

ENTERPRISING RURAL FAMILIES ROLE ASSESSMENT

Following is a list of roles that people can play in the family and/or business. Identify other roles for your family and family business.

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|------------------|--------------------|--------------------|--------------------|-------|
| Owner | Visionary | Compliant one | Marketing manager | _____ |
| Manager | Peacemaker | Problem identifier | Purchasing manager | _____ |
| Social butterfly | Employee | Detail person | Process analyst | _____ |
| Thinker | Idea person | Fun lover | Production manager | _____ |
| Favored child | Successor | Negotiator | Legal advisor | _____ |
| Caretaker | Rebel | Scapegoat | Financial advisor | _____ |
| Hard worker | Savior | Attacker | _____ | _____ |
| Bookkeeper | Good business head | Devil's advocate | _____ | _____ |
| Organizer | Problem solver | Comptroller | _____ | _____ |
| Trouble maker | Risk taker | Inventory control | _____ | _____ |
| Super achiever | Decision maker | manager | _____ | _____ |

In the table below write the name of a business member at the top of each column. Include all members of the business, both family and non-family who are involved. Then list the family and business roles that each person plays. Some non-family business members (employees, partners, etc.) might still play a role in family dynamics and should be listed as such. Some family members which are not directly members of the business may exert an influence on the business and, if so, should be listed. If you need more space use additional pages.

| Person: | | Person: | | Person: | | Person: | | Person | |
|--------------------|----------------|--------------------|----------------|--------------------|----------------|--------------------|----------------|--------------------|----------------|
| Family Member? Y N | | Family Member? Y N | | Family Member? Y N | | Family Member? Y N | | Family Member? Y N | |
| Family Roles | Business Roles | Family Roles | Business Roles | Family Roles | Business Roles | Family Roles | Business Roles | Family Roles | Business Roles |
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| Person: | | Person: | | Person: | | Person: | | Person | |
|---------------------------|-----------------------|---------------------------|-----------------------|---------------------------|-----------------------|---------------------------|-----------------------|---------------------------|-----------------------|
| Family Member? Y N | | Family Member? Y N | | Family Member? Y N | | Family Member? Y N | | Family Member? Y N | |
| Family Roles | Business Roles | Family Roles | Business Roles | Family Roles | Business Roles | Family Roles | Business Roles | Family Roles | Business Roles |
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1. How do these roles affect your family and your business?

a. Positive results:

b. Negative results:

c. Other results

2. Are there roles that are needed in the business or family that are not being filled?

3. Are there roles which are being duplicated, causing inefficiency?

4. Are positions held by the most qualified people?

5. Do family members know their specific roles?

6. Do family members understand their responsibilities?

7. Do family members understand how their responsibility affects the entire operation?

8. Do family members understand how their responsibilities impact the rest of the team?

9. Does harmony exist amongst and between all the team members?

Adapted from *Managing the Multi-Generational Family Farm*, published by Agriculture and Agri-Food Canada and *A Guide for Developing Best Practices For Farming with Family* by Jim Soldan and Lorne Owen.