce Innovation and Opportunity Act](#)
- Investigating opportunities with the [EDA](#)

From 10:30am – 12:00pm, noon, individual NC 1030 members partnered in sub-committees to discuss and work through new and ongoing research activities.

The meeting adjourned at 12:00pm, noon.