

Joining the Family

Attributes to support integration into a family farm business

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1 Executive summary

Family farming businesses contribute to a large proportion of the total number of agricultural businesses in New Zealand. But given the level of their significance very little focus is put on how family businesses function to remain harmonious, strengthen and grow. The small amount talked about is largely focused on governance and succession planning and predominately from the perspective of the older generation. This report looks at the family business from a different angle, that of a new family member joining a family business as a daughter or son in-law to understand what attributes are required to successfully integrate into a family farm business.

Initial research and articles relating to in-law integration into a family business identified that limited attention especially in a farming context has been placed on the role and impact both to the individual, family and business but recognised it was a unique and challenging position. Further reading specific to in-law relationships in an overseas farming context followed by identification of factors that contribute to effective and happy families influenced my direction and focus. The aspects needed by the individual daughter or son in-law and how the overall family functions.

The true learning really happened at the interview stage when four family members and three professionals shared their experiences, knowledge and insight into what contributed to smooth integration. Many of the research themes were echoed by the participants but what really stood out was the commitment required and that integrating into a family business is a journey that one is on for a life time. Becoming part of a family and business is a constant evolution and involves continual learning and application.

For that reason, the attributes which have been identified in this report are timeless and can be adopted at any stage of the journey. At the heart is to remain values focused - living a life aligned to what is important to you. Second, to maintain a strong and connected spouse relationship. From there stems prioritising understanding time, developing conversational confidence, remaining agile, practicing self-care, having fun and being creative and recognising change can start with you.

The attributes of joining a family business are aimed at supporting those assuming the daughter or son in-law role but to achieve a truly harmonious integration into a family business it takes commitment from all the family members. I therefore believe many if not all these attributes are worthy of attention by all kinfolk involved.

My wish is this report ignites a willingness to create a culture that focuses on commitment, support and encouragement towards and within family farm businesses to ensure they remain sustainable and harmonious now and for future generations.

Attributes of harmonious integration into a family business



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- Finally, my three gorgeous kids. Harriet, thank you for your accountability, reminding me that "I should have written more than one page by now". Charlotte for using up all my post it notes and highlighters for your creations so I could no longer mark my pages and George for always asking me to "come play with me".

Right from the start this project has been motivated by the fact that one day the time may come where you create your own family, become part of another family or introduce someone to your family. I know that the foundations you create today will support you in what your future will hold.

“You can’t have the family farm without the family” - Gilbert K. Chesterton

Family and farming are two of the most fundamental building blocks here on planet earth. Family is what shapes our society and farming provides society with the nutrients to survive. Neither comes easy and both require a huge amount of passion and dedication to thrive. When we combine family, and farming together double the amount of passion and dedication is needed. This can lead to immense success or high levels of conflict.

As a daughter growing up in a farming family, a daughter-in-law involved in a multigenerational family business and a mother, I have experienced first-hand the balancing act required as you navigate your way through understanding how your skills and aspirations can interweave with those of your own family, the wider family, and the farming business.

My observations are that all family farming businesses have a common thread in that they are made up of a diverse range of people. And it is the people who will determine the pathway family farming businesses will travel.

Most family business experts say that the critical issues facing family business enterprises are people issues, more so than business issues.....It is “people power” that determines the success of a business. Similarly, it is the failure to address the people dimension and family dynamics that has proved to be a major hurdle in achieving success in many succession processes! – Owen Cooney, 2011

If this is the case, are we putting enough focus on the people element of family farm businesses? How strong, happy and successful could our family farms be if we put as much emphasis on understanding the people as we do on the business and production aspects.

I have chosen to address the people dimension by exploring what it takes to successfully integrate as a new family member into a family farm businesses. The focus is mostly from the perspective of ‘marrying’ (life partnership) into a family farm business as a daughter or son-in-law but valuable insight exists for other family members from the areas covered.

The research question asked is “What factors ensure successful integration into a family farm business?”. Are there common themes which emerge amongst families around the way they welcome, transition and involve new family members in the farming business to ensure family, business and individuals flourish? If so what are these traits and can others adopt them whatever their situation?

My hope is that I provide that common insight into how harmonious farming families operate and the choices they make in relation to generational integration.

4 Literature review

Farming's In-Law Factor – How to have more harmony and less conflict on family farms (Froese and McKenzie, 2014) has formed the basis of this literature review due to the limited amount of literature and research in this topic. Relevant content has been identified and defined in a New Zealand context.

4.1 Why can integration into a family farm business be a challenge?

The intent of this research project was to keep an upbeat and positive approach to integrating into a family farm business. However, there is a high degree of acknowledgement that a lot of challenges exist and many a war stories to be told by young and old. It is therefore important to bring to light the issues that may be at play and contribute to things not functioning well.

4.1.1 Different perspectives

“Where we come from and our life experiences shape how we see the world” - M. McKenzie, 2014

Every person has their own set of customs that form the way they live, behave, interact and view themselves. These are shaped by life experiences, where they come from and who has influenced them. These norms and behaviours also exist within family, religions, industries, regions and countries. This is what creates a culture and provides the written and unwritten rules of what we can expect from each other.

Some people are attracted to or meet people for whom they share many similarities such as both growing up on a farm, living in the same region or country and being raised in similar family environments. For others, their life partners background could be opposite to theirs and their family. They might be from another part of the world, limited exposure to farming and business ownership or a family with different dynamics and values. If a new person comes into a family with a new perspective, their own values, a different way of looking at the world, a way that could be very different to the existing family, tensions could arise if not well managed.

4.1.2 Evolving rural culture

In the book *Farming's In-Law Factor* (2014) a strong emphasis is put on recognising the uniqueness of family business in a rural context. Most research and opinion around family business is done from an urban context. Although many principles apply there is the need to explore and understand the uniqueness of family farm businesses.

Historically rural societies have been predominately 'high context' cultures. Value is placed on the people you know or are connected to, time is flexible and there is a strong sense of supporting one another with relaxed hospitality. Relationships tend to be more long-term, traditions are valued, elders are respected

and communication is often formal or indirect. A 'low context' or 'urban' culture tends to focus on individualism, time and outcomes. Communication is informal, direct and words mean what they mean. Privacy is valued and hospitality is more planned. Focus is placed on the capabilities of a person rather than connections.

As young people, New Zealand and the world become more urbanised and travelled rural communities are becoming less traditional. The younger generation coming back into family farms have spent more time away in low-context environments and these characteristics are becoming more valued. This can present challenges between generations, rural and urban people or those from other countries coming into rural located family businesses.

4.1.3 Joining a new family system

When a daughter or son-in-law joins a new family either through marriage or as a life partner they become exposed to a new family system, unwritten rules and a way of doing things. Depending on the length of relationship and involvement with the wider family, this new family system may be familiar or very foreign territory, aligned to their own family or remarkable different. Examples of unspoken rules identified by McKenzie and Crohn (2014) (and adapted by report author):

- Value and importance of education and lifelong learning
- Commitment and priority of time towards farm versus family
- Value of money, debt levels and how allocated between business, family, home, pleasure
- Gender roles within the home, family, business and career
- Level of information shared outside the family and business
- Dealing with conflict, fighting and debating versus rational and calm discussion
- Parental authority versus all family rules are negotiated
- Willingness or not to adapt and change
- Double standards between generations or siblings
- How mistakes are managed or viewed
- Utilising outside expertise and specialist
- Holidays, family occasions, milestones, celebrations, traditions and time off
- Sickness and asking for help, supporting others when in need
- Communication patterns
- How children are raised

4.1.4 Creating a new family unit

If family farm business integration has come about at a time when a new relationship or marriage has occurred it also coincides with the formation of a 'new family culture' (Figure 1). Bringing together the origins of two families, holding on to chosen traditions and ideals, embracing those of the spouse's family,

letting go of others and developing new ways together that will ensure a healthy relationship and a positive and nurturing environment for any children.

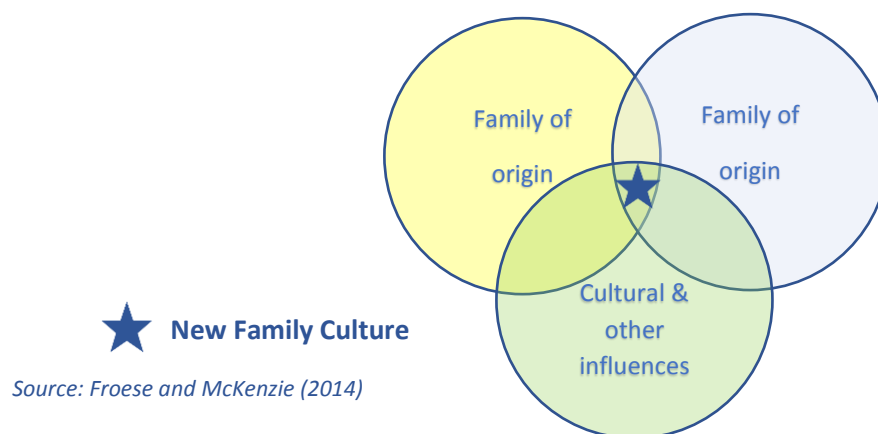


Figure 1: New family culture

4.1.5 Living in the business and living near the family

One of the most unique and “further peculiarity of agriculture as an economic sector is the welding together of the farm enterprise and the family household in a single entity” (Woods 2001, 216). By entering an intergenerational family farm business, it likely means living at the location of work and close to family members. The farming child is also therefore nearer to their birth family, community and networks. This arrangement necessitates the son or daughter in-law to build a unique bond with new nearby family. For well-functioning families, this will not pose too much of a problem but “conflict occurs when this “dance” of give and take gets out of step (McKenzie, 2014).”

4.1.6 Workload

Although more focus is being put on working conditions and hours in the primary sector, farming is by no means a job with regular work hours. Workload is extremely seasonal requiring long days, nights and weekend work. Family breaks and time away can be challenging and occur outside traditional times. Busy periods can mean one partner is not available to assist with children or around the home and family time is had ‘out on the farming helping’.

Historically importance has been placed on ‘how hard you work’, younger generations are taking a different approach as identified in an article ‘10 Things Millennial Farmers Want’ by Elaine Froese. Included in the top five where to use their head more than their back, to have a life and the freedom & independence of farming.

4.1.7 Education

Farmers are increasingly completing post-school qualifications as primary industry businesses demand good technical and business skills. New Zealand women are now more educated than males, with six out of the ten people who gain tertiary certificates, diplomas or bachelor degrees and above being women. Women now represent 54% of domestic students completing qualification in primary industries (agriculture, environment and related studies). This is up from 41% in 2009. Those entering a family business are likely to be joining with skills, off-farm experience and ideas to significantly contribute to the advancement of the business. It then becomes a balancing act of valuing the wisdom and farming experience of the older members and giving voice to the innovation and fresh set of eyes of younger generation.

4.1.8 Money, Money, Money!

Being a farm business owner likely means that income fluctuates throughout the year, can be extremely seasonal depending on the industry and is highly influenced by external factors such as weather and pricing. Add to this long term and seasonal debt and you have a pressure pot of financial decisions constantly needing to be planned and managed. Quite a change if you come from a family or career accustomed to regular income and a conservative approach to borrowing.

4.1.9 Off farm employment

'Working off farm' is now a permanent and common feature for family farm businesses in New Zealand. Research is limited in New Zealand but in Australia 50 - 60% of Australian rural families are engaged in off farm employment. In New Zealand financial gains are cited as being the most significant reason as were individuals wanting to follow a certain profession or occupation, an inclination to enhance their lifestyle, and a desire to get off the farm to interact with others (Weir. P, 2016).

For those entering a family business and choosing to work 'off farm' it can put a strain on personal, family and farm business commitments, time for community engagement all the while managing expectations of the older generation who may have not had those choices or opportunities.

4.1.10 Concoction of 'stressful' events

It should not be over looked that when a new member joins a family business there is a melting pot of significant and potentially stressful events that take place all at once or over a period for both the new and existing generation. The Holmes Rahe scale (Figure 2) lists what has been researched as life events having the highest correlation to illness due to their level of stress. Each event has a corresponding Life Change Unit depending on how traumatic it was felt to be by a large sample of participants. Highlighted are events potential occurring during family business integration.

Life event	Value	Life event	Value
Death of spouse	100	Foreclosure of mortgage or loan	30
Divorce	73	Change in responsibilities at work	29
Marital separation	65	Son or daughter leaving home	29
Jail term	63	Trouble with in-laws	29
Death of close family member	63	Outstanding personal achievement	28
Personal injury or illness	53	Spouse begins or stops work	26
Marriage	50	Begin or end school	26
Fired at work	47	Change in living conditions	25
Marital reconciliation	45	Revisions of personal habits	24
Retirement	45	Trouble with boss	23
Change in health of family member	44	Change in work hours or conditions	20
Pregnancy	40	Change in residence	20
Sex difficulties	39	Change in schools	20
Gain of new family member	39	Change in recreations	19
Business readjustment	39	Change in church activities	19
Change in financial state	38	Change in social activities	18
Death of close friend	37	Mortgage or loan of less than \$100,000	17
Change to a different line of work	36	Change in sleeping habits	16
Change in number of arguments with spouse	35	Change in number of family get-togethers	15
Home mortgage over \$100,000	31	Change in eating habits	15

150 points or less = a relatively low amount of life change and a low susceptibility to stress-induced health breakdown

150 to 300 points implies a 50% chance of major health breakdown in the next 2 years

300 points or more, raises to 80% chance of health breakdown in the next 2 years, according to the Holmes-Rahe statistical prediction model

Figure 2: Holmes Rahe Scale. Source: The American Institute of Stress (2017)

As an example, if a couple joined a family business due to the death of a family member (63), resulting in a change in financial state (38), different line of work (36), spouse or partner having to change or stop work (26) and move to a new house (20), that comes to 183 points. If a person has 150 to 300 life change units they have a 50% risk of a health breakdown in the next 2 years.

4.2 In-law positions in the family business

Integrating into a family business is a journey, which evolves over time and through a series of stages. In my research, I was keen to find a way of visually representing this journey specific for an external person joining a family and then becoming involved in management and/or ownership of the family business.

4.2.1 Where do I sit?

The 'Overlap of Family, Ownership and Management Groups' is a well-documented visual representation of the benefits and disadvantages for owning families, nonfamily employees and family employees (Tagiuri and Davis, 1996) and the general complexities that come about by combining family and business.

This begged the question, where are in-laws represented especially in the initial stages of relationships. A study 'The Family in Family Business: Case of the In-Law in Philippine Business' identified from their findings that the in-law had no position in the current model of Tagiuri and Davis and necessitated a forth but temporary circle around the family circle (Figure 3) (Santiago, 2011).

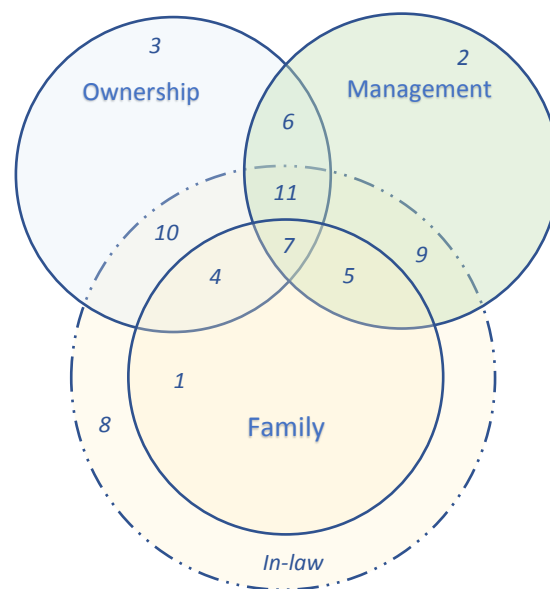


Figure 3: In-law position in family business

How families embrace new family members is very dependent on family's culture and personal experiences and relationships. Some may be very guarded and protective or fear the implications of a relationship breakdown and divorce. Families who embrace new members immediately mean in-laws will move from 8 to 1 and the temporary circle will disappear. Treating them with the same love, expectation and conditions as any blood family member.

Each in-law and family will follow their own path moving between positions over time if they become involved in management and ownership of the family business. With each movement, a different set of 'rules' will govern his or her role and relationship with the family and business. Santiago highlighted that the key is for families to develop open and clear communication to ensure expectations and boundaries are

clear and future pathways are determined based on financial viability, skill set, interest, willingness and contribution being valued and rewarded.

4.3 Resilience and happy farming families

At the completion of the first stage of my literature review it became apparent that the degree to which family's function is likely to have a huge impact on whether the integration into a family business is a positive or negative experience or works out well or not. The focus then turned to identify what contributes to well-functioning families and to a degree how would a successful family act or operate.

4.3.1 The 7 habits of highly effective families

The 7 Habits of Highly Effective Families (Covey, 2017) applies the 7 Habit principles to family life. In the books opening sentence Covey states "Good families – even great families – are off track 90 percent of the time! The key is that they have a sense of destination. They know what the 'track' looks like. And they keep coming back to it time and time again.... Hope lies not in the deviations but in the visions, the plan and the ability to get back on track."

Effectiveness is described as – a beautiful family culture, the spirit of a family, depth, quality and maturity of relationships, the way family relate and feel about one another. Cultivating and nurturing a 'me' to 'we' culture. Covey encourages families to take a learning together approach and to keep in mind the miracle of the bamboo tree, for the first four years once the seed is planted you see absolutely nothing and in year 5, an eighty-foot tree appears. The 7 habits summarised are:

1. Be proactive

People are responsible for their own choices, and have the power to choose, they develop and use their four unique human gifts – self-awareness, conscience, imagination and independent will and take an inside-out approach.

2. Begin with the end in mind

Families shape their own future by having a clear vision and purpose of what you and your family are all about. (In its highest form this is a family mission statement)

3. Put first things first

Families organise and execute around their most important priorities as expressed in their mission statement, they have weekly family times, regular one – one bonding and are driven by purpose.

4. Think "Win-Win"

Family members think in term of mutual benefit, foster support and mutual respect.

5. Seek First to Understand Then to Be Understood

Listening with intent to understand the thoughts and feelings of others, then seek to effectively communicate their own. Building deep relationships of trust and love. They give helpful feedback.

6. Synergize

By respecting and valuing one another's differences, the whole becomes greater than the sum of the parts. Building mutual problem-solving and opportunity seizing culture. It is not compromise or cooperation but creative cooperation.

7. Sharpen the Saw

The effectiveness of all six habits are increased through regular personal and family renewal in four basic areas of life: physical, social/emotional, spiritual and mental. Done by establishing traditions that nurture the spirit of family renewal.

4.3.2 The Secrets of Happy Families

American author Bruce Feiler set out on a three-year journey to find the smartest solutions and most cutting edge research about families. Asking the simple question: What do happy families do right and how can the rest of us learn to make our families happier?

1. **Adapt All the Time** – You must be agile. Your family has to be capable of evolution and change. Whether that be weekly family meetings to evaluate how your family operates or the techniques use to discipline, entertain or inspire your family.
2. **Talk. A lot.** – From mealtime to long car rides, from disputes between spouses to showdowns amongst siblings, from money to sex, a key ingredient of successful families is the ability to communicate effectively. A happier family spends time crafting, refining, and retelling the stories about the positive moments and how they bounced back from difficult ones.
3. **Go Out and Play** – Make fun, playing games, taking holidays, invent goofy traditions, whatever makes you happy doing it with other family members will make your family happier. Happiness is a consistent activity.

4.3.3 Resilient Farming Families

Farming's In-law Factor identified eight characteristics of resilient farming families, recognising that in farming you are faced with physical challenges (weather, machinery, livestock) and interpersonal annoyances or 'soft issues', but it is a family's ability to bounce back, be flexible, cherish family member's individuality and recognise that the choice is with you - is the hallmark of the happy family. Unhappy families tend to be fixed in patterns of responding and in non-negotiable positions - they get stuck.

1. **It's OK not to know everything:** Resilient people are willing to admit they don't know it all. They have a keenness to learn new things with enthusiasm, seek wisdom from mentors, read, attend training and learn from others who have different approaches and perspectives.
2. **Admitting the need for improvement:** Resilient farmers are open to innovation and have room to improve. They retain what is working well, but are not threatened by the need to change their ways or let go of what is not working. They understand the huge range of possibilities for what farming could look like.

- 3. Communicating clearly with farm team members about expectations:** Resilient families talk about financial risk-taking, farming practices, life/work balance, and distribution of work. There are clear boundaries about entitlement. The succeeding generation understands that it is their parents' decision as to the distribution of assets and the founding generation is fair in giving compensation to the younger generation for work done.
- 4. Total farm team awareness of farm finances, business strategy and vision:** The depth of financial awareness varies with the key players, depending on their roles but everyone needs to know they are part of a viable, profitable and successful operation and have a general awareness that the farm is sustainable and is going in a direction they are comfortable with. It is important each family unit have control of their own personal finances.
- 5. People who can bounce back quickly practice good self-care:** It is important to take care of yourself and not burn out by taking time off when you are sick, setting limits on work hours and reducing the things which cause stress or pain.
- 6. The importance of taking time with friends and community:** Nurture relationships with others. Social and emotional support networks are important and essential. Friends and community are great for fun, relaxation, renewal and leisure activities. They provide an excuse to get off farm, share joys and frustrations and improve our sense of well-being and frame of mind.
- 7. Positivity and taking things in stride:** Have a streak of optimism and keep things in perspective. Be able to imagine what the situation might look like through the clear lens of hindsight.
- 8. Strength and consistency of emotional support between spouses –** Make time together for fun and conversation to keep your relationships strong. The farm is only as solid as the relationships that sustain it. When decisions are made for the farm, couples need to have discussed things and worked out their own issues to have a united front.

All three sources hold common themes, a willingness to be open to change and adaption recognising that change is the only constant, regular open communication across all family members, working together for the better of everyone and a making time for fun and enjoyment. To my surprise the most simple and powerful message was to make conscious decision to want a happy and effective family and taking proactive steps. Bruce Feiler sums this up well in the last sentence of his book.

What's the secret to being a happy family? Try.

5 Methodology

5.1 Introduction

To gain a first-hand understanding of experiences and insight of integrating into a family farm business a range of farming family members were interviewed along with professionals specialising in family coaching, succession and facilitation. A semi structured qualitative approach was used to gain their perspectives while ensuring the relevant context was brought into focus.

5.2 Defining the sample

Farming family members

The following criteria was used when selecting family farm business participants:

- Family business history spanning 2+ generations
- Actively involved in management, ownership or governance of family business
- Male or female
- Pastoral farming (sheep, beef or dairy)
- Involved in community and industry initiatives
- Regarded as good performers in the sector they operate

Professionals

Professionals were identified through existing networks and those recommended by colleagues and industry leaders whom I canvased early in the research phase. Professionals were all widely known, respected and had a minimum of 10+ years supporting family businesses.

5.3 The interview

Interviews were conducted where possible face-to-face otherwise over the phone. Interviews lasted between one to two hours and followed a flexible line of questions depending on the context of their situation to the research topic. Focus was on allowing participants to 'tell their story', share their thoughts, experiences and learnings.

Note: The focus of this research is on defining what successful integration into family farm business looks like. Using a qualitative research study has allowed me to gain a deep understanding for each participant's situation and their views but does not reveal how widely these experiences and perspectives are held amongst the wider farming sector.

Summary of interview respondents

Family farm business member	
Daughter in-law (Sheep & beef)	Governance role in husband's family business which includes parent's in-laws, brother & sister in-law and extended family.
Daughter in-law/daughter/sister (Sheep & beef)	Farming in partnership with husband, sister & brother in law. Previously farming with parent in-laws.
Father (Dairy)	Farming in partnership with wife. Wider family business involves son in-law, daughter, son and daughter in-law
Daughter in-law (Dairy)	Farming in partnership with husband, parent in-laws, brother and sister in-law.
Professional	
Facilitator & coach	Succession, business & strategic planning, team culture development, coaching and navigational conversations.
Facilitator & coach/Family farm business owner	Facilitation and training, business & strategic management, mentoring and coaching
Facilitator & coach/ Farm business owner in equity partnership	Facilitation, business administration, coaching

6 Participant findings and general insight

The experiences and thoughts of family farming members and professionals are analysed and summarised in this section. They have been grouped into key themes with verbatim quotes used to further exemplify the themes which emerged.

6.1.1 Personal and family values

Values are defined as our principles or standards; one's personal judgement of what is important in life, an expression of our inner most truths and beliefs. The literature review had identified underlying values as key to how we act and the way we see the world, so I was interested to know what clarity and alignment the participants held for their own personal values and those of the family. Two of the families had formally communicated their values through a structured process, for others they were unspoken but easily recognised and aligned.

- » *As a family, we spent a lot of time developing a vision for the next 5,10, 20 years for what we wanted for the business and personally and to find common ground. The key was we were all involved. It was done over a year, it took time. We had several face to face meetings, leaving the meetings, digesting and then coming back. We openly discussed what was negotiable and non-negotiable.*
- » *We understand each other's values, we are hard workers, that has been installed in us from a young age.*
- » *The values of our respective family are very similar which is probably why I fitted in very easily, we are raised fairly similar and share core values.*

Professionals were very clear about the importance of identifying and communicating the core values of the family.

- » *By understanding and sharing your core values you are allowing insight into what you are thinking and what is important to you.*
- » *How aligned are our values? By identifying your core values, you can understand how aligned they are and if they are not understanding it is going to be harder and take more effort.*
- » *You almost need to be inducted into a family and articulate the 'unwritten rules' that cause grief, especially if they are linked to one's values. If so you need to have those discussions.*

6.1.2 Awareness of others

Through the literature review a theme also emerged around the importance of recognising that we all come from different places, see the world differently and are individual personalities. The participants were asked about the importance of understanding others and how they do that. There was a high degree of consciousness of others amongst those participants and acceptance of who people are.

- » *You need to allow ‘understanding time’. Spend time with them. Learn how they work. If I get upset about something related to the business I talk to my husband and decide how we should approach it. Or I call my mother in-law and she supports me in how to work through it with my father in-law.*
- » *It is important to share the family tree and talk about how they came to be the current land owners.*
- » *I was very aware of how the family managed relationships and the importance of getting along, if you don’t get along with the family it is very hard for the family and partner.*
- » *I am careful how I approach certain topics, the parents are very traditional around gender roles, I come from a family where parents were an equal team.*
- » *My mother in-law had a hard time with her in-laws so she has been very aware and supportive.*
- » *At the end of the day it all comes down to people and personality’s.*

One of the professionals gave examples of questions used with families to get to that deep level of understanding.

- » *Asking questions like “What was it like for you”, understanding what their journey was like, what have they had to put up with, allow them to share their challenges, fears and goals, what would they like for their daughter/son in-law?*
- » *Listen, ask the questions to help understand the resistance. Be able to notice, understand and manage the emotions.*

6.1.3 Self-responsibility of behaviour

Being proactive and responsible for the way people acted within a family business came through in two circumstance’s, the first were two participants who had adult children and at the stage of welcoming new family members into their business, both had made very conscious decisions about being pre-emptive.

- » *I have seen the good and the bad with our two families and have a passion to do it right for mine and others.*
- » *My motivation stems from my experience as a son in-law, it made me quite aware of how challenging it can be coming into a family business.*

The younger participants put a lot of emphasis on having self-awareness and being responsible for their actions and words and showing leadership in their given roles within the family.

- » *It is important to recognise that you are making the decision to put yourself in this situation, only you can change the way you respond to them.*
- » *The better you understand yourself, the more you are likely to understand others.*
- » *How we value ourselves determines how we value others.*

- » *It is about being part of the strategic conversation and choosing a different way for ourselves, it can be a choice.*
- » *It is about stepping up and putting yourself in their shoes.*
- » *It is important to be patient and earn your stripes, you can't go charging in, it can be very volatile when dealing with family business.*

One professional uses the 'above the line/below the line' framework for self-responsibility when working with family businesses and stated:

- » *We can't always choose what happens to us, we can though, choose our response i.e. how we think, what we say and what we do. Our choice to play above, or below the line. The results of which are significant on our effectiveness, influence, well-being and performance.*

One professional gave an example how the older generation can view self-responsibility by asking them this simple question:

- » *For the older generation, it is important they ask themselves "how would I like to behave?", not just acting out what happened in the past.*
- » *One of the biggest failings I see is the attitude of parents to their new son or daughter in-law and the parents not taking responsibility for their behaviour.*

6.1.4 People are valued

For most participants, it was clear that when they began their involvement with the family and business their skills, knowledge and capability were valued or acknowledge. The decision or opportunity to enter the business was done transparently across the wider family and aligned to their interest or skill set.

- » *I never presumed I had a formal role but was hopeful. The family acknowledged that my skill set was beneficial to the business and formalised a role for me. My skills where embraced by the family and not seen as a threat.*
- » *My father in-law drove it from the start, being open to negotiation and discussion with all members of the family as to what role they wanted to play.*
- » *My in-laws value what we (daughter in-laws) have put into the business (time/effort) and want the next generation to succeed.*
- » *We set up a trust to protect the equity my husband (son in-law) put into the business when we went into partnership with my sister and her husband.*
- » *I accept the talents and personalities of my children and their partners and make use of them. We include them as much as they are willing to include themselves. It is not forced on them.*

- » *If you get involved in a family business it is hard if you don't have input into something, I think it is important to have something you can drive and that gives you the confidence to have conversations around the table.*

Professionals saw valuing people and what they bring a responsibility of both generations, the younger in-laws needed to be realistic about the roles available or viable and how well suited they were to those roles, while the parents needed to be open to understanding the capabilities of new family members.

- » *It is important for families to acknowledge the skills, knowledge and involvement they could have.*
- » *New family members need to ask the question, "Is there a role and is it going to be valued, what could I do, are my skills understood, what's getting in the way of them not being understood?"*
- » *Parents are in a high-power base position, daughter/son in-laws are in a low power base position and they need to be aware of that. There is a responsibility of the parents as to how they can embrace the daughter or son in-law, build on their skills and the strength that they bring – value what they bring.*
- » *It is important to be clear on roles to remove ambiguity.*
- » *Partners often feel they have good skills but they are not valued by the family making it hard to find their space.*
- » *I think parents (mostly mothers) sometimes need to see the relationship they have with their son or daughter and is this new family member (daughter or son in-law) something that is a threat or do they add to them.*

6.1.5 Spouse relationship

Having a strong, open and respectful relationship with their spouse was a common theme amongst participants, whether it was to enable them to pursue what was important to them, assist with communicating thoughts to the wider family or a general sounding board.

- » *If there was something we weren't happy with it would be communicated via my husband and we would approach the family as a partnership.*
- » *My husband is very support of my off-farm commitments and helping with the kids when I am away.*
- » *My husband and I do a lot of talking about the family and the business.*
- » *Because of the role I play in the family business we are both O.K. if I must challenge my husband at meetings, we have talked about it a lot and both recognise it will be because of what is best for the business.*

When one professional was questioned on the reverse, what role the daughter or son in-law should play in supporting their spouse.

- » *A really important role for the partner is supporting the husband or wife in communicating the right thing to the family. They often find it hard to get out how they are truly feeling and say it in the right way to their family. Helping them get those words out is valuable.*

6.1.6 Communication

All families interviewed had formal communication practises in place, it was clear that by doing so they took comfort in the fact that it set up a safe and regular opportunity for all members to participant in business discussion and decisions and if there were issues they wanted to bring to the family this was the time to be able to do it.

- » *The family business members have monthly management meetings via video conferencing, 2 board meetings per year and 1 strategy meeting. The chairperson is rotated. Everything is very fluid and ongoing, we are always open to discussion and ideas as a family. Having regular communication means you know the times when things can be discussed.*
- » *The family business has weekly management meetings, monthly board meetings. There is a lot more formal business planning done, it is about creating a process that has longevity and enabling a formal process to become normalised.*
- » *As a family, we have three meetings a year and regular communication via emails. I am very open with information, that is how you learn.*

One professional set the scene in our interview with their approach to communication

- » *Through my observations with my own family and supporting other families, I really encourage families to see generational transition and succession as a process that never ends. It is not an event but part of the family businesses strategic plan and one part of how we make the business sustainable. If we view it as an ongoing process it removes the fear and it becomes a gradual transition.*

One professional went further in-depth around the area of courageous conversations which were quoted as being “the ones you don’t want to have but you know you really need to”.

- » *There are always going to be challenges and courageous conversations that need to be had, prepare for them, set them up so they don’t end in tears. Don’t enter with fixed outcomes or be frightened.*
- » *It comes down to the traits of humanness, honesty, respect and empathy, if your intentions are well thought through and from the right place, you are probably not going to go wrong.*

6.1.7 Independent advisor/facilitator

The families all utilised an independent advisor in varying degrees and stages within the family business. This was particularly important when generations transitioned between management or ownership. It was also mentioned by one family the importance of allowing the younger generation to have an external mentor be it neighbour, uncle or consultant as someone they can throw ideas at that is outside of the family business.

- » *We created an advisory board, it enabled us to take the emotion out of the challenging conversations, someone can ask the tough questions.*
- » *My father took the neutral role but when dad died it added emotional stress and it was important that we had someone independent to provide an objective view.*
- » *We had an independent advisor facilitate our monthly meetings between the two families. We each had time one on one with them and then all together as a group. The advisor could deliver the message, it preserved the family harmony.*
- » *It is about each family member developing conversational confidence.*

The professionals saw their role as helping families work through what they wanted, removing the emotion that can be a blocker and facilitating those hard discussions.

- » *Leading a discussion that connects to the emotion drivers, creating the appropriate tension and embracing a collaborative approach.*

6.1.8 Family fun

The literature which was reviewed on what makes happy and effective families placed emphasis on having fun as a family, it seems no coincidence then that participants placed a lot of value on spending time with family.

- » *We try to go on one wider family holiday a year, it is a combination of pleasure and business.*
- » *We never talk about business at family events where other non-business family members are present. We try and go away every year as a family, we have a family fun fund.*
- » *We play together a lot, have hobbies. When we are out on the farm as a family we make it fun, we make it an adventure.*
- » *Now that the kids are older I have pushed to get family time and holidaying as a family.*
- » *We have family dinner every week together which includes all siblings, partners and the extended family involved in the business.*
- » *Families need to spend time together building trust and relationships.*
- » *Create times when we act as a business and as a family.*

6.1.9 Independence of identity and personal development

A couple of the participants were very clear about maintaining independence of identity in some form depending on what was important to them and duration of involvement in the family business.

- » *It was important to me that when we first moved to the farm I had my own job and was still able to pay the mortgage on my house back home.*
- » *Not having it (the family business) define you is key, be 100% committed but being confident in yourself that if it all went belly up it will be OK.*
- » *Working off farm is not necessarily about the job, but a skill set I am developing and the different situations I am being exposed too.*

Personal development was something highly valued both for their own personal benefit and enjoyment but also the skills and confidence it allowed them to bring back to the family and business.

- » *Being involved in off farm industry roles has provided me with an outlet, meeting other women in similar positions, learning different skills and developing a support network. I learnt how to define my goals and purpose. It has provided me with the confidence to bring a different point of view to the business. I also realise that farming is my husband's dream, I love the lifestyle and always intend to stay highly involved and committed in the business but this is not my passion. My ongoing training and leadership experience is giving me the confidence to look at options outside of the farm.*
- » *I lost a lot of confidence while farming with my husband's family, doing a personal development course ignited my confidence again.*

Both advisors who work closely with families transitioning between generations place a lot of importance on growing the knowledge and skills of the next generation to ensure they are capable and supported to meet the future goals and ambitions of the business.

- » *Families need to take a proactive approach to development and training of the younger generation, brainstorming skills that they need overtime and opportunities that exist.*

6.1.10 The next generation

Some of the participants had their own school or university age children and I was interested in what proactive parental practices conscious or unconsciously they were exercising. I observed that all families were taking a much more open and flatter approach to family business discussions than previous generations.

- » *We talk openly about farming and business. If they ask a question we go there with them.*
- » *It is important to build resilience, share in the good and the bad so they know there will be tough times but you come out the other side and appreciate the good stuff.*
- » *We talk to our children about finances and the issues of succession, we are open in our conversations, try to be transparent and get them involved in meetings with the accountant. When they are home we value their contribution, and put them on the payroll.*

- » *Importance should be placed on defining family values, this is what our family means and this is the behaviour you will see as a result. This type of thing can be done with children when they are young.*

7 Discussion

Integrating into a family farm business is complicated which is probably an understatement. But how are some individuals and families able to manage the complexities and flourish on a personal, family and business level?

To help me reach a conclusion I sought motivation from the Tolstoy quote “All happy families are alike; each unhappy family is unhappy in its own way” which had been referenced in several family books. By fleshing out what were the common themes that continued to emerge throughout my interviews and what I had read I have identified what I see are the attributes to successful and harmonious integration into a family business.

The visual representation places importance on the two central attributes of staying values driven and maintaining a strong and connected spouse relationship. From there stems the remaining six attributes. A deliberate decision was for these themes to be verbs to emphasise the importance of constantly acting revisiting and nurturing each component.



Figure 4: Attributes of harmonious integration into a family business

7.1 Stay values driven

“We stand at the crossroads, each minute, each hour, each day, making choices. We choose the thoughts we allow ourselves to think, the passions we allow ourselves to feel, and the actions we allow ourselves to perform. Each choice is made in the context of whatever value system we’ve selected to govern our lives. In selecting that value system, we are, in a very real way, making the most important choice we will ever make” - B. Franklin

This is about staying true to yourself and what you believe is important to the way you live. Values determine your priorities and likely are the measures you use to tell if your life is turning out the way you want it to. When life is going well, you are likely to be acting in a way that matches your values, when life doesn't align that creates unhappiness. Therefore understanding your values and living to them is critically important.

In the world of Simon Sinek, this is the 'WHY'. Fulfilment comes when we live our lives with purpose. “When we discover our WHY, we are better able to find the clarity and confidence to choose the careers, organizations, communities and relationships that are most likely to inspire us.”

For me this is about coming from the heart, truly understanding what makes you happy, and staying authentic and focusing on what is important. By doing so you then can clearly articulate this to others and be truly understood. Recognising also the differences in what matters to you compared to that of the wider family, acknowledging that a gap may or may not exist and give time to understanding how this may impact your integration into the family and business.

This was summed up well by one professional “By understanding and sharing your core values you are allowing insight into what you are thinking and what is important to you.” One family spent over a year developing their future plan and through that experience had to “find common ground” and “discuss what was negotiable and non-negotiable”.

Staying values driven gives you greater chance of keeping on track and getting it right and as one participant put it “if your intentions are well thought through and from the right place, you are probably not going to go wrong.”

7.2 Strong and connected spouse relationship

“The farm is only as solid as the relationships that sustain it.” – M. McKenzie

Looking back through the interview questions and responses, I did not put much emphasis on the spouse relationship aspect of integrating into a family business. But as I was collating my findings and connecting

the dots, it became apparent to me that the whole reason a person is in the position of integrating into a family business is because they fall in love with someone who is involved in a family farm business. Secondly only to staying true to your values is maintaining a strong and connected spouse relationship, for if that no longer exists then what foundation remains for the involvement in the family business.

It became very apparent through the interview process that farming participants had very open, aligned and supportive relationships with their spouses and by doing so they gained the respect and presented a united front when working through challenges within the family business. “If there was something we weren’t happy with it would be communicated via my husband and we would approach the family as a partnership.” “My husband is very supportive of my off-farm commitments and helping with the kids when I am away.”

Investing in your relationship with your spouse is the equivalent of building resilience for getting through the tough times. It means finding ways to show your love for each other, developing the skills to talk through the tough stuff, respecting each other for who they are and spending time together doing things you enjoy. Stephen R. Covey believes that the problems people face in marriage are almost in every case risen out of conflicting role expectations and are exacerbated by conflicting problem-solving strategies. Advocating shared and agreed upon role expectations, problem-solving strategies, vision and values in a relationship, termed ‘co-missioning’ it is the binding together so that you have the same destination.

“The intentional things we choose to do as we do in our love life as farmers is going to make a big difference to the resilience we have as couples to deal with the stresses of everyday farming.” – E. Froese

7.3 Prioritise understanding time

“As we project our conditioning experience onto the outside world, we assume we’re seeing the world the way it is. But we’re not. We’re seeing the world as we are – or as we have been conditioned to be. And until we gain the capacity to step out of our own autobiography – to set aside our own glasses and really see the world through the eyes of others – we will never be able to build deep, authentic relationships and have the capacity to influence in positive ways”. – S. R. Covey

In one of the interviews a participant used the term ‘understanding time’ to develop deeper relationships with her parent in-laws. This term really stuck with me because it not only described the action of stepping into another person’s shoes it also made it feel like a conscious activity that one put effort into and took a strategic approach to. It is easy to say or think we understand but do we really, has time been taken to peel the layers and get to the core of people’s drivers, their values, their story, their dreams, their fears and ultimately how they see you? I have also included ‘prioritise’ in the attribute because a pro-active approach needs to be taken, people need to go out of their way to make it happen.

Understanding time is also relevant to the business aspect as well as the personal. The depth of understanding will depend on the role played in the family business but being given the opportunity to at least have “a general awareness that the farm is sustainable and is going in a direction which you are comfortable with” (McKenzie, 2014).

Understanding time requires the skill of asking the right questions and empathic listening. Empathic listening is the highest form of listening and enables you to really get inside another person’s frame of reference. Even if you are emotionally involved in an exchange with somebody you are able to step outside the emotion, not take a position yourself and reflect back in new words what they said to you, it is listening with you heart, eyes and ears. “Listening is a search to find the treasure of the true person as revealed verbally and nonverbally ... I will rephrase what you have said, and check it out with you to make sure that what left your mind and heart arrived in my mind and heart intact and without distortion.” – J. Powell

Professional facilitators interviewed provided examples of situations where in family meetings progress had stalled through emotion, in this instance they asked, “Tell me about the tears”, “What was it like for you?”, “What did you have to put up with?” these can be powerful questions seeking out why patterns of behaviour may have emerged.

7.4 Develop conversational confidence

My first thought was to use the word communicate to describe this attribute but to me that had too wide a meaning. If you are in a family business and therefore live close to one another the chances are you communicate a lot more than most other people do with their family! I wanted an attribute which described the type of communication we are seeking.

In an interview, we were discussing what formal and informal communication the family had and at the end of the conversation they said, “really it is allowing everybody to develop conversational confidence”. And to me this is the essence of how we want to communicate as a family. We want each member to have the strength and courage to talk openly and honestly to one another and feel safe in doing so. Words are well crafted, judgement is reserved and new ideas are welcomed. In one family, this was illustrated as “Everything is very fluid and ongoing, we are always open to discussion and ideas as a family. Having regular communication means you know the times when things can be discussed.”

How a family enables that conversational confidence to be established will vary but it was apparent from the interviews which I conducted that families did not leave this to chance. They understood that to create that safe place and give everyone a voice they had regular, planned and structure time often with an external advisor or facilitator present. “The advisor was able to deliver the message, it preserved the family

harmony”, “when dad died it added emotional stress and it was important that we had someone independent to provide an objective view”.

Conversational confidence I believe is achieved when we practise the attribute of “prioritising understanding time”, in effect holding these planned meetings is a form of understanding time.

7.5 Remain agile

“If we want happier families, tinker with it all the time – B. Feiler

Bruce Feiler refers to it in his book as ‘Adapt All the Time’ and ‘agile development’ a term used in the business world. Recognising that families are constantly undergoing change and one of the most important characteristics of families is being “rapidly adaptable”. Not being bound to fixed rules, having the freedom to create new rules and decentralising of power. Acknowledging that power has shifted from the exclusive domain of fathers to include mothers and children. This is not about disrespect of parents or anything goes but utilising the insight the younger generations can bring to work through solutions, moving away from the waterfall approach. This bears similarity to how the family business is evolving, no longer are decision dictated by one member of the older generation, but a more collaborative approach is used to solving problems and refining how things are done.

I see that families and individuals entering a family business need to remain adaptable and flexible to stay happy and functional. Making a commitment to always work to improve your family and yourself.

“People think it’s natural to live in a world in where everyone is dysfunctional. It’s not. It’s normal for people to be satisfied. All you have to do is remove the barriers that are making you unhappy and you’ll be a lot happier” – Jeff Sutherland.

Through the interviews, I saw this agility in action “Everything is very fluid and ongoing, we are always open to discussion and ideas as a family.” One professional seeks to install this agility in families “I really encourage families to see generational transition and succession as a process that never ends.” In Built to Last by Jim Collins two core beliefs of successful companies that align to this attribute. Preserve the core while stimulating progress, being able to adapt and change over time in response to what is happening around you and secondly try a lot of stuff and keep what works, use trial and error to make evolutionary progress.

7.6 Practice self-care

Self-care is not selfish, you cannot serve from an empty vessel – Eleanor Brown

This attribute is not about self-centredness. It is about nurturing yourself to enable you to be happy so both you and your family can flourish. Through my literature review and further articles by Elaine Froese the importance of self-care was a re-occurring theme stating, “people who can bounce back quickly practice good self-care – It is important to take care of yourself, to not burn out by taking time off when you are sick, setting limits on work hours and reducing the things which cause stress or pain.”

Aside from all the aspects of self-care such as sleep, food and exercise I wanted to focus on the mental aspect which encompasses feeding our brain and the importance of continued learning or professional development. For all participants interviewed investing in their knowledge regardless of the topic or area was observed as a significant factor which supported them in their journey and involvement in a family business. Comments included “Working off farm is not necessarily about the job, but a skill set I am developing and the different situations I am being exposed too.” “It has provided me with the confidence to bring a different point of view to the business. My ongoing training and leadership experience is giving me the confidence to look at options outside of the farm.” “I lost a lot of confidence while farming with my husband’s family, doing a personal development course ignited my confidence again.”

Everybody’s pathway for self-care will be different the key is to do things that put you outside of your comfort zone, challenge your thinking or expose you to new experiences or insights. In turn this will also provide new networks and connections, social and intellectual stimulation. Building your resilience so when the pressure comes or confronted with a challenge something new you approach it as an opportunity to grow and learn and you have a tool box of skills and thinking to give it your best shot.

7.7 Be fun and creative

“Never, ever underestimate the importance of having fun” – Randy Pausch

Create the fun. Being involved in a family business is complicated, it can be all consuming and emotionally exhausting at times, farming is the same and seriousness can take hold of both the business and the family very easily. Families need to have fun. Fun is what creates memories, builds culture and makes people happy.

Through my literature review on what makes happy families, front and central was doing fun activities as a family, taking holidays and creating traditions. I tested this with my participants and not surprisingly each family had practises in place to ensure life and family was fun. “When we are out on the farm as a family

we make it fun, we make it an adventure.” Two families had annual wider family holidays which provided a time for connecting and enjoying each other as a family away from the business “Families need to spend time together building trust and relationships.”

Covey (1997) identified four human gifts which give us freedom of choice - self-awareness, imagination, conscience and independent will. When all four are blended, you reach a second order human gift. A Sense of Humour. “True humour is not light mindedness, it is light heartedness, being around people who are upbeat, full of good stories and humour is the very thing that makes people want to be with others. It gives you a positive, uplifting, nonreactive way to respond to the ups and downs of daily life.”

Be creative. New members who join a family business bring with them new energy and insight. Everything is seen through a different lens and from a new perspective. Harness this and experiment with bringing creative ideas, opportunities and approaches to the family and business for discussion. This also intertwines with a theme identified in the interviews of being valued. Families must take time to understand and acknowledge skills and seek to embrace those beneficial to the business. “The family acknowledged that my skill set was beneficial to the business and formalised a role for me. My skills were embraced by the family and not seen as a threat.” “I accept the talents and personalities of my children and their partners and make use of them.”

This comes with a caveat “It is important to be patient and earn your stripes, you can’t go charging in, it can be very volatile when dealing with family business.”

7.8 Change can start with you

“Happiness is not something ready-made. It comes from your own actions” Dalia Lama

Joining a family business will be a total different experience for each person. For some they may start at a pretty low power base, feel the need to prove themselves, are daunted by the existing culture and personalities or have little interest or understanding of the industry which the business operates in. For others, it will be an exciting and seamless transition where their skills are quickly valued and utilised, they just click with the family and naturally find their place.

Whatever situation you are presented achieving success and happiness within a family business is a matter of choice and the best way to make that choice is to start with the little things. There is no one action or conversation. There is just a commitment to making incremental changes and accumulating “small wins”. “You have more control over your life than you realize. Everyone gets to make choices and act on them. The problem is, many folk don’t realize they have the power to choose, and to act, and to move into a

different scenario. It's true that you can't control others, but even making the smallest changes can impact the people around you." (Froese and McKenzie, 2014)

In *7 Habits of Highly Effective Families* (Covey, 2017), number one habit is Be Proactive, the chapter begins with these powerful sentences "Between stimulus and response, there is a space. In that space lies our freedom and power to choose our response. In our response lies our growth and our happiness." The space is referred to as the "pause button" and it is what enables us to stop between what happens to us and our response to it, and to choose our own response.

The Circle of Influence and the Circle of Concern (Figure 5) from *7 Habits* provides a visual example of the what happens when we stay focused on the things we can influence or do something about compared to when we focus on the things outside of our influence. The Circle of Concern on the outside is everything in life that you may be concerned about but can do little to influence e.g. weather, other people's attitudes or behaviours. The Circle of Influence is the inner circle and is everything you can actually do something about e.g. how well you conduct your job, your health, attitude how you treat other people.

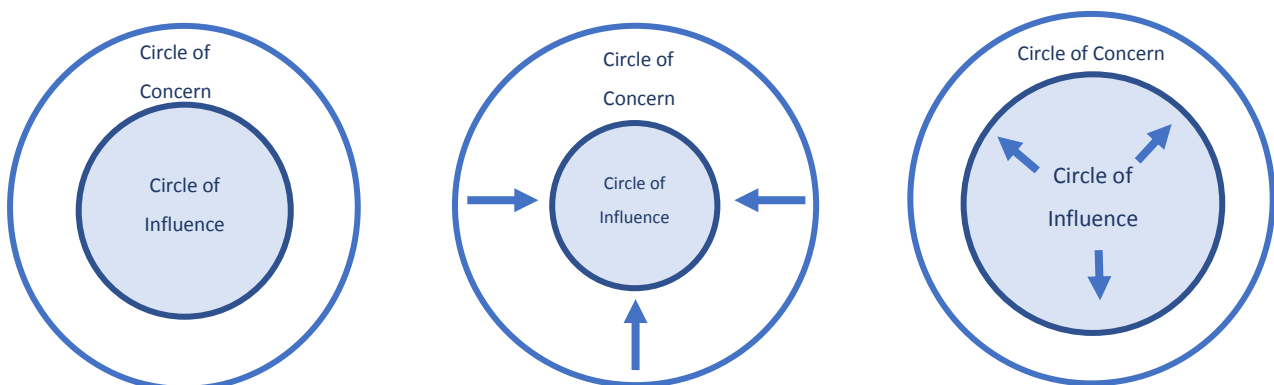


Figure 5: Circle of Influence and Circle of Concern

Focusing on the Circle of Concern is essentially focusing on things you have little control over and by doing so it reduces your Circle of Influence. Spending time and energy focus this of concern but you have little control over reduces your circle of influence. Proactive people focus on their Circle of Influence and from that the circle of influence increases.

Focusing on The Circle of Influence is recognising that by focusing on your own thoughts and actions, developing yourself, building strong and positive relations with partners and children the ripple effect will continue and The Circle of Influence will expand.

8 Recommendations

In the introduction, my hope was that this research topic would create greater awareness around the people aspect of family farm businesses. It is not a straight forward road to travel, with unexpected bumps and deviations along the way. Whether you are gliding along nicely or weathering a storm the opportunity for reflection is always valuable. The following questions and discussion points within the eight attributes identified will provide some impetus around ensuring one thrives when integrating into a family farm business.

Stay values driven

- » Understanding what is important to you and living a life aligned to what matters is fundamental to achieving a happy life.
- » How much clarity do you have around your values or what guides you in your decision making?
- » Are you living your life in a way that truly makes you happy?
- » Can you articulate what is important to the people closest to you?

Strong and connected spouse relationship

- » Investing in your relationship with your spouse is the equivalent of building resilience for getting through the tough times.
- » Do you prioritise time and energy for your relationship on a regular basis?
- » Have you developed a constructive way of talking through the tough stuff and big issues?
- » Are you able to approach situations as a united partnership?

Prioritise understanding time

- » Building strong relationships requires one to see the world through the other person's eyes and truly understand their perspective.
- » How well do you truly understand the members of your family, their history, their journey, their fears and dreams?
- » Are you asking the right questions and being an empathic listener, one who listens not only to the words but removes judgement and listens with the ears, eyes and heart?

Develop conversational confidence

- » Every family should strive to create an environment where each member has the skills and courage to talk openly and honestly to one another and feel safe in doing so.
- » Does your family have regular, planned and structured meetings to ensure open and safe communication?
- » Each family will differ depending on their size, structure and who is involved. Identify an approach that works for everyone and recognise when the need exists for an independent to support and manage the emotions and challenging issues.

- » How do you manage your emotions so that when the hard stuff is talked about emotions do not get in the way?

Remain agile

- » The only constant is change, families who adapt, evolve and try new ways of doing things will build resilience and stimulate progress.
- » What is working and not working for you, your family and your business?
- » What framework could be established to constantly and constructively review what is working and what is not working and adapt appropriately?

Practice self-care

- » Looking after yourself is like refuelling and it ensures you bounce back when things are tough or stressful. Recognise what you need to remain balanced, healthy and energised.
- » In what ways are you challenging your mind, stepping outside your comfort zone and seeking new experiences, big or small?

Have fun and be creative

- » Have the confidence to be the breath of fresh air, bring fresh insight and ideas.
- » Work hard to be understood and acknowledged for the skills and capabilities that you have while respecting the experience and roles of the wider family.
- » Seek opportunities to bring fun, humour and enjoyment. Create traditions, plan holidays and make the small things memorable.

Change can start with you

- » Do not underestimate the impact and influence your actions or inactions can have on the wider family. Start with the right mindset and a commitment to try.
- » Focus on your circle of influence and be patient as it grows. Do not trouble yourself with things outside of your control.
- » Acknowledge that there is space between every situation and how we respond to it. In that space lies the freedom and power to choose a response that impacts your growth and happiness.
- » What strategies can you develop that ensure you hit the 'pause' button and stop when stressful or challenging things happen to enable you to choose your own response.

9 Conclusions

For most people, they don't plan who they fall in love with. And for those who fall in love with someone that is involved in a family farm business it can feel like they get more than they signed up for. Joining a family farm business has its own set of intricacies. You are confronted with the balancing act of operating a business, maintaining family relationships, creating your own family culture and meeting your personal needs and aspirations. What this project centred around was identifying the attributes which can be adopted to support successful integration into a family farm business.

Integrating into a family farming business requires the new family member to understand and assimilate the culture of the new family members and the enterprise, from the values and traditions they hold to their attitudes towards money, workload, education, living arrangements, managing a business and how they communicate.

When I set out on my research, I anticipated my focus would be on the initial stages of joining a family business and that successful integration is about what happens in the early phases. What I quickly discovered is that integrating into a family business is a journey that one is on for a life time. Yes, what happens in the first days, weeks, months and year does set the foundations but becoming part of a family and business is a constant evolution and involves continual learning and application. Peoples priorities change, capabilities develop, different stages of life are reached, new opportunities arise, additional family members join and loved one's pass.

For that reason, the attributes which have been identified are timeless and can be adopted at any stage of the journey. At the heart is to remain values focused living a life aligned to what is important to you. Second is to maintain a strong and connected spouse relationship. From there stems prioritising understanding time, developing conversational confidence, remaining agile, practicing self-care, having fun and being creative and recognising change can start with you.

It is about giving yourself permission to stay true to who you are, prioritising relationships with your spouse and loved ones but recognising that there is a responsibility to step out of your world, to genuinely understand others, be open to change, develop the skills of listening, asking the right questions and managing responses. Making time for developing new skills, continued learning and doing activities that are enjoyable and bring happiness. Finally, it is acknowledging that every person has the power to choose the way they behave and to not under estimate the effect small changes can have on the people around you.

The attributes of joining a family business are aimed at supporting those assuming the daughter or son in-law role but to achieve a truly harmonious integration into a family business it takes commitment from all

the family members. A willingness to support and nurture, understand, accommodate and welcome. I therefore believe many if not all eight attributes are worthy of attention by all kinfolk involved.

The following lines from Leo Tolstoy *Anna Karenina* have been quoted in two family books and like the authors, I too was weary of its relevance, but through my research and interviews I now agree.

“All happy families are alike; each unhappy family is unhappy in its own way”

I have learnt that no two families are the same in the unique set of challenges that they face, whether it is related to the business, the family or both. Comparisons should never be made from one family to another. Each family will make their own decisions based on what is right for them and situations which they are presented with. But, what strong and connected families do have in common is their clarity of direction and commitment to the things which build resilience within their family. By doing so they develop the capacity to rebound from adversity stronger and more resourceful, transform and grow ensuring they continue towards their chosen destination.

“As important as your obligations as a doctor, lawyer, or business leader will be, you are a human being first, and those human connections – with spouses, with children, with friends – are the most important investments you will ever make. At the end of your life, you will never regret not having passed one more test, not winning one more verdict, or not closing one more deal. You will regret time not spent with a husband, a child, a friend or a parent ... Our success as a society depends not on what happens in the White House but on what happens inside your house.” Former First Lady Barbara Bush, Graduating Speech Wellesley College.

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11 Appendices

11.1 Survey Questions

1. Tell me about how your background and how you became involved in the family business.
2. What role do you play within the family business?
3. What communication formal or informal exists for the family and business? Are external facilitators or professionals used and why?
4. How aligned are your values to those of the family and business?
5. What role do you feel emotional intelligences plays when involved in a family business?
6. What do you believe your family does well that contributes to the effectiveness of the family and business?
7. What challenges have you faced and how have you managed those challenges?
8. How do you balance your needs and aspirations with those of the wider family and business?
9. What advice would you give to someone joining a family business?