

Decades of Educational Excellence: A Case Study of A Successful Family-Owned Higher Educational Institution

MARIA LUZ TABUENA MACASINAG

<http://orcid.org/0000-0003-2937-5781>

maria.luzdlsu@gmail.com

Bicol College

Daraga, Albay, Philippines

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ABSTRACT

This study critically examined a successful family-owned higher educational institution towards identifying the attributes and practices that may have led to its success. This research was confined to a private, non-sectarian, family-owned higher institution of learning that has been operating for more than fifty years, had only one founder, and had at least two transitions in terms of generation. Findings revealed nine themes – the presence of a positive (1) corporate culture and values, (2) shared vision, (3) corporate social responsibility, effective (4) corporate governance, a strong (5) human resource development program, a transformative (6) style of leadership, (7) strong family culture, (8) succession plan and effective (9) business strategies, attributes and practices contributory to the success of a family-owned higher education institution. Significantly, the dominant theme was anchored on corporate culture and values, which reflect the family orientation not only of the leaders in the institution but also the general culture of the Filipino people. It is concluded that these various themes form part of the holistic model that can appropriately analyze family firm performance

in the field of education in terms of sustainability through several generations. Ultimately, sociological factors dominated this study results, reflecting how culture impacts different processes and structures in a family-owned Higher Education Institution.

Keywords — school administration, educational leadership, attributes, family-owned, success factors

INTRODUCTION

A family business represents a legacy of the first or past generation of owners (Frankenberg, 2008). It is a business owned, controlled, and managed by one or more of the family members who are actively involved in running the company activities. It gives the family a sense of pride and serves as the glue that holds the family members together and connected. It is a product of years of hard work, embodies success, and is a symbol of the family's achievement (Pappas, 2017). Family businesses are vital for economic growth in many countries. They perform an essential role as providers of innovation, and opportunities, and act as key players for local and national development (De Massis, Di Minin & Frattini 2015). The family firm plays an important role in the economy of a country with emphasis on the consequences of their business activities in the integral development of society (Donckels & Fröhlich 1991; Basco 2015). Studies have shown that family business plays a significant role in terms of job creation (Pistrui et al. 2001; Anderson & Reeb 2003). This kind of company accounts for 85 percent of all companies all over the world, 65 percent of the employment rate in Europe, and 60 percent of the employment rate in the United States (Barroso Martínez, Sanguino Galván, & Bañegil Palacios, 2013). The life expectancy of a family business is 24 years compared with 45 years of a public company. Most family businesses do not survive the first five years, and only 30 percent are successfully transferred to the next generation. Only one in ten makes it to the third generation (Te & Perryer, 2011). Successful family business, as one that has existed for at least ten years, is still operating and has made a name for itself in its field (Lee & Lee-Chua 1997).

Outstanding and long-lasting family businesses should put their learning into practice to serve as an inspiration to others. The approach suggests that the selection, adoption, and replication of practices of successful family businesses contribute to the longevity of family enterprises. The primary objective of this

best practices' approach in the family business is to help families achieve success and, more importantly, growth, continuity, and effective succession (Dana & Smyrniotis, 2010).

Successful Higher Education Institution

A successful private non-sectarian, family-owned higher educational institution – based on research – is a school that is more than fifty (50) years in existence (Miller & Le Breton-Miller, 2005) and had at least two-generational transitions (Georgiou & Vrontis, 2013). Also, it has increasing enrolment (Ballard, 2013), level III accreditation status (Gulla & Jorgenson, 2014), good performance in the Board examinations (Commission on Higher Education, 2014), and the high employability of graduates (Labanauskis & Paliulis, 2015).

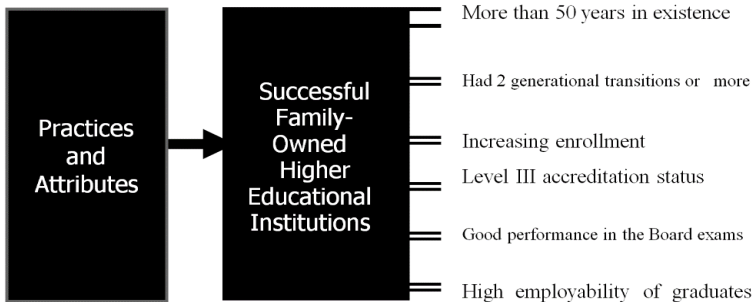


Figure 1. Attributes of a successful HEI

Accreditation is a quality-management mechanism given parallel to the minimum requirements of quality assurance that are given as requirements for institutions and programs and mandated by the Commission on Higher Education (CHED), a national organization of the Philippine government responsible for the monitoring of higher educational institutions (Arcelo, 2003). Private voluntary accreditation provides an educational institution the opportunity to attain standards above the minimum requirements prescribed by the government. It honors universities and colleges as it authenticates their accomplishments in providing quality education (Mekic & Goksu, 2014).

Despite the existing family business models and the identified factors influencing the performance and the continuity of family firms, there is a notable lack of research in terms of an effectively managed private, non-sectarian,

family-owned colleges and universities considering the significant role that these institutions play in the development of society.

At present, there are 2,299 higher educational institutions (HEIs) in the Philippines. Six hundred fifty-six (656) or 28.53% of the total HEIs nationwide are public HEIs. Private colleges and universities account for 71.47% of the higher education system, with a total number of 1,643 institutions. In the context of family-owned HEIs in the Philippines, they constitute approximately 65% of all private education (Commission on Higher Education, 2014). Regardless of the extensive research effort, most studies on family business focused on business and corporate organizations. There are fewer studies done on family-owned colleges and universities with a long-term perspective of development.

OBJECTIVES OF THE STUDY

In this context, this study took a more analytical and definitive look at the attributes and practices of private non-sectarian, family-owned higher educational institutions within the country, which contributed to their success and sustainability. With the main objective of establishing a framework for future empirical research, a model – which integrates the attributes and practices into a logical whole considering the significance of the institution of learning in the lives of most Filipinos, their communities and to the country – was also developed based on the results of this study.

METHODOLOGY

Research Design

This study is qualitative, exploratory research on the attributes and practices within a successful family-owned HEIs to develop a theoretical model for understanding the dynamics behind its sustainability. Qualitative research is one in which the inquiry results to knowledge claims based primarily on constructivist perspectives, i.e., the multiple meanings of individual experiences are constructed with the intent of developing a theory. One strategy of inquiry is the case study. It is an inductive process of building from the data to broad themes to a generalized theory (Creswell & Creswell, 2017).

Further, given the investigative process's intent, the researcher adopted a case study as the primary inquiry method to illuminate a decision or set of decisions as to why they were taken, how they were implemented, and with what result.

The use of a case study is justifiable in trying to answer the research questions of how and why. The researcher's purpose would be to generalize theories rather than enumerate frequencies (Yin, 1989).

Research Site

The case under study is an autonomous family-owned university in Metro Manila that is being managed by the third generation. It has been in existence for sixty-eight years and continues to contribute to the country's socio-economic development.

Research Respondents

The respondents of this research are the leaders who belong to the top and middle management. The top management is composed of the members of the Board of Directors who are also officers of the Administration. The middle management is made up of the deans and department heads of the university. The case under study is an autonomous family-owned university in Metro Manila that is being managed by the third generation. It has been in existence for sixty-eight years and continues to contribute to the socio-economic development of the country.

Instrumentation

This study primarily utilized self-made open-ended questions that focused on the attributes and practices of a successful family owned-higher education institution. The researcher allowed the respondents to freely share their own experiences and insights relevant to the questions.

Data Analysis

The robustness of data analysis is anchored on the thematic analysis (TA). As Braun et al. (2013) discussed, TA is a method for systematically identifying, organizing, and offering insight into patterns of meaning (themes) across a data set. The emphasis is on the identification of shared or collective meanings and experiences in the way the topic is talked or written about by the respondents. Finally, triangulation was observed using various forms of data that would support the study, such as documents, statements gathered during the interview, and observation.

Ethical Consideration

The researcher ensured the voluntary participation of the respondents. Further, confidentiality and anonymity were also observed in this study.

RESULTS AND DISCUSSION

To advance the understanding of the factors that influence the success and sustainability of family-owned higher education institutions in the Philippines, specific attributes and practices of a successful higher education institution were explored in this study. The criteria for successful businesses are primarily focused on profitability and performance (Breton-Miller & Miller, 2013) and good governance (Neubauer & Lank, 2016; Chrisman, Chua, & Steier, 2005). It also includes the professionalization of the organization (Hellmann & Puri, 2002) and longevity (Bennedsen et al., 2015; Georgiou & Vrontis, 2013; Miller & Breton-Miller, 2005; Williams & Jones, 2010). Another clear indicator of success is the smooth transition from one generation to the next (Bennedsen et al., 2015) and the maintained good performance over the years (Naldi et al., 2015).

Corporate Culture and Values

For this particular case study, the data obtained strengthened the expectation that socio-cultural factors impact higher education institutions' in the Philippines. Sociological Factors which oftentimes include 'belief and value systems, attitudes, acculturation levels, socialization goals and practices, communication styles, interpersonal relations, and experiences, and problem-solving and stress coping strategies are significant indicators in determining the success and sustainability of a family-owned higher education institution as observed in this particular case. The dominant theme identified, the 'Corporate Culture and Values,' belongs to the belief and value system of sociological factors.

This study's results support the findings of the case conducted in one of the universities in Indonesia. The study revealed that culture and social relations are pivotal in the management of the University (Tsamenyi, Noormansyah, & Uddin, 2008). Social and cultural factors impact important management decisions. This study proves the strong influence of culture and social relations in managing a family owned-higher education institution, specifically in a developing country.

The significant influence of values and beliefs of the founders and owners to the success of the institution, as supported by the study of Pedersen-Rise & Haddud (2016) were also revealed in the statement of the respondent.

The owners' influence is evident in their commitment to the school and the way they treat their employees, specifically the top leaders. For instance, members of the Council of Deans shared their involvement in planning and their positive experience in working with the owners. Other respondents who have a leadership position in the institution emphasize the inspiration they are getting from the family members who manage the people in the organization and how the owners emphasized familiness in the institution.

The same relationships were found out by Craig, Dibrell, and Garrett (2014), who understood the 'role of familial relationships' in identified family institutions. Though previous studies emphasized the culture of family firms (Denison et al., 2004), many empirical studies have not comprehensively emphasized the underlying constructs of corporate culture and values, which became the focus of this research.

The significant contribution of corporate culture and values to the success of a family-owned higher education institution is established in this study, as reflected in the presented statements of the leaders/respondents from the institution. As Wale-Oshinowo (2017) concluded in his study.

Family culture is an important, valuable resource that shares a similar influence on a family firm like the already established components of family involvement in the family business literature, namely: ownership, management, succession, and governance. Thus, the corporate culture and values nurtured and experienced by the respondents in the first case reflect the family values shared by the owners of the higher education institution to their employees in the organization.

The result of this current study somewhat diverges with Fernández-Aráoz et al. (2015) research, which identified good governance as the baseline of most successful family firms. Through interviews with both family and non – family executives, the establishment of good governance preserve 'family gravity,' or it is the factor that makes them special and brings discipline to top-level succession.

Leadership Style

The second prevailing theme that emerged from among the validated statements is the Leadership Style. A significant number of studies mostly focus on leadership styles as an important indicator in the success of any firm, not only family-owned institutions. Emphasis on the relationship of leadership styles to the workplace resilience of employees (Nguyen et al., 2016); employee's productivity (Rehman et al., 2018); team effectiveness, and organizational

performance (Burke et al., 2006; Carson, Tesluk & Marrone, 2007). As observed by the employees in a family-owned higher education institution, an evident leadership style is transformational leadership.

The statement determines the perceived team effectiveness as observed in the relational leadership practiced by the top management, which is also an indicator of a transformative leadership style (Braun et al., 2013; Choi, Kim & Kang 2017; To et al., 2015). A transformational leader takes care of his people and focuses on a better output to achieve the organization (To et al., 2015), as observed by the respondents.

Another practice reported by middle managers in the institution is the delegation of tasks. As indicated in the quantitative study of Uzonwanne (2015), there is a significant relationship between the leadership styles (selling, telling, delegating, and participating) and decision-making models (rational, intuitive, dependent, spontaneous, and avoidant) of executives in non-profit organizations.' Proper delegation is also highly observed by middle management in a higher education institution.

Leading by example, is also a culture in the organization. As indicated in previous studies (Güth et al., 2007; Potters, Sefton & Vesterlund, 2007; Wolbrecht & Campbell, 2007; Yaffe & Kark, 2011), leading by example is contributory to the improved performance and involvement of the employees in achieving the goals of the organization.

Corporate Governance

Another theme that emerged from the analysis that is found among the statements is Corporate Governance. The practice of sound corporate governance in a family-owned businesses needs attention if firms want to meet the competitive demands of changing economy for financial sustainability (Abor & Biekpe, 2007; Aguilera & Crespi-Cladera, 2012; Brenes, Madrigal, & Requena 2011; Carney, 2005; Gulzar & Wang, 2010). Denis and McConnell (2003) define corporate governance as the 'set of mechanisms, for both institutional and market-based, that influence the self-interested controllers of a firm (those that make decisions regarding how the firm will be operated) to make decisions that maximize the value of the firm for its owners (the suppliers of capital).' In its simpler term, as described by Shleifer and Vishny (1997), "Corporate governance deals with the ways in which suppliers of finance to corporations assure themselves of getting a return on their investment." Further, the Finance Committee on CG in Malaysia in the Report on GC (2002) defines CG as: "The process and structure used to

direct and manage the business and affairs of the company towards enhancing business prosperity and corporate accountability with the ultimate objective of realizing long term shareholders value, whilst taking into account the interests of other stakeholders' (HLFC, 2000).

Ultimately, effective corporate governance in a family-owned business also sustains the relationship with the stakeholders and the institution's financial stability (Ibrahim & Samad, 2011; Klein, Shapiro, & Young, 2005; Mansor et al., 2013). As reflected in this study, the middle managers practice the institution's psychological ownership because of sound governance by the business owners.

Sound Strategy

The next theme that dominated in the analysis is Sound Strategy. Long term planning is necessary for business success. As Carlock and Ward (2010) disclosed, the best family businesses align their vision, values, planning, investment, and governance processes to family and business activities. Further, Alwafi (2013), Carlock and Ward (2010), centered their research on two vital factors in the success of family-owned firms – estate planning and succession. The observation of middle managers supported the previous studies:

The statements supported the study of Charbel, Elie and Georges (2013), which revealed that family involvement in the ownership and management of a business has a significant impact on the company's financial performance.

Succession Planning

Another prevailing theme that was determined as a factor in the success of the institution is Succession Planning. The respondents were confident in sharing the succession planning practices of the family-owned institution.

As proposed by Puspani and Suyono (2019), several success factors of leadership succession in the family-owned Higher Education Institution include knowledge transfer, adaptability of the leader to the present situation, and opportunity for the successor to express their vision. The middle-level manager of the university likewise observed the indicators.

Explanatory research by Bozer, Levin and Santora (2017) investigated the key personal and professional factors associated with effective family-business succession across four key stakeholders: incumbent, successor, family, and nonfamily members. The study revealed that maintaining a cohesive family business, adaptable family culture, and families are significant indicators for effective succession. In addition, as observed by the respondents' certain

characteristics of the leadership role in the family-owned organization (Zahra & Sharma 2004) is also significant in succession planning.

Further, maintaining the knowledge at the strategic and operational levels that have been passed on from the previous leader is one of the main issues that typically occurred in family-owned organizations (Klenke, 2018).

However, the relationship of the organization's past and present perspective of the successor to the organization's past condition as compared to the present situation can be a source of problematic leadership succession issues in family-owned organizations (Breton-Miller, Miller, & Steier, 2003). One way to combat this is the implementation of appropriate knowledge transfer activities, which can help the HEIs to have a successful leadership succession (Klenke 2018; Lefebvre & Lefebvre, 2016) and the adaptability of the leaders can give positive contributions to the success of the leadership succession in family-owned organizations. One good indicators that the first case is prepared for this factor are their training and mentoring practices. Lastly, they also avoid conflict by allowing sensitive positions to be handled by family members and by not hiring in-laws.

Human Resource Management

Another theme disclosed in this study is Human Resource Management. The impact of Human Resource Management and Development Practices was also emphasized in a study wherein Ulferts, Wirtz, and Peterson (2009) disclosed a competitive strategic model in a maritime education setting. Using a qualitative naturalistic design employing phenomenology and ethnography, the research confirms the significant role human resources plays in motivating the employees, specifically the instructors in this case. This study follows the observation of the respondents particularly focusing on the benefits program of the institution

In another study conducted by Bannò and Sgobbi (2016) on the relationship between human resource management and family business overseas in relation to internationalization, two of the major findings of their empirical analysis emphasized the participation of family members in the board of directors and the involvement of young successors. For this instance, the institution covers the international mobility of its faculty, specifically their employees who holds leadership positions.

More importantly, family firms display a stronger focus on informal HRM tools, often based on trust and personal relationships among family members and employees (Basco & Perez Rodriguez, 2009), characterized by tenure-

based promotions, low autonomy of personnel in decision-making, and focus on activities enhancing family–business links (Basco & Perez Rodriguez, 2011). Besides, wage inequality among the members of the top managerial team is lower in Family-Based Firms compared with non-Family Based Companies (Ensley, Pearson & Sardeshmukh, 2007) and the owner family’s attempt to keep control and influence over the business (Le Breton-Miller & Miller 2009); plus the socio-emotional commitment that drives family members to extend their concern to all stakeholders involved in the business (Zahra, 2003) were also important in human resource management. In this case, motivation and rewards are factors for the institution’s successful management of human resources.

Family Culture

Another important factor discovered in this study is family culture. Family involvement in management and ownership has been studied to identify the impact of family culture in different firms. Results showed the negative effects of family governed institutions due to lack of financial stewardship (Sciascia & Mazzola, 2008). However, the opposite was the result of this study, as observed by the respondents.

Another study that supports family firm culture is the study of Gibb Dyer (2006), which emphasized the importance of the involvement of different family members in the management of the organization. In this case, this is evident in the caring relationship of each member not only to one another but to their employees, as well. The result of this study also converges with the findings of Koh, Kong, & Timperio (2019) which emphasized the significant contribution of family culture in innovative practices of family owned firms.

Shared Vision

Shared Vision is one of the ten themes also discovered in this case study. The importance of family working together to achieve a common goal for their firms/business ventures starts with the founder’s vision (Carlock & Ward, 2010) and the central influence of the founder in the strategic management of the organization should always be considered in identifying the strength of a successful institution (Kelly, Athanassiou & Crittenden, 2000). In this case, they allowed the family values to be the overarching foundation of their identity as an institution.

Further, they allowed the institution members to focus on the bigger picture beyond their professional functions. This supports the study conducted by Neff (2015), which reveals that Shared Vision exhibited the strongest positive influence

among the significant factors of a successful family-owned firms/institutions. Having a clearer picture is also the focus of the institution in this study.

Corporate Social Responsibility

The final theme discovered is Corporate Social Responsibility, which as reflected in the statements of the respondents, focuses on Caring attitude and the Filipino value of deep concern (*pagmamalasakit*).

The results support the study of Amiri, Ranjbar & Amiri (2015); Stanislavská et al. (2014); and Gupte & Jadhav (2014), which focuses on the culture of Corporate Social Responsibility in Higher Education Institutions. The focus is on extending different interventions for the less fortunate communities focusing on the awareness not only of the students but also of the institution's faculty members. This perception of corporate social responsibility is also reflected in Ahmad and Islam (2018) study in Pakistan emphasizing the different perceptions and applications of CSR not only as an extension activity outside the Higher Education Institution but as a common practice inside the system through curricular programs and commitment of the faculty and management to the students and all other employees and stakeholders.

CONCLUSIONS

Findings from this study reveal several themes that result in attributes and practices contributory to the success of family-owned higher educational institutions. These are the presence of a shared vision, corporate social responsibility, positive corporate culture and values, effective corporate governance, a strong human resource development program, a transformative style of leadership, strong family culture, a succession plan, and effective business strategies. Significantly, the dominant theme was anchored on corporate culture and values, which reflects the family orientation not only of the leaders in the institution but also the general culture of the Filipino people. It is concluded that these various themes form part of the holistic model that can appropriately analyze family firm performance in the field of education in terms of sustainability through several generations.

Apart from the constructs identified, the dominant characteristic that made this case successful is the family's influence that contributes to making a family business different from a business with no family ownership or involvement (Astrachan et al., 2010; Kellermanns et al., 2012). Family business culture,

therefore, is an important family business endowment that defines how family and business systems share assumptions and values, manage people, organize processes, lead and strategize different social phenomena (Fletcher, Melin & Gimeno, 2012; Habbershon et al., 2003).

TRANSLATIONAL RESEARCH

The findings of this study could be translated into a framework that can be used as a guide for the internal assessment of other family-owned higher institutions of learning. The framework could be the focus of a manual or handbook and be distributed to stakeholders for validation.

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