

FAMILY BUSINESS DELEGATION OF AUTHORITY AND REGULATIONS FOR BOTH FAMILY AND NON FAMILY MEMBERS

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ABSTRACT:

Family businesses are the catalyst of the economic system and established with the core belief of continuity and growth. Various challenges encounter family businesses through their expansion; the management structure that is traditionally centralized, delegation of authority and the incorporation of non family members. These factors play a vital role in family businesses in terms of innovation, profitability and growth potentials.

The SEAM methodology implemented in this research is in the form of action based intervention that tackles dysfunctions that could result from centralized management structure, delegation and relationship with non family members at management and Production level. The tackled qualitative dysfunctions are transformed into financial values in the form of hidden costs that do not appear in the financial statements but hampers the family business profitability and growth potentials. SEAM provides an evidence for family business owners to take actions in planning, operations and human resource structure to increase efficiency and convert hidden costs into value added activities.

Keywords: Centralized, delegation, family business, decision making, SEAM, action based research, hidden costs, value added activities.

INTRODUCTION

Family businesses are known to be the oldest form of businesses constituting 66 to 90 percent of enterprises worldwide, ranging from the smallest and largest, youngest and eldest enterprises in developing and developed economies (Chua et al., 2004; Fernandez-Aroas et al., 2015; La Porta et al., Peterson-Withorn, 2015) contributing to around 70 to 90 percent of Global GDP. In that prospect a growing awareness is emerging among policy makers and researchers of the family business role in creating new jobs, incubating new businesses, and promoting economic development of local communities (Astrachan, Zahra, & Sharma, 2003; Heck & Stafford, 2001).

In the early years, family business fell into the sociology category, and later into a small business management category, neither of which allowed the field to become distinctive. As a result, the literature on family enterprises is not as voluminous as in other management areas (Bird et al. 2002). General topics of interest have received particular attention, including succession (Handler 1994; Lansberg and Astrachan 1994; Sharma et al. 2003), corporate governance (Dino et al. 2005; Miller and Le Breton-Miller 2007), and strategic management (Chrisman et al. 2005). Relatively more effort is needed to address the complexity of family companies as their survival and performance depends heavily on the effectiveness of the management processes and structure that relates to the delegation of authority. For instance, previous research indicates that financial performance and innovation outcomes are significantly related to horizontal integration and levels of hierarchy (Nahm et al. 2003).

In Lebanon, family businesses are the core base of the economy constituting 85 percent of the private sector, accounting for 1.05 million of 1.24 million jobs (Fahed, 2006). This remarkable dominance is shaped by; strong family oriented culture, historical and cultural values (Salloum et al. 2013) Although they have contributed to the growth and stability of the Lebanese economy they are short-lived and only around 10percent transfer to the third generation. In most cases, this failure to transfer across generation is attributed to a rigid centralized management process and the lack of authority delegation to experienced non family members.

Given these circumstances and the impact of family businesses on the Lebanese economy, it is relevant to research and explore the implications of family business centralized organizational structure and the delegation of authority to non family members as they expand and grow. In this research, I will implement the Socio Economic Approach to Management SEAM methodology in a form of action research. A cyclical approach to organizational development and change management; where actions are based on evidence and learning. Through the action based intervention I will be able to assess the family business centralized structure and the delegation of authority to non family members impact on the organization management process and productivity.

The importance of this methodology is that it applies the qualimetrics approach where qualitative information is gathered from the organization, dysfunctions hindering performance and profitability are identified, and their associated hidden costs are translated into financial figures. It is a unique approach in cost reduction based on various implemented actions to handle the dysfunctions that stem from the issue of centralization, delegation of authority and family members and non family members relationship in the management and operation of family business. The outcome is evaluated based on the extent of recycled dysfunctions and the effectiveness of the value added activities.

PROBLEM STATEMENT

Family business integration of non family members into its management and operational team is beneficial for the economic performance and growth of the firm. But a centralized management structure in family businesses and it's relation to the delegation of decision making to non family members hinders NFM's performance and innovation potentials. Also, the extent

and nature of Family Members involvement in top management team impacts the activities and practices of the firm.

Resulting in weak communication networks, inefficiency among departments, low employees performance and time management redundancy directly affecting the family business productivity and growth potentials.

AIM

Family businesses whether small, medium or large are the driving engine of socioeconomic development in all market economies. They played a vital role in employment, income generation, and wealth accumulation. Family firms are the dynamism and strength of the economy, long-term stability and sustainability. They involve three overlapping elements; family, the business, and the ownership that makes them different from other types of businesses. Therefore the success and continuity of family business should be of great concern as it is an essential catalyst for economic growth and sustainability. In spite of these promising qualities, it is also known that almost 30% of family businesses survive to the 2nd generation while only a third make it to the 3rd generation.

My economic background urged me to research family businesses from a management context; incorporating non family members into managerial positions, centralization and delegation of authority to non family members. In this research I will investigate to what extent these factors are affecting the management process and growth potentials of the organizations by tackling the related dysfunctions and assessing their hidden costs through the implementation of the SEAM Methodology. The intervention process will be implemented in a Lebanese family business that was founded in 1881, expanded, developed and dominated the market share of pastries in Lebanon over the years. It has become an icon name for oriental sweets in Lebanon and the Middle East “Abdul Rahman Hallab & sons”.

Researching and intervening in a family business through the application of the qualimetrics research-intervention method will enhance my research skills that relates to my current field of work as an economic instructor at the “American University of Technology”. Also, the intervention process will entitle me to earn and experiment consultancy techniques and methods to be implemented in that context in the future.

HYPOTHESIS

- *Core Hypothesis*

Family businesses as they expand and incorporate non family members tend to preserve their authority and familiness through centralized structures and less delegation to non family members versus family members. However compliance with the rules of the game and delegation influences the performance and efficiency of the non family members.

- *Descriptive hypothesis*

The extent of centralization and discrepancy in delegation among family members and non family members lead to multi dimensional dysfunctions such as working conditions at production units, lack of communication between managers, supervisors and chefs, weak communication network among departments leading to hidden costs such as staff turnover, absenteeism, productivity gap.

- *Explicative Hypothesis*

The root causes of un-captured growth potentials resides in the lack of sensitization; in simple terms dysfunctions resulting from centralization and low delegation to non family members are not tackled and their relative hidden costs are not valued. The family business is unaware of their impact on the productivity and performance potential. Another factor is the lack synchronization of actions between family members and non family members due to lack of empowerment.

- *Prescriptive Hypothesis*

Empowerment delegated to non family members lead to greater efficient and productivity. The management tools implemented along the diagnostic stage can assist in the delegation process and the required control to achieve the desired outcome. Through a recyclable process of dysfunction and management change low added value activities can be transformed into high value added tasks that contribute to more efficient productivity level and management performance.

RESEARCH FIELD

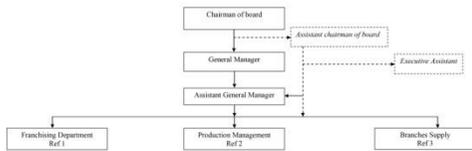
The selected field in this research relates to a Lebanese Family Business that operates in the food industry; pastry market. It is a highly competitive market with hundreds of traditional pastries throughout Lebanon that range from small, medium and large establishments. The top market dominants are Abdel Rahman Hallab, Rifaat Hallab, Bohsali Freres, Amal Bohsali, Al Baba, Sea Sweet and Doueihy all competing in terms of taste, ingredient quality, freshness and prices.

Abdel Rahman Hallab, a family business established since 1881 in Tripoli Lebanon bakes and sells a wide range of exquisite and tasty traditional oriental sweets with incomparable deliciousness that entitled Abdul Rahman Hallab to earn a high reputation in Lebanon and the Middle East region. The success story continued through the succession of Abdul Rahman Hallab & sons generations whom, besides maintaining the tradition by preserving the authenticity of the sweets, they strived for renewal to keep pace with modern life and the market demand in widening the variety range of sweets to include; sugar free baklava and maamoul “Hallab Lite Sweets”, confectionaries, kashta, chocolate, cake, ice cream and bakery. All pastries are unique for their authentic taste, fresh ingredient, quality and skillfulness in preparation. The secret recipe probably lies in the mixing of the three that entitled Abdul Rahman Hallab & Sons sweets an unrivaled name in the oriental sweets market. Since 1980 Abdel Rahman Hallab & sons started an expansion and development scheme. They have established their factory plant and headquarters in Tripoli, since then variety of pastries were added to the product line in addition to the Ashta factory.

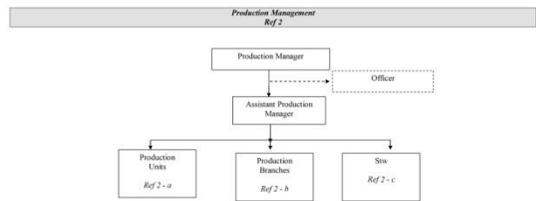
Sales orders were remarkably high in the Lebanese market and worldwide via online orders promoting for franchise branches to widespread in Lebanon and overseas; nine across Lebanon, three in Kuwait and four in Saudi Arabia.

This remarkable expansion and growth was a real challenge for the family business, strategic plans should have been developed in the expansion process to shift the management from being reactive to be more structured and proactive. This lack of structured plan resulted in wasted potentials that top management and executives are currently experiencing. Even though, Abdel Rahman Hallab & sons are market leaders there must be a master plan that coordinates the expansion to reach the desired potentials. Also, certain traditional family businesses practices should be developed for a better empowerment of efficiency and performance. Non family members are being handled managerial positions to team up with family members in handling the current challenges. In that context the top management is aware of the need for management change through the SEAM methodology to tackle the hidden potentials in performance and production.

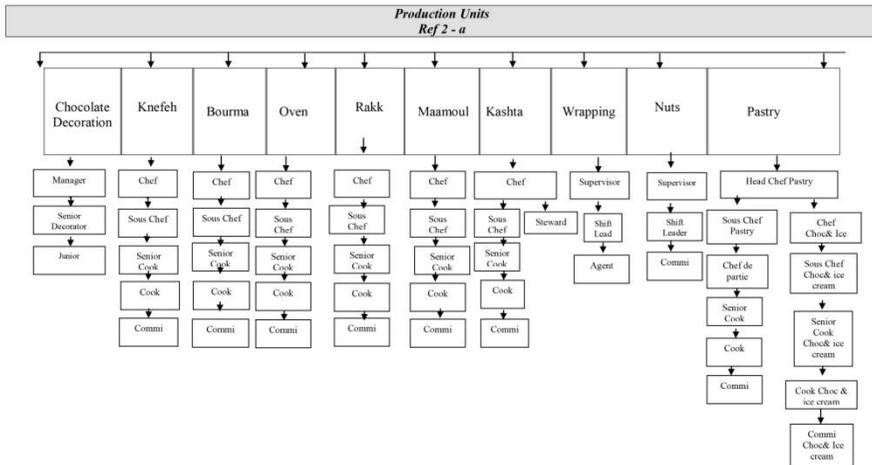
Hallab 1881 sal Organizational Chart



Hallab 1881 sal Organizational Chart



Hallab 1881 sal Organizational Chart



RESEARCH METHOD AND QUESTIONS

The research questions that will be used:

- 1- How much authority should be delegated to non family members?
- 2- Does delegation of authority to non family members in managerial position promote their practices and efficiency?
- 3- What is the impact of non family members' efficient performance on family members?
- 4- Does communicating the family business values and objectives to non family members facilitate the cooperation among both parties?
- 5- Should family businesses become less centralized as they expand and grow?
- 6- To what extent centralization in family businesses affects innovation and makes the organization less proactive?

The above stated research questions can best be explored through the use of the socioeconomic approach to management (SEAM) methodology. It is a cyclical approach to organization development and management change where actions are taken based on evidence and learning. The implementation of intervention research in a family business is practical, operational, and useful for managers and executives in exploring the impact of centralization and delegation of authority on the business management performance and production.

The SEAM methodology is based on three integrated categories for effective change at an organization; Improvement Process, Management Tools and Periodical Political and Strategic Decisions. The Improvement process relates to the diagnosis of the existent dysfunctions that relate to centralization and delegation of authority to non family members, development of projects, implementation, and evaluation activities. Within the development process a selection of socioeconomic management tools such as time management, competency grid, internal-External strategic Action plan, priority action plans, strategic piloting log book are used to align the strategic and political dimensions of the organization in terms of strategic choices, Technological organizational and procedural changes, choices of management system, strategic development of human resources.

For the intervention to be fully effective it should undergo the four major phases of the improvement process: diagnostic, project, implementation of projects and evaluation of results. (Savall, H & Zardet, Bonnet 2008).

The diagnosis stage is the most labor intensive and diagnostic preparation often takes the majority of the intervention time. The diagnostic intervention will flow two ways; top down when top managers and executives of the family business begin and support the change. Bottom-up when all front-line managers, supervisors and employees are engaged in identifying and reducing hidden costs and performance issues. The intervention will begin with the commitment of top management to model in new practices. Then the intervention will be extended to the rest of the organization in a highly participative manner.

It is a process that functions with the organization as a whole through the use of Horivert (horizontal-vertical) method (Savall, H & Zardet, Bonnet 2008). The Horizontal intervention will target the management team: chairman, general manager, production managers, and human resource manager of the

organization while the vertical intervention will aim for front line managers (production managers), Chef, Sous Chef, Senior cook, cook, commi of two production units. Interviews will be conducted to reveal dysfunctions and value their related hidden costs. Quotes from interviews will be themed according to the six dysfunctions categories: the working conditions, work organization, communication-coordination-cooperation, time management, integrated training and strategic implementation.

The ISEOR database consisting of 3,450 categories of dysfunctions will be used to guide the analysis. The use of the data base is the application of a generic contingency principle to the specific organization (Savall, H & Zardet, Bonnet 2008). In the process, discrepancy is tackled between the situation expected by the actors (employees, managers, customers, and shareholders) and the actual situation. The main symptoms of hidden costs stemming from dysfunctions include absenteeism, work accidents and occupational illness, staff turnover, non-quality (Savall, H & Zardet, Bonnet 2008). Then diagnosis in the vertical level will proceed by assessing the collected data to determine their financial consequences (excess salary, overtime, overconsumption, overtime, non-production and risks)

The identified dysfunctions are expected to result in hidden costs not stated in the family business balance sheets and yet they hurt the productivity and efficiency. A methodical process is applied in the calculation of the hidden cost based on the socioeconomic principle developed by the ISEOR researchers called “qualimetrics”. Taking qualitative information from interviews and translating them into financial figures (Savall & Zardet, Bonnet 2011). It is unlike other approaches of cost saving estimation both people and finances are factored into the analysis. The outcome not only represents the extra costs but also earnings losses and opportunity costs. Also, direct observations of operations are conducted for a thorough analysis of the dysfunctions and their consequences to verify whether there are exceptional or recurrent.

Once the data is fully analyzed management and employees’ remarks about the stated dysfunctions and problems are carefully noted, leading to the mirror effect where all participants will be aware of the need to prevent dysfunctions (Savall, H & Zardet, Bonnet, 2008) . Then an in-depth analysis of the root causes of the dysfunctions is carried to provide an expert opinion to management in identifying the most appropriate measures for reducing dysfunctions and enable the leadership team assess to what extent the organization operations and production are not reaching their potentials (Savall, H & Zardet, Bonnet, 2008).

Within the process managers will be introduced to the socioeconomic tools that include: time management tool, competency grids, internal/external strategic action plan, priority action plans, and periodically negotiable activity contracts (Buono & Savall, 2007; Savall & Zardet, 2008). In alignment with the Strategic and political decisions that comprise the direction- setting, operational, structural, and human resource design features of the organization.

The overall results of the Horivert and mirror effect pilot top managers to agree to work on projects within their scope to reduce hidden costs and to be supportive of the vertical interventions- moving the analysis and correction of hidden costs down through the organization.

Participants will start to work on projects selected by the leadership group as a mark of supporting the need for change at their level of operations. Through the horizontal project focus group managers will learn to develop problem-solving abilities and team management; they will build up skills through the socio economic project that enhances creativity and innovative solutions to prevent dysfunctions (Savall, H & Zardet, Bonnet, 2008). The project group will foster communication and negotiation between different participants to train themselves to share a common language and common grounds as well as to negotiate solutions.

At the same time the vertical project focus groups involve the production manager, chefs and sous chefs to develop solutions at the production department level (Savall, H & Zardet, Bonnet, 2008). A detailed SEAM analysis within two product lines will be conducted. At each level, actors of the same product line will follow the process in the same order: diagnosis, mirror effect, one or more projects developed by these same actors with the goal of reducing hidden costs. Vertical diagnosis provides detailed records of the extent hidden costs and underperformances in the production unit.

For an effective implementation of the assigned projects value added analysis should be created while avoiding the duplication of existing actions. Also, it will be necessary to allocate intangible and tangible resources in the process, intangible investment could be in the time devoted to low value added tasks that should be reallocated to the project. Tangible resources could be new equipments or new technological system (Savall, H & Zardet, Bonnet, 2008). Finally an evaluation of the project implementation outcome should be conducted to assess the positive effect and the necessary improvements to be put into action such as; empowerment through collaborative delegation at all levels, upgrading skills through integrated training, enhancing alertness to improve relevant strategic decisions (Savall, H & Zardet, Bonnet, 2008). Also, to determine if hidden costs have decreased and whether value added have been created. Further, to develop new information on the dysfunctions and to integrate it in the transformation process. It will enable management to learn how to improve the organization operations functioning on continuous basis. The evaluation of results will be based on comparing visible and hidden costs and performance before and after implementation of a given project. (Savall, H & Zardet, Bonnet, 2008)

OBJECTIVE

I have negotiated the implementation of the intervention research with the general manager, financial controller and human resource manager of the selected family business in a process of three meetings. Upon a verbal approval I provided an informal research contract that states the phases of the intervention. The management approved and supported the diagnostic stage and the application of the management tools. The Financial controller is looking forward for the hidden costs financial outcome. While it is not guaranteed that the implementation will take place it is based on the diagnosis outcome and designed projects.

The objective of applying the intervention research at a family business is to investigate and assess to what extent family businesses incorporation of non

family members and reduction of centralized management affects performance and efficiency at managerial and production level. At Adbul Rahman Hallab & sons I will investigate the centralized management process and delegation among family and non family members along with the production management and production units. The action based intervention process, converts hidden costs into value added activities, strengthen operational and human resource structure, increase production that will enable the organization to adapt to the challenges of expansion as well as the industry.

The first phase of the action based intervention is the diagnostic stage that processes through the use of the Horivert (horizontal-vertical) method. The organization will be clustered horizontally (cluster A) and vertically (cluster B) in alignment with the family business strategy. The horizontal intervention cluster includes the Chairman, General manager, Production managers, Human resource while the vertical intervention cluster will aim for front line managers (production managers), Chef, Sous Chef, Senior cook, cook, commi of two production units. Anonymous Semi structures interviews will be conducted for duration of one hour each to reveal dysfunctions and value their related hidden costs. Quotes from interviews will be themed according to the six dysfunctions categories: the working conditions, work organization, communication-coordination-cooperation, time management, integrated training and strategic implementation. discrepancy is tackled between the situation expected by the actors (top managers, front line managers, employees and shareholders) and the actual situation.

BIBLIOGRAPHY AND POSITIONING

Several definitions of Family Businesses are stated by researchers on family businesses, a common factor among all definitions is that they are based and focused on the fact that are “family owned and family managed” (Chrisman, Sharma, 1999) the existence of non family members and their impact on management activities was not much of a concern or interest to researchers. Very few articles and papers articulated the contribution of non family member’s management activities and practices in family firms. Previous studies focused on how a family CEO should adapt to working with non-family members, and the difficulty of delegating managerial responsibilities to non-family members (Firnstahl, 1986; Goffe and Scasse, 1985; Hofer and Charan, 1984; Mathews, 1984). On the other hand, Dyer (1989) considered how to facilitate the adaptation by the non-family manager to the family firm's culture and goals.

Certain studies highlighted the positive and negative sides of family members and non family members being the firm’s managers. Family members exhibited some positive traits such as extraordinary commitment (Horton,1986), warm and friendly intimate relationships within the management teams (Horton 1986), deep firm-specific tactic knowledge acquired from the early involvement in the firm (Lane & lubatkin,1998) and the creation of a synergy in the top management team due to higher cohesion, potency, and positive task conflict (Ensley & Pearson, 2005).

Also, Goody (1996) alleged that family members’ predominance facilitates growth as members of succeeding family generations are available to open new branches of the company. On the other hand, other studies indicate the

fact of primarily limiting management positions to family members could lead to hiring unqualified members that cannot be easily dismissed (Dunn, 1995). Whereas qualified non family members may avoid family firms as their potential for growth, promotion and remuneration is hampered (Covin, 1994a, b; Donnelly, 1964; Feigener *et al.*, 1996; Horton, 1986; Stewart, 2003). Further, some studies investigated the impact of non family members that results in “creative destruction” When they contribute to firm growth and weaken family managerial control (Morck and Yeung, 2003; Morck *et al.*, 2000; Olson, 1963, 1982, 2000). In consequence, family members might discourage or prevent non family members from being creative and innovative hindering the company growth. In respect to the benefit that can be reaped in incorporating qualified non family members several researchers focused on the need to clearly communicate to non family members the existing family values and objectives (Astrachan and Kolenko, 1994; Dyer, 1989; Gubitta and Gianecchini, 2002). Due to the negative and positive facts that resonate about the inclusion of non-family members in family businesses, writers stressed on the need to socialize new non-family members, clearly communicate to them existing family values and objectives, and tie the interests of the NFM's to the firm, for example via stock ownership and board membership (Astrachan & Kolenko, 1994; Berenbeim, 1990; Dyer, 1989; Gubitta and Gianecchino, 2002; Sirmon & Hitt, 2003).

A study conducted by Lussier and Sonfield (2009) regarding the inclusion of family-member managers and non-family member managers in family businesses, and the relationship of this variable to certain management activities, styles and characteristics. Lead to the primary conclusion that the influence of “familiness” and the “family system” in family firms (Chrisman *et al.*, 2005b) is strong enough to minimize the influence of “non-familiness” and “professional management” that non-family members may bring into a family firm. Thus, the inclusion of a greater number of non-family members as family businesses expand can have positive implications; in terms of family members, it encourages a culture of long-term, goal orientation, trust, and mutual understanding. While for non-family members, it also has a positive effect on family firm innovation due to the diversity and professionalism of the members of the non-family group (Famoso, Maseda, Itturalde, 2014)

In all type of businesses the structure is a form of internal framework where decisions are made and actions are taken. Some authors refer to dimension of structures such as centralization, formalization and complexity (e.g., Child 1975; Fredrickson 1986), specialization (Pughet al. 1968), and integration (Galbraith 1973). Mintzberg (1983) proposed five ideal types of organizational structure: simple structure, machine bureaucracy, professional bureaucracy, divisionalized form, and adhocracy. Each type consists of combinations of various structural dimensions. A simple structure consists of high centralization combined with low formalization and low specialization. The structural conditions in the organization can foster or impede the managerial processes. For instance, authority relationships may hinder the flow of information because of hierarchy or reporting requirements that stem from an organization's structure. This, in turn, can slow down information processing or prevent organization members from getting information that might be useful for effective decision making (Tushman and Nadler 1978). Centralization that refers to how

concentrated decision making in an organization is a structural component that can narrow a firm's perspective to a few top decision makers and limit alternative perspectives.

A significant challenge for family businesses is to determine how much authority to delegate to non family members and to what extent centralized power should be exercised. Conflicts arising from power relationships and issues of authority can impede progress (Kanter et al. 1990). Bureaucratic rules and outdated procedures can also create conditions that make it difficult for organizations to succeed (Lawler 1996). Thus, it is vital for the family business success to create an exile organizational structure even though it may lead to other problems due to limited oversight or lack of information. The general finding in the literature is that family firms are more controlling than their non-family counterparts (e.g Dyer 1986; Daily and Dalton 1992).Based on Feltham et al. (2005)finding 65% of all major decisions were centrally made through examining of the role of the single decision maker in family businesses. Several authors considered that centralized decision making undermine the ability of the organization to pursue opportunities (i.e., Hall et al. 2001) or hinder the motivation of the work force (Quinn and Spreitzer 1997). Also, based on Covin and Slevin (1988) finding centralized firms that are specialized and formal, have lower levels of innovation, are less proactive, and risk averse. As Chittoor (2007) noted control-oriented family businesses that are hesitant to decentralize and delegate authority are criticized for being reluctant to professionalize management processes (e.g., Chittoor and Das 2007).

A study conducted by Martin and Mckelvie revealed that the overall management practices in family firms are more centralized than those in non-family firms. "Family firms exhibit significantly less delegation than non family businesses". Family businesses and non-family businesses delegate all responsibilities differently most significantly the employee terminations. Family businesses managers place that responsibility upon the supervisors while non-family businesses managers handle the terminations themselves. Family firm managers tend to maintain control over tasks that are typically delegated in non-family firms. Also, the study highlighted that both family and non-family businesses demonstrate high level of managerial centralization, non-family firms tend to be more empowering than family firms. Also, the type of decisions made vary upon the extent to which the decision is centralized. For instance, family firms retain centralized operational decisions and delegated employment decisions. A vital reason behind delegating employment decision is to maintain non-family employee morals and dismiss the reputation of being biased. Martin and Mckelvie noted that this behavior would enable the family firm to "professionalize" their decision making (Stewart and Hitt 2012) as a mean to overcome potential "negatives" of being part of a family firms. The decentralization of employment decisions allow family firms to discipline underperforming family members (Ram 1994) and potentially increase the commitment of non-family employees (Barnett and Kellermanns 2006).

Intervention Time Line

Task Name	Start Date	End Date
Negotiating SEAM intervention	March -2017	April-2017
Submission of Doc. A	January-2017	February-2017
Approval of SEAM intervention	March -2017	April- 2017
Submission of DOC B	February-2017	April-2017
Diagnostic stage: Horivert intervention based on interviews, dysfunction quotes and themes	May-2017	July-2017
Management tools: competency grid, time management, priority action plan	May-2017	July-2017
Hidden costs estimation	July-2017	August-2017
Mirror effect meetings	September-2017	October-2017
Expert Opinion (in-depth analysis of the root causes of the dysfunctions)	October -2017	November-2018
Formulating a basket of solutions based on dysfunctions and their root causes	November-2017	March-2018
Evaluation of results	March-2018	April-2018
Writing of Dissertation	May-2018	June-2019

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