



**A Nuffield Farming Scholarships Trust  
Report**

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**Where Corporate Meets Family in  
Business**

**Alexa Parker  
July 2019**

**NUFFIELD**

## **NUFFIELD FARMING SCHOLARSHIPS TRUST (UK)**

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Southill Farm, Staple Fitzpaine, Taunton, TA3 5SH

Tel: 01460 234012

Email: [director@nuffieldscholar.org](mailto:director@nuffieldscholar.org)

[www.nuffieldscholar.org](http://www.nuffieldscholar.org)

# A Nuffield (UK) Farming Scholarships Trust Report

Date of report: (July 2019)



*“Leading positive change in agriculture.  
Inspiring passion and potential in people.”*

Title	Where Corporate meets Family in Business
Scholar	Alexa Parker
Sponsor	The Trehane Trust
Objectives of Study Tour	Establishing what family run business can take from corporate organisations. Getting to the heart of what makes corporate successful and exploring family businesses that have adopted corporate structures whilst importantly retaining their family values.
Countries Visited	UK, Ireland, Netherlands, New Zealand, USA and Chile and Ecuador
Messages	This report is for family run farms to read and find ways to enhance their business even further by learning some ‘tricks of the trade’ from the corporate world, taking the best bits, whilst retaining their own individuality and staying true to their family values. For example, how to set the right boundaries, drafting in the experts, stepping back and playing to strengths.

## EXECUTIVE SUMMARY

The aim of this study is to understand what can be transferred from a corporate business model to a family enterprise whilst retaining the essence of a family business.

Looking at the best of both ownership models, I wanted to get to the heart of what makes both successful. From my own experience of growing up in a family run farming business and then marrying in to another, I've seen how essential it is to have good communication and governance in place. I've also seen the effect on a family when it doesn't exist. I've built my study around this very topic, bringing back better insight for family enterprises.

My report builds on the deep-rooted qualities and values I've seen in family run businesses. These to me remain sacred and are the backbone to the brand. This report highlights the importance of holding on to these values.

Before I started this study, I had an expectation that corporate and family owned businesses were two very different animals. For example, I thought a long-term view for a corporate business was 5-10 years whereas a family business looked ahead 30 years plus to take into account generations. I also thought family businesses in the farming industry had an expectation they would be around for ever. Their governance didn't take priority and strategic thinking on occasion took a back seat.

However, the contrast and the assumptions I'd made in advance were not so. I came to realise quite quickly that ownership is irrelevant; it's about the way the business chooses to function and how you empower people within it regardless of connection to the ownership. During my Nuffield research I found family and corporate businesses had major similarities and whilst there were differences, they were not the differences I originally thought.

In fact, my study shows family run businesses can have everything a corporate business has. They just need to know what works well in corporate and recreate it for their own business. For example, bringing in expertise that doesn't exist in the family or finding support to help them expose hidden talents they already have. This allows families to stay together and successfully integrate generations.

To realise the potential of being a part of a family business we shouldn't take for granted the opportunities to learn about business from a very young age. We need to make sure we continue investment in family members, even when they don't fit the expected family mould.

This report provides evidence that 'great business' be it corporate, family or other, comes down to people having a vision and knowing what the company strategy is. Building and relying on structure and governance when you need an anchor, regardless of the size of the business, can be vital.

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## DISCLAIMER

The opinions expressed in this report are my own and not necessarily those of the Nuffield Farming Scholarships Trust, or of my sponsor, or of any other sponsoring body.

## CONTACT DETAILS

Alexandra Parker

[alexa@splattenridden.com](mailto:alexa@splattenridden.com)

Mob: 07815 111 638

Bloomsbury  
1 Grist Lane  
Angarrack  
Cornwall  
TR27 5HZ

Nuffield Farming Scholars are available to speak to NFU Branches, Agricultural Discussion Groups and similar organisations

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Southill Farmhouse, Staple Fitzpaine, Taunton TA3 5SH  
Tel : 01460 234012  
email : [director@nuffieldscholar.org](mailto:director@nuffieldscholar.org)  
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# 1. Personal Introduction



**Figure1:** Alexa Parker (Source: author)

I grew up on our family farm close to St. Ives, in Cornwall, South-West England. As much as I loved growing up on a farm and the environment and education that naturally comes with it, I was determined to find my own way and establish my own identity. Following university where I studied Media I headed straight for London and took my first role in a brand design agency. Whilst I loved this experience, it gave me a complete contrast to the farming life I knew well. It was a pivotal moment for me and I decided my heart was firmly back in the food and farming industry.

In the brand and media world, I saw the flip side and the consequences of not treating the business you're in as if it's your own. It was an alien concept to me and I immediately identified it as strong value of mine.

I decided to use all the skills and knowledge I'd gathered back in the food industry where I felt I could make a real difference. Still wanting to hold on to my own identity I aimed for the other end of the supply chain from my family run business. So I joined Finlay's fresh produce as a supply chain manager working with retailers and sourcing products from all around the world.

I now live back in Cornwall with my husband, having spent the last ten years working in and around London, most recently as Procurement Lead for milk at Saputo Dairy UK (SDUK), formally Dairy Crest (DC).





I'm currently responsible for sourcing around 550M litres of milk supplied annually to our North Cornwall creamery. My role mainly involves relationship building, leading a team, great communication and supporting family run farming businesses to supply top quality milk.

Whilst I've been at Saputo I've developed other core skills such as managing a portfolio of stakeholders across the business, implementing effective change, leading successful teams and shaping strategy.

In the past 15 years, our family farm in Cornwall has grown and diversified into three core enterprises; an autumn block-calving dairy herd, an arable and vegetable business and a green waste recycling company.

More recently, my experience of the corporate world has allowed me to support my family who are looking at the way they take the business forward. This blend of family business alongside my own career in corporate has given me a great foundation to fulfil this study.



## 2. Background to the study.

Essentially UK farming and corporate business in the food industry have the same goal which is to produce quality food, meet supply and demand and continually innovate. They want to do this in a way that is cost efficient, sustainable and responsible, all of which provide great value to the consumer. There are, however, vast differences between the methods each uses to achieve this.

Typically farming businesses are family owned and run; in contrast, processors and retailers are mainly dominated by corporate entities which naturally drive a different way of thinking and set of behaviours (there are some exceptions which I explore in my study). With Brexit on the horizon, British agriculture is approaching another period of major change and the impact is not yet clear. This is creating a need for businesses in the food supply chain to review their current business model and see if it's still fit for purpose.

Historically running a family farming business has been a way of life, holistically providing for the family. Succession is often heavily influenced by tradition and emotional attachments. In contrast, the rest of the food chain tackles growth by consolidation and the creation of new corporate structures. Corporates are getting bigger therefore there is a risk that the divide between the two will widen.

There is the potential for corporates to lose their values, identity and connection with their supply base - the family run farm. I see a real opportunity for family farms to take ways of working from the corporate environment and build it into their daily operations. With the current climate, this is essential for family businesses to survive and thrive.

I've been extremely lucky working for Dairy Crest, (now Saputo), and I've had some rich experiences working with mentors from other organisations who've challenged the way I think. They've taught me to look up and out, and also take equal time to reflect inwards and understand my own strengths, weaknesses. Seeking support where I need it and capitalising on my strengths by sharing them with others. I've also learnt when to be a leader and when it's right to be led. I know I'm lucky to have these skills and one important conclusion whilst carrying out this study is that family farms could benefit immensely from more time to reflect and look upon each other as business partners and not just as family members. This could be by personality profiling, coaching or mentoring but above all by making it a priority to understand each other and investing time in setting expectations around behaviors and boundaries.

I've created this report for members of family run farms to read and enhance their businesses even further by learning some 'tricks of the trade' from the corporate world, taking the best bits, whilst retaining their own individuality and staying true to their family values.

In fact, my Husband recently returned from the corporate world to his family business. Seeing the transformation and some of the challenges the family faced is another reason for me choosing this topic.



Whilst throughout this report, I may refer to insight and ideas the corporate world could learn from family run farming business, the primary focus of this study concentrates on looking at what family business can learn from corporate.



### 3. Study Tour Details

I visited the following countries during my Nuffield Farming study tour:

**Table 1: Study Tour Itinerary**

Countries visited	Companies visited	Rationale for choosing these countries
<p><b>UK</b></p> <p>Visits between April 2018 – March 2019</p>	<ul style="list-style-type: none"> <li>- Mary Quicke of Quicques cheese – dairy farmers and cheese processors</li> <li>- Antony Adorian – Dairy farmer – Sussex</li> <li>- Adrian Carne CEO - Yeo Valley – British processor</li> <li>- Warburtons – Large scale family owned bakery</li> </ul>	<p>The UK has examples of everything I wanted to study: Family run farms, well established brands that use their story to market exceptionally well.</p> <p>Steeped in tradition.</p> <p>Lots of generations to learn from.</p> <p>Specific challenges right now with Brexit on the horizon</p>
<p><b>Ireland</b></p> <p>June 2018</p>	<ul style="list-style-type: none"> <li>- David Kerr – Dairy Farmer</li> <li>- Kevin Twomey – Dairy Farmer</li> <li>- Bill O’Keeffe – Journalist – Irish Farmers Journal</li> </ul>	<p>Travelling to Ireland meant I could join the Nuffield dairy tour. We visited a number of dairy farms large and small.</p> <p>The group discussion was largely based around work life balance, management of teams and achieving scale in Irish dairying</p>
<p><b>Netherlands</b></p> <p>October 2018</p>	<ul style="list-style-type: none"> <li>- Royal A-ware cheese – food group</li> <li>- Kees and Phillippe Hemminga – Dairy Farmers</li> <li>- Gerjan Snippe – Bio Brass – Growing organic vegetables</li> </ul>	<p>I attended the Contemporary Scholars Conference (CSC) where I met with other scholars from around the world.</p> <p>Two major things I took away from spending time in the Netherlands:</p> <ol style="list-style-type: none"> <li>1) Their forward-thinking approach to agriculture</li> <li>2) The can-do attitude – making the most of resources, land / people / opportunity to export</li> </ol> <p>This had such an impact on me, I returned for a second visit</p>



Countries visited	Companies visited	Rationale for choosing these countries
<p><b>New Zealand</b></p> <p>November 2018</p>	<ul style="list-style-type: none"> <li>- Pasture Summit – conference</li> <li>- Tom Mason – Dairy Farmer</li> <li>- Simon Sankey – Dairy NZ</li> <li>- Margaret and David Turner and Mike Haworth -Rakaia Island</li> <li>- Pete Morrison – Chairman of Westland Dairies and dairy farmer</li> <li>- Michelle and Leigton - The Pye Group</li> <li>- Desiree and Ash Whitacker – Cardrona Distillery</li> <li>- Andrea Barry – The Bel Group – Dairy Farmers</li> <li>- Steve Allen – dairy farmer and Chairman of Tatua Dairies</li> <li>- Bev &amp; Geoff Laurent - Shoof – Agricultural retailers</li> <li>- Phillip and Maria White – Dairy Farmers</li> <li>- Arthur &amp; Julie Bryan – dairy farmers</li> <li>- The Ferris Family – Piriaka Farm</li> </ul>	<p>Initially I was debating whether to visit New Zealand having been there already.</p> <p>However, I was keen to attend the Positive Farmers Tour which took place on the North Island and had a strong focus on governance</p> <p>In contrast to the UK, New Zealand’s farming generations are less rooted in tradition.</p>
<p><b>USA (California, Colorado, Texas)</b></p> <p>December 2018</p>	<ul style="list-style-type: none"> <li>- The Alexandra Family – Farmers and processors, CA</li> <li>- Mitchel Yerxa and family – River Vista farms, CA</li> <li>- Tom Merwin – Winery, CA</li> <li>- Antony Ratto – Growers and processors, CA</li> <li>- Denise Moore – Nursery, CA</li> <li>- The Kalcevic Family – Grain Farmers – Colorado</li> <li>- John Locke – J.D Hugins, TX</li> <li>- April Bond – Cattle Ranch, TX</li> </ul>	<p>The attraction for me here was scale, and diversity.</p> <p>Somewhere new that I hadn’t explored before (I’m not sure Disney Land counts!).</p> <p>I had some great recommendations of business to visit from my UK contacts.</p>
<p><b>South America (Chile and Ecuador)</b></p> <p>January 2019</p>	<p>The Whites – Dairy Farmers in Chile</p>	<p>It’s South America! I wanted to visit the farmers who love a challenge and see how it’s done. Also, on the lookout for a totally new perspective</p>



## 4. It is possible to nurture generations and sustain a successful family business

### 4.1 Clogs to clogs in three generations – the power of presuppositions

*“Clogs to clogs in three generations”* is an expression said to be a Lancashire proverb originating from the late 19th century; the clog, a shoe with a thick wooden sole, was worn by manual workers in the north of England. The implication is that the energy and ability required to raise a person's material status from poverty is often not continued to the third generation and that the success achieved is therefore not sustained.

Quite early on in this study, I learnt it's important to be careful about setting or continuing on with presupposition i.e. an assumption or belief made in advance. If I had £100 every time someone said to me during my travels, “Clogs to clogs in three generations,” I'd be very rich! Phrases like this can become the language of the business and can unconsciously become an inherent value. It's much healthier to flip this to the positive and look at the 'why'. Why did our ancestors do the things they did in the way they did them? What was the positive benefit for them?

I found an example of this when I was talking to a family member of a large nursery in California about their business model and future decisions. It was described to me how restricted one family member felt about making new choices and suggesting innovative ideas. I asked what the reason was for feeling this way. The family member divulged that a member of the earlier generation was fearful of changing anything because of being 'the third generation'. It's a very real example of how an historic fable, if treated as a value or a belief can really drive the wrong behaviour.

In New Zealand, I found that tradition is not as ingrained as in some other countries. For example, in the UK our traditions bind us and create expected family succession. It's so strong that I see it holding us back from considering alternatives like collaborating with other farming businesses and building equity partnerships as may happen in New Zealand.

When setting family values, consider digging deep and dusting-off old fables and family traditions that may have worked for previous generations but might be holding you back. What was the positive intent then and what would be more useful to believe now?

### 4.2 Integrating generations back into a family business

There is a right and a wrong way to integrate generations back into a family run business. Getting it wrong can lead to confusion and disconnect down the line. Getting this right means transitioning incomers well from being family members only to also becoming professional partners in business. This is not always easy to achieve or to recognise the importance that should be placed on it. However, opportunities can only be best realised if all those involved in the family business have a professional open attitude and respect for each other.

I'll start with an example here about opportunities that come with working in a family business.



In New Zealand, I met Robert Ferris, a young, ambitious dairy farmer with a flair for innovation and a great deal of business acumen. I came across Robert as he was presenting at the Pasture Summit conference in New Zealand. He spoke about equity growth and being involved in his family business.

Robert left university with a degree in commerce, and as he put it ‘was ready to rule the world!’

I was intrigued as to why he chose to come home to the family business. Is he very fortunate or is his family fortunate to have him back? It depends which way you look at it.

Robert saw such opportunity in being a part of his family business. The business gave him a platform in which to invest and grow. And in return he gave all the rich learning he’d gained from his time immersed in studying for his degree. He brought back a fresh view, innovative ideas and a sense of reinvigoration.

Robert and his family took a business that was quite complicated and chose to simplify and ‘do a few things really well’. When Robert arrived back from university, the business was busy, had just an average financial understanding and far too often important decisions about the business were made in the dairy shed with little consideration to how this may impact other parts of the business. Generally, a decision was made too late anyway.

Robert talked about the decision he made to come back to the family business and also the acceptance of his family to open the door for him. His time away was valued, his knowledge was seen as a strength and his returning was a catalyst for him to work with his family and make suggestions on a new way forward together.

At the time, Robert’s decision also included his future plans on a personal level. He wanted to have financial freedom and also time to spend with his children in the future.

One of the first things they decided to do as a family was look for external support to help them understand where they wanted to go. This external dispassionate but all-round respected support can be vital in avoiding conversation becoming clouded in too much emotion and not enough business focus.

The family attended a Dairy NZ Governance course, which opened their eyes and helped them to refine what to focus on as a business, to understand where the gaps were and turn what they wanted into a strategic plan. The plan needed to work on two levels, one to address family needs such as money and independence and, secondly to incorporate the fact that the family were also business partners and required their different strengths recognised, to enable them to ‘wear different hats’. Having a plan together had helped the family grow the business to five times the size it was when Robert came home.

What was so significant about the plan that resulted in such huge growth and expansion’?

The plan gave:

- 1) Boundaries – around how decisions are made on farm and which policies to adopt e.g. the way fertiliser is used on farm and how and when cows are dried off.
- 2) An awareness that better financial understanding was needed and the desire to engage external support.



- 3) Unity – a joint agreement of what the business wanted to achieve.
- 4) Clarity – on how the agreed plan would be delivered, who would deliver it and when.
- 5) Focus - paying attention to what they can control and not what they can't (e.g. sweating about the weather).

My meeting with Robert and his family showed me how it's possible to do the following really well:

A) **Integrate back into a family business** by recognising and using the opportunities to advantage. Respecting each other's strengths, maintaining kindness, openness and a sense of all wanting to ultimately achieve the same things enabled success and growth in their business.

B) **Create a new way of working** after many years. By working together, they took time to understand structure was needed and they were brave enough to go and find it.

#### **4.3 Honouring differences to retain generations in a family business**

I met the White family in New Zealand on The Positive Farmers Tour.

It was at this visit that I realised how important it is to have goals and a strategy for a family business. Without a clear strategy and goals, family emotions and certain generations can dictate the direction.

While I was there I appreciated the importance of wants and desires being nurtured and accepted.

Through attending a governance workshop as a family, the Whites discovered the youngest son didn't have the same passion for milking cows as his siblings. This realisation could've been disastrous and in fact I learnt he was on the edge of leaving the business altogether. He just wasn't enjoying his work.

It took the strength of the family, lots of conversation and honesty to get to a stage where a new arm of the business was formed. They wanted as a whole family to keep him within the business and he wanted to be a part of it. As a result, a separate entity to the dairy business was formed, where they bought a run off block allowing him to manage dry stock. This meant the eldest son also had his own area of the business to run.

They did this by following a structure and answering a few key questions as a family:

- 1) What do you want for your parents / brothers / sons?
- 2) What are your family values?
- 3) What common ground do you all have?

Through this process they were able to create space for the third son to be heard, take on board his goals, and invest in him as a key strength within the business. The alternative would've been losing him altogether.

The key here is not to assume a family member will automatically join the family business. Both sides need to agree when a family member wants to join the business. Talk about how it will happen, the process and next steps e.g. What is my job description? How will I fit into the decision-





making processes? How will I be rewarded? What does my future look like within this family business?

The following figure is an accepted model of the stages often gone through when establishing a new team, making or adapting to changes in business.



**Figure 1: Image depicting the stages of transition for any team or change**

*Source:(Tuckman,1965) (Spencer, J.and Pruss, A.1992).*

The forming-storming-norming-performing model of group development was first proposed by Bruce Tuckman in 1965 (Tuckman 1965, Quote 1): he considered these stages are necessary for a team to adapt and grow, face their business challenges and arrive with successful outcomes.

Every change will take you through this process.

Notice what will change as a result – when a person leaves or joins any team, change will happen. It’s a given.

Dynamics will change, and the clever bit is to use it as an opportunity to reassess the plan and if you don’t have one, create one. Be clear on individual family expectations, even if it feels uncomfortable.



#### 4.4 Takeaways:

- 1) Don't let limiting beliefs and old fables rule your family business. Decide what would be more useful to believe.
- 2) Draft in the experts. External support to help bring your thoughts to life and to turn them into a plan.
- 3) See the value in differences as well as similarities within the family, be it skills, outside experience, style or preference and use them to your advantage.
- 4) Make sure everyone gets something if not all of what they want – there can be a win win and you may even get a stronger business as a result.



## 5: Governance is essential



**Figure 2: Image depicting how people might come together to govern a business/company.**

*Source: [www.saputo.com](http://www.saputo.com)*

Governance protects business from the family and vice versa. It creates space between the two entities and a structure that the family feels safe to operate in. It's healthy to be able to take a 'helicopter view' from time to time and review how the business is performing holistically. As Pete Morrison (a dairy farmer in NZ and Chairman of Westlands Dairy) told me, "You can't grow a business, review a business and run it at the same time".

### 5.1 What is governance?

Drawing on my experience, my connections and interactions with many businesses including my own family business, I have found that without governance in place, you can often only base decisions on pure emotion or hierarchy or who shouts the loudest. Whilst I'm sure this is a tried and tested method in many families, what it brings is a sense of discontent.

Governance provides formal rigor around decision making and puts controls in place to measure achievement and a method to review progress frequently.

I joined the Positive Farmers conference in New Zealand, facilitated by Lynaire Ryan, where the focus was on governance in dairy farming. In the opening section of the conference a member of the group asked "What does governance mean?" Silence fell! What a brilliant question! It could mean so many different things to so many and is often associated only with corporate businesses.

Lynaire shared a few definitions, one of them adapted from the definition given by Sir Adrian Cadbury (Cadbury 1992, Quote 2), who is recognised as the forefather of governance: it is, "*The... system.... by which businesses are directed and controlled*".



More recently, Dairy NZ has taken this definition and developed its own business governance programme. It defines governance as, *“The process of leading, controlling and directing a business so that it delivers a desired set of outcomes for the owners”*. (Quote 3.)

Initially the word ‘governance’ often conjures up visions of large corporates with multiple department heads around the board room table working to an agenda. However, when you look at and break down the actual meaning of governance it simply implies agreeing up front a way of performing and behaving around each other and recording that agreement. It involves setting expectations, sticking to them and agreeing how to review them.

You also need to be aware of emotion in governance. Sometimes the ability or lack of it, to talk about emotion is deep rooted in family dynamics. In corporate businesses people don’t have the same attachment to each other or the business. They may care about and love what they do but decisions won’t have the same impact. Decisions made in a family business which create changes, or even failure of part or all of the business, may impact the family home, family relationships and everybody’s incomes.

Talking about and addressing behaviours can take effort and work in a family business. In a family business the roots are deep, the archetypical postures and reactions have been cemented from a really early age (childhood) so it requires openness and a desire to support each other and talk about issues to keep the wheels turning and stop any fractures. Governance provides the structure and a formality to support these conversations in a different way. It holds boundaries and pre-determined expectations that everyone has agreed to.

## **5.2 Good governance motivates good business**

Governance is not rocket science and it doesn’t need to dominate the business. However, it’s essential to eliminate chaos, disappointment and a lot of headaches. Having ‘a system’ in place is especially needed where two families chose to work together.

### **5.2.1 The Kalcevic business governance changes**

I was presented with a clear example of this when I visited the Kalcevic’s on a farm in Colorado USA which was run by two fourth generation cousins and their families working together.

Arriving in Colorado, I met Danell and Kent Kalcevic. They confirmed the need for my report; Kent told me, “It’s really great you’re here looking at this topic because it validates what we’re striving for and how I communicate and engage with the team.”

They explained how they’d been through a period of no direction and noticing how old family traditions just weren’t serving them anymore such as discussing big decisions in the field around the pickup and it being a ‘fait accompli’ that whoever stays on the farm will get the farm.

They were having health challenges, worried about succession with maturing family members and struggling to keep up with compliance and regulation demands. They also had varied views on handling finances and making decisions that weren’t shared across the whole business. They knew they had to make changes and ultimately decide if they wanted to continue to work together as a family. Importantly this was acknowledged by everyone.



The first thing they did was get some advice externally. This immediately gave them fresh thinking and helped them work through the idea of how they could transition to a more corporate model. This was a smart and savvy move; it brought professionalism and formality to their discussions.

They decided on a six month timetable and agreed upfront (with a facilitator) what they wanted to accomplish:

- Gain a better understanding of each other as colleagues not just family
- Know the goals and needs of the whole family
- Decide what great communication looks and sounds like for them
- Ask each other “Do you want to continue working together or shall we agree to go our separate ways?”

The outcome was that the process helped the family decide that they wanted to stay together and commit to having a family business group with one goal and a clear direction. They decided, adapting from Louis L’Amour’s novel, “We will ride for the brand” (Louis L’Amour *Quote 4*).

### **5.2.2. How did the Kalcevic families achieve a successful outcome?**

The Kalcevics concluded the following important milestones:

- They individually made a commitment and decided if they were ‘in’ or ‘out’.
- They agreed to develop a formalised structure that would define how they managed the various businesses under the farm group and the employees within them
- They agreed a set of principles that they would all stick to. These included being fair and honest and having a process they would always use to make decisions.
- They created a new management group or ‘Exec Board’ to govern the entire estate

This was a complete overhaul of the previous way of working. Each member of the farm (regardless of position in family or role as an employee) had their contract for their current position terminated and were introduced back into the new employee structure that would be governed by a Board of Directors (Exec Board)

What this gave them:

- A structure chart that showed them the critical roles in each business function
- Individual accountability and ownership of tasks/operational area rather than geographical management
- Defined company values on which to base decision making and to help create a company culture for non-family members.
- Centralised decision making and a process to follow.

### **5.2.3 The Kalcevics company values:**

#### **Good communication**

Communication is needed on many different levels. Kalcevics had experience of previous poor communications so this value was high on their agenda. They wanted to make sure communication



flowed well between one another as business partners, as well as their employees. They did this by establishing various forums and meetings that took place regularly.

### **Empowerment**

Empowerment is the driving force for the way they wanted to do business. They chose to have disciplines around budgets and spending, meaning non-family members were empowered to be accountable. This was evident to me right from the start of my visit. I saw how much they valued their employees (both family and external). I witnessed their end of year workshop to 'celebrate success'. They shared business performance data and reflected on the year with everyone.

### **Support**

To be able to make decisions, however small or big, knowing that everyone will stand behind each other was hugely important for the Kalcevics, who were running a business that was vast. They needed a robust structure with complete trust. They trusted and they expected that in return.



**Figure 3:** The Kalcevic Board Meeting

(Source: photo taken by author)



I was invited to join the Kalcevic's Board meeting and see the benefits first-hand. This visit was a real breakthrough for me, I was only there for four days but in that time I'd seen the value of the structure they'd chosen to adopt. It was formal at times but I saw how that allowed them to be a family again. They didn't need to fear what would happen or who would do what. They respected the process and allowed it to take away the previous worries. I sat there with all three generations in the board room and I appreciated the knowledge and experience around the room. Importantly, whilst there was governance in place, I still saw a family running a business.

#### **5.2.4 The benefits of the Kalcevic governance analysis**

Overall the benefits gained by this exercise were:

- A clear business structure that created space to encourage individuality and new ideas
- Family members' individual strengths were acknowledged and they made conscious decisions to run the business using those strengths and recognised that not everyone can be the CEO.
- An agreed approach to how money would be spent.
- The governance gives assurance. This in turn has had a huge impact on health and wellbeing, allowing and acknowledging that it's fine to take a bit of time off and have a break.

#### **5.3 But the family farm is just the two of us, why do we need governance?**

Governance is needed regardless of business size. I experienced this when I visited a fellow Nuffield scholar's family farm in the Netherlands.

It's a small business, just father and son; none the less, they had a legal contract in place that laid down how they would work together. They agreed to be equals in the business regardless of family hierarchy. They were father and son in the family but colleagues in business, side by side making equal decisions and impacts on the business.

The agreement or governance included financial autonomy to a pre-determined limit. There were consequences if the terms of the agreement are broken. It also defined the rules around managing accounts and how much capital each partner could draw from the business at any time.

This instantly demanded accountability from both; the son had equal responsibility with the father and as a result learnt early-on the power of making decisions and the consequences of making them. Through this agreement 'governance' expectations were clear up front meaning both could get on and progress with piece of mind, knowing their agreement of 'how to behave and run the business' was understood by both. This didn't mean it couldn't be changed. If one party wanted something different it just meant there was a process to follow to make changes. Again, the agreement was bringing stability and certainty whilst retaining flexibility.

#### **5.4 Why is governance so crucial for a business now?**

There is a growing expectation from financial providers for farms to have better reporting structures and reviews before lending can happen and equally to track current lending. There are also growing external demands on farming businesses to have tighter structures and controls, such as farm standards, health & safety on farm and environmental compliance to name but a few.



These demands are creating a real need for family run farms to look seriously at structure, governance and controls. These elements of the family business may not come naturally, and therefore a choice has to be made: either learn how to, or bring in external support to provide this.

Farming is changing, and so is the role of the farmer. External demands are ever increasing and therefore demanding more from the skills and roles required to drive a family farming business forward.

#### **5.4.1 Rakaia Island, New Zealand**

One example of this is Rakaia Island in New Zealand which actually went as far as introducing a new Chief Executive Officer (CEO) who was external to the business. Over the last 10 years, the business has grown through land acquisition and they recognised the need to make the land they already had work well as a profitable business.

The CEO described his role as harnessing the knowledge and the skills already embedded in the family business, drawing them out and helping the business be the best it could be. He also knew that he needed to challenge current thinking, for example when the family wanted to acquire more land, he drew on his experience and they looked at how they could make what they currently had work even more for them. The family decided this was a better choice than acquiring more land.

#### **5.4.2 The process they went through**

The CEO

- started an advisory board to help the next generation understand more about the business.
- recognised the need for governance training and implemented some, such as understanding the role of directorship.
- set up a Board of Directors and guided them to build a strategy for the business

In summary their strategy for the next 3-5 years is as follows:

- 1) Play the game harder – get the basics right (health and safety, quality, people)
- 2) Change the rules – growth through innovation (improve processes and new technology)
- 3) Change the game – business evolution (diversification)

#### **5.4.3 Who is the CEO?**

There is a growing expectation from financial providers for farms to have better reporting structures and reviews before lending can happen and equally to track current lending. There are also growing external demands on farming businesses to have tighter structures and controls, such as farm standards.

Not every family run farm needs to bring in an external CEO. However, the richness that you get from a skill set based in governance is the bit that's needed. It might already exist in the family. Look for it, uncover who has this strength already and give them the autonomy to own it and deliver for the business.





From my travels, I've picked up awareness that on occasion in family business, everybody wants to be the boss! When I've spoken about this with successful businesses this is what they say, "You must leave your ego at the door, there's no place for that in family business; it just creates a divide."

The CEO of a well-known large family business referred to it as the 'I' and the 'we' and whoever is the person that you decide becomes the boss understands the difference between the two!

When taking the first step to implementing governance, you should consider including everyone in the process. Value everyone's opinion and personality at the outset. I observed one family who contracted in external support to put governance in place. The focus on governance was so fast that cracks appeared and a senior family member was inadvertently bypassed, creating disconnect for key decisions. The process was abandoned. The lesson here - everybody needs to be on board and see the value from the start.

### **5.5 Ownership is irrelevant – encouraging everyone to 'own' is key**

A message that the former CEO of DC Mark Allen was really passionate about was 'treat the business as if it's your own'. He made sure he talked about this each time he engaged with the wider business. He wanted all employees to care.

Regardless of type of ownership, there are some fundamental principles that help every type of business function and succeed.

Through the corporate stakeholder ownership model there is a clear definition between roles. The executive committee looks after the governance. The management lead the different functions and employees make it happen. All have one ultimate goal – to deliver a dividend for the shareholder (the owners).

The key for a family business which might not have the same scale as a corporate business, is identifying the different roles. By this I mean, write down your job description! Then think about how these roles combine to deliver for the family (the owners). Each role is intrinsic for success. Empowering everyone to care and 'own the business' is essential.

### **5.6 Takeaways**

#### **1. Governance is simply talking, agreeing, writing decisions down and tracking progress regularly.**

**Not having this in family run business can cause fractures in relationships, uncertainty (particularly for the next generation) and missed opportunities.**

#### **2. Bringing in external support is healthy.**

Joe Delves, a fellow Nuffield scholar and personal friend, described the above really well, "***I always think about Governance as the white lines around a football/rugby pitch. The game is always played inside the lines and it creates a safe environment to play the games. Like a game of sport, everyone knows the rules and the external person is like the referee.***"

#### **3. Every now and then have a helicopter view. Take a step back, look at the whole business from afar and see how different it looks.**



- 4. Structured processes and disciplines create space for external employees to take ownership and help drive the business forward**
- 5. Size or scale of the business shouldn't determine how structured it is – governance can even work with just father and son allowing fresh ideas and experience on an equal footing**
- 6. Governance allows you to be a family again and can help with training future family generations**
- 7. Respect for governance is crucial, otherwise it's pointless**
- 8. Look at the complimentary skills within the family; don't be afraid to acknowledge strengths and weaknesses and recognise gaps. Closing the skill gaps with an employee who isn't a family member still means you are a family business!**
- 9. If you're looking for a specific skill such as governance, personality profiling is a great place to start and is a great way to find flair**
- 10. Why wouldn't you want to implement governance such as role clarification if the lack of it could cause such distress and worry?**



## 6: Always take care of your greatest asset, your family.

Corporates are polished at telling a story. They invest time in making sure their brand is right and they market themselves ferociously.

In contrast, in a family business, family is the brand and it's a real privilege. Acting like a family with the same dynamics in play when running the business can be a downfall. Have an alter ego.

I always wonder what it would be like to walk into the board room where I work and act just as I would when I'm with my family! Like it or hate it, there are two different behaviours that make a success of each situation. Whilst combining the two may feel entirely authentic, in the corporate situation expected behaviour leaves little room for subjective decision making and in the family such behaviour would diminish heart-felt connections.

### 6.1 Having a vision as a family and understanding your core values is key to a successful brand

Saputo is a great example of a family owned business deeply rooted in family values regardless of its scale, yet it has found the right way to manage succession and give everyone in the family clear accountability. They moved from owners to shareholders by floating the company on the stock exchange in 1997 and completing its initial public offering. The family spirit is still alive despite numerous global acquisitions and to this day, the family still owns a large proportion of the shares.

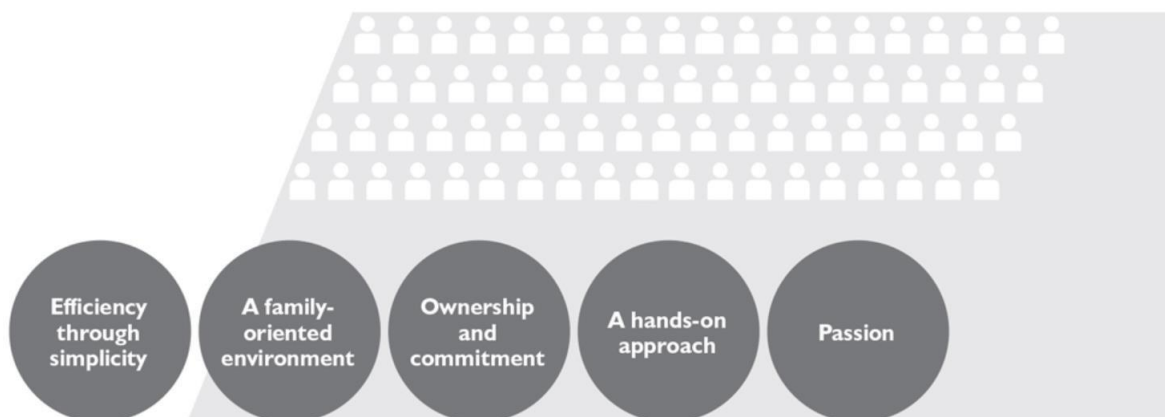


Figure 4: Saputo values

Source: [www.Saputo.com](http://www.Saputo.com)

In the short time I've worked for Saputo, one of the things I most admire is the method of goal setting and decision making.

They talk about dreams and how to translate that into reality through a strategy.

They acknowledge not all decisions are made from logic; being a family, there is emotion involved. They harness this but they have controls in place (moved from owners to part shareholders) to protect the business and support the family in continued success.



It's clear that vision and goals are essential to Saputo. All main events and communications are driven by these sentiments.

### **6.1.1 The benefit of a vision**

It's a given that a large-scale business will have a vision to build a strategy, to build actions and track against them. I've found that is rarely the case in a small family run business. I've seen family businesses struggle to articulate their values; they can easily tell you what they don't like but draw a blank when asked what they stand for.

However, I have seen this done well. Not only did an agreed vision build stronger connections as a family by learning about each other's wants and aspirations, but it also provided a foundation for the family business to anchor on. This helped family members all sing from the same hymn sheet and by sharing the vision externally to other employees, empowered and created a sense of belonging, providing clear direction.

### **6.1.2. Corporate grows a brand. Family nurtures a brand**

Corporate businesses see 'the brand' and decide how to market it as an entity. In contrast a family is the DNA of the brand; the individuals are the story and the make-up. Values are so deeply ingrained that they might not even recognise or know what really drives the way they make decisions. I can describe this in the NLP (Neuro linguistic programming) terminology of Associated and Disassociated. Disassociated doesn't mean completely disconnected and ambivalent, it just means you are viewing something from a different perspective looking in. Whereas when 'associated' you are 'in it', immersed. Although the perspectives are different, there are benefits of both.

When you run a business that produces food, as a family you automatically have a foundation of trust. The very thought of a family farm making your food conjures up images of care, nurture, safety, tradition. All the things you want to feel when buying something you're going to eat or drink.

The family values shine through, they are already there whereas a corporate works hard to establish them. However, uncovering what these values are in a family business is not always a straightforward process and not something that you can do over night. It takes time together as a family to articulate core values. Everyone has to feel the values reflect who they truly are. In a small family business the time required may be hard to find but it is vital.

External support through this process is essential and will give you the tools to guide you through.

## **6.2 Taking time to care for, understand and invest in each other – strong relationships are key for a healthy business**

Trust is built on great relationships. Managing external relationships is an art. I questioned how much time families invest in managing relationships internally and externally.

We might think that building relationships is simple and some might not even think about it at all. It's part of your everyday life and work. When people ask me what I do and I tell them that I'm a Procurement Lead for Milk some quite often ask, "So what does that actually involve?" My answer is communication and treating people with respect; it's the heart of what I do. It is why I enjoy my job so much and everything else hangs off this. But it takes work and self-awareness.



I find doing a stakeholder map is a great exercise. I literally write down each relationship, both external and internal and ask myself how healthy is that relationship? I consider how much trust there is, how frequently we talk, and notice anything that doesn't flow. This could be misunderstanding of each other's goals and values, or something as simple as not recognising how my actions impact our interactions. I'm not saying everyone across the industry must have the same values, but I do see a need to understand each other's views and take time to actively show you respect them.

### **6.2.1 Time spent on relationships**

I want to make a point of drawing this to everyone's conscious mind, and ask:

What are your relationships like?

- With your family
- With employees
- With all the people that visit your farm be it customers or your suppliers

How do you show respect to them all?

When working with your family, noticing how you interact with one another and identifying how others in the family like to be communicated with and what they respond to best to can be really effective. Removing the family hierarchy and replacing it with your business structure, just think to yourself, "How would I speak to my peer and not my 'little cousin'?"

Respect can be shown by:

- Talking openly and honestly with each other
- Listening to each other
- Valuing each other's feelings and needs
- Compromising
- Speaking kindly to and about each other
- Giving each other space
- Honouring each other's boundaries

### **6.3 Valuing relationships and people: people do business with people they trust**

Throughout my study tour, on many occasions I heard farmers talk about how they aspire to be a 'preferred partner'. This may be with a customer, a supplier, their partners in a business or even how they attract new employees.

It was clear that reputation was everything. They consciously thought about how their customers viewed them and if customers or suppliers talked about them in a way that matched their brand and values. What gave them the evidence, what was the marker?

#### **6.3.1 The Pye Group**

For the Pye Group in New Zealand, which runs several dairy units as well as an arable business and feeds business, being a preferred partner is part of their strategy. They value relationships and



people; it's at the top of their agenda. They know this must be number one if they are to have a chance of achieving their goals. Their language told me a lot, they talked about respect in the industry and in their local community. They had an understanding of the impact they have on other businesses and the environment. This told me they had morals. They cared.

Their hard work and commitment to their reputation was evident. One of the biggest issues family run farms face is finding and retaining good employees. The Pye group's reputation had them lining up. There was a known joke that someone has to die before you can join the Pye group. Their reputation made them the 'Google' of the farming industry in New Zealand.

Pye group also uses their brand to show consistency and build trust. For example, they developed a website, they took time to join up the branding and have logos on buildings, shirts, machinery – wherever they saw opportunity. I sensed a huge amount of pride in the brand. It created a community and moved them beyond just being a family business. The brand was its own individual identity and each member of the Pye group thought about how they could look after that identity, family member or not.

The Pye group also talked about 10 reasons why their business was a winner. Each and every one of these reasons comes back to people! It was:

The people who:

1. Undertake further training for personal development
2. Enjoy the social side of being part of the Pye group
3. Own the business and work alongside everyone else in the business
4. Are loyal and have worked for the group for 20, 30 or 50 years
5. Get involved in their local community
6. Are award winners and recognised by industry as excelling at what they do
7. Progress within our business – from tractor driver to part owner of central feeds
8. Get involved in their industry
9. Are champions of our brand and want to be 'just like Dad'
10. Are hard-working and dedicated making our business a success

#### **6.4 Internal investment in needs**

The Figure below shows Maslow's Hierarchy of Needs. I have added my text to the left of the triangle showing where the discussion above fits in with the needs Maslow describes.



**Figure 5: Maslow's Hierarchy of Needs**

**Source: Maslow**

## 6.5 Takeaways

### Great family farms:

- **Take a step back from time to time to get a better view of their business**
- **Invest in understanding their family business values (and say them out loud a lot)**
- **Are aware of the human need for recognition, connection and acknowledgement**
- **Look at the competition and know what 'good' looks like, be it a family or corporate business**
- **Review tasks, decisions and actions regularly and ask how they meet business values**



## 7. Conclusions

To conclude my study, I've listed my key points.

- 1) **Ownership is irrelevant;** it's all about the heart of the business, the passion from the people to succeed. I found that successful farming isn't just about land ownership and assets. It's about the way the business chooses to function and the values, beliefs, boundaries and vision that guide the business each and every day.
- 2) **Being able to invest in family members that don't necessarily fit the family mould.** What's more important, staying as a dairy business or staying as a family business? As long as you stick to your core values, your 'brand' can stretch and absorb other types of ventures incorporating all personalities and wants within the family.
- 3) **There's great opportunity being part of a family business,** the constant education at close range, the unquestionable investment in you as an individual, the opportunities to learn about 'business' from a very young age.
- 4) **Governance and Structure is vital.** I found the majority of successful businesses had people within it who had either worked away in a corporate role or were members of councils and boards or involved in an equity partnership that taught them the value of governance and structure.
- 5) **Strategy and vision help sustain a business.** It sees you through the difficult times and provides an anchor. It creates belonging. However, equally important in a family business is the process you go through to create it. Invest time in this and see the benefits.
  - It is really clear that without a known 'why' for actions taken, the family business has no anchor. The 'why' acts as the roots for the business.
  - It's not just about the legacy, it's about enjoying the journey and being passionate about what you do.





## 8. After my study tour

Ironically as I came towards the end of my travels and began to summarise my findings, Dairy Crest (PLC) was acquired by Saputo (April 2019) a family owned business.

The big question I am sure everyone will ask me is, “So does that mean you will one day return to the family business?”

As much as I consider myself to be part of my family business, at present, I’ve made the choice to work in the corporate world. As much as the two are closely associated (farming and dairy processing) it doesn’t translate to me being intrinsic to the family business as much as I’d like it to! I know the family business has evolved whilst I’ve been learning new skills and if I wanted to return, I would need to manage my transition well and apply some of my own conclusions from this report. I also can’t assume there will automatically be a place or a need for me in the business, unless there develops a clear role or skill gap.

However, that said. If I do decide to return to the family business, having been through my Nuffield Farming study, I understand the importance of outlining my expectations upfront, my own personal aspirations and my view from my corporate experience. My family members need to understand my skill value and welcome me into the business.

At present and for the foreseeable future, I want to continue to embrace the opportunity and rich experience that comes with working for another family business. That is Saputo. Meanwhile I continue to remain actively involved in supporting my own family in introducing governance and taking the business to the next level, and supporting my family in building a strategy to help take the business forward into the next generation.

Aside from my own career and family business, I am going to use the experience that Nuffield has given me and the contacts I have made along the way as a spring board to get more involved in the farming community. I hope to achieve this through working together with Dairy Crest Direct, which is the farmers’ representative for our Davidstow farmers in the South West, or through workshops or working with individual families to help them create a vision and think about what their values are and how these impact on their everyday lives from both a professional and a personal point of view.

I would also like to encourage younger people not to be afraid to leave the family business and build experience elsewhere, whilst knowing that there is a way to return to the family business at a later date. I would like to mentor or support the younger generation who might be looking to return to the family business and understand how best to effectively implement this for all the family involved.

Finally, and most important of all in the next year or so, Josh and I will be busy starting our own family, with our first child due at the end of March 2020. I will definitely be following my Nuffield Study advice myself at some point in the future!

### Alexa Parker



## 9. Acknowledgements & Thanks

Firstly, a huge thank you to the Nuffield Farming Scholarship Trust for giving me the opportunity and freedom to explore my chosen topic. A special thanks goes to the Trehane Trust for sponsoring my Nuffield Farming Scholarship.

I would like to thank my employers Saputo Dairy UK, formerly Dairy Crest, for all the support and allowing me the time to carry out this study, which I hope will be of benefit to them, their farmer suppliers and the dairy industry.

Thanks also to Mark Allen OBE and Tony Evans for believing in me and supporting my application, Chris Thomson for being an incredible manager and mentor over the years.

Thank you to Josh my husband for supporting me from the outset, for abandoning him for two months whilst he had to complete the sale of and pack up our flat!

I would like to express gratitude to my parents for striking the balance of providing opportunities and allowing me the freedom to follow my own path.

Finally thanks go to all those who I visited and have learnt so much from during this journey.



## 10. References

### Figures:

**FIGURE 1 (p10):** (Tuckman,1965) (Spencer, J.and Pruss, A.1992) – Forming, Storming, Norming, performing: image that depicts the stages of transition for any team or change. Taken from google images:

[https://www.google.co.uk/search?q=\(Tuckman,1965\)+\(Spencer,+J.and+Pruss,+A.1992\)&source=lnms&tbn=isch&sa=X&ved=2ahUKEwjUlemRnbvAhUCY8AKHft4BMkQ\\_AUoAXoECA0QAw&biw=1280&bih=575&dpr=1.5#imgrc=9N1aMfs6o2v3vM](https://www.google.co.uk/search?q=(Tuckman,1965)+(Spencer,+J.and+Pruss,+A.1992)&source=lnms&tbn=isch&sa=X&ved=2ahUKEwjUlemRnbvAhUCY8AKHft4BMkQ_AUoAXoECA0QAw&biw=1280&bih=575&dpr=1.5#imgrc=9N1aMfs6o2v3vM)

**FIGURE 2 (p12):** Governance board room scene – taken from Saputo website:

<https://www.saputo.com/en/our-company/governance>

**FIGURE 3 (p15):** Photo taken by the author at the Kalcevic home in December 2018 – Colorado, USA.

**FIGURE 4 (p20):** Saputo values – taken from the Saputo website.

<https://uk.saputo.com/about/values/>

**FIGURE 5 (p24):** Maslow's Hierarchy of needs: (with additions to explain the link to internal investment needs) Taken from google images: <https://www.coachilla.co/blog/the-new-hierarchy-of-needs>

### Quotes:

#### Quote 1: Tuckman 1965 (p10)

<https://www.google.com/search?q=tuckman+forming+storming+norming+performing+model&oq=Tuckman%3B+Forming+-+Storming+-+Norming+-+Performing&aqs=chrome.1.69i57j0l7.11330j0j8&sourceid=chrome&ie=UTF-8>

#### Quote 2: Cadbury 1992 (p12)

Cadbury Sir Adrian (1992) Report of the Committee on *The Financial Aspects of Corporate Governance*, Gee & Co Ltd, UK

Sir Adrian Cadbury (1992) defined corporate governance as 'the whole system of controls, both financial and otherwise, by which a company is directed and controlled'. Sir Adrian Cadbury chaired the Committee which produced the 1992 Report



**Quote 3 (p13):**

Dairy NZ - “The process of leading, controlling and directing a business so that it delivers a desired set of outcomes for the owners”. Taken from the Dairy NZ website:

<https://www.dairynz.co.nz/business/planning/governance/>

**Quote 4 (p14):** *Louis L’Amour, ‘Riding for the Brand’.* (p14)

*Published by Penguin Random House LLC , New York. Jun 01 1993. ISBN 9780553281057*

<https://www.penguinrandomhouse.com/books/96683/riding-for-the-brand-by-louis-lamour/>

A novel that the Kalcevics introduced to me that helped inspire them as they worked through the transition, in understanding their purpose and their values. The old western cowboy ‘brand’ is well known in the rural western states of the US. The ‘Brand’ represents pride, duty and stewardship, which is inspired by loyalty and dedication.

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Southill Farm, Staple Fitzpaine, Taunton, TA3 5SH  
T: 01460 234012 | E: [director@nuffieldscholar.org](mailto:director@nuffieldscholar.org)

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