

The Austin Family Business Program

celebrating

30

years of family business education

Presenting the

2015

**Excellence**

in Family Business

**Awards**

**Oregon State**  
UNIVERSITY

# The Austin Family Business Program Celebrating 30 Years of Family Business Education

The proclamation of Family Business Day in Oregon marks another year of progress for the families and executives of some of Oregon's most enduring companies. Ownership and business operations responsibilities, whether a family business is large or small, privately held or publicly traded, have grown increasingly complex. The Austin Family Business Program is leading the family business community by creating opportunities for families to gain deeper understanding of the challenges they face and to prepare new generations of leaders. Enhancing awareness of the research and insights of professionals in law, accounting, mediation, finance, banking and coaching helps secure the future success of Oregon's family businesses and the state's economy.

## FROM THE DIRECTOR

I remember my first Saturday in Oregon after arriving in 2007. I was standing in line at Mo's Chowder in Newport. There was a huge weekend lunch crowd waiting in the small lobby. As someone passed by, my shoulder brushed against a framed award on the wall. As I turned to straighten the plaque I saw that it was the Excellence in Family Business Award received over 10 years prior. It was my first sign that this outreach program I was joining at Oregon State University instilled a deep source of family pride.

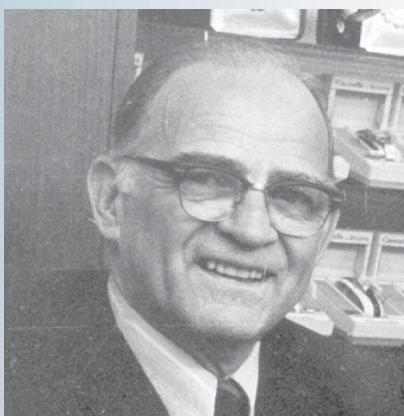
The annual recognition of outstanding family businesses began soon after the Austin Family Business Program was started. It's grown from a small recognition luncheon on the OSU campus into a full-scale process of application, review and selection that culminates with an evening awards program in downtown Portland. At the same time, the meaning and impact of the award have deepened. A simple community service recognition has become an educational experience for families to affirm their strengths and discover new opportunities for advancing the family enterprise. What hasn't changed is the sharing of a wonderful meal together, the excitement of telling the founder's story, and, of course, the awarding of "the big plaque."

Each generation plans its journey in developing strengths for business renewal, generational leadership development and family harmony. Whether a family completes the Excellence Award application to work on the family business or applies to honor parents and grandparents, compelling stories are captured here to inspire other families.

We will continue to celebrate and build trust between generations to secure the family's enterprise and legacy.

We hope that you'll join us.

Sherri Noxel, Ph.D.  
Director, Austin Family Business Program  
A.E. Coleman Chair in Family Business  
L.W. "Bill" Lane Professor in Family Business  
Management



### Photos above:

*Dr. Pat Frishkoff, founding director, opens the first family business conference in Oregon, 1986.*

*Ken and Joan Austin provide a donation to endow the family business education program that is named in their honor, 1994.*

*Corvallis businessman Alfred E. Coleman has a faculty endowed chair established in his honor by his sons, Richard, John and Jim, 1999.*



## AFBP ADVISORY COUNCIL

**Clint Bentz**, Boldt Carlisle + Smith  
**Becky Berger**, Berger Seed  
**Jim Fowler**, James W. Fowler Co.  
**Pat Hraba**, Waterford Hotels & Inns, Inc.  
**Steve Lytle**, Clearpath Family Advisors  
**Ken Madden**, Madden Industrial Craftsmen  
**Mitzi Montoya, Ph.D.**, Oregon State College of Business  
**Karolyn Neupert Gordon**, Consolidated Supply Co.  
**Christian Schiller**, Cascadia Capital LLC  
**Rich Simmonds**, Simmonds Associates LLC  
**Susan Sokol Blosser**, Sokol Blosser Winery  
**Chris Thompson**, TEC Equipment  
**Greg Waggoner**, Leupold & Stevens Inc.  
**Jerry Weed**, (retired) Pacific Lumber & Shipping  
**June Wyrick Flores**, Miller Nash LLP

## THE AUSTIN FAMILY BUSINESS PROGRAM

Sherri Noxel, Ph.D., Director  
Roger Anderson, Program Manager  
Melissa Elmore, Office Manager  
382 Austin Hall, Corvallis, Oregon 97331, Phone: 800-859-7609  
[business.oregonstate.edu/familybusinessonline](http://business.oregonstate.edu/familybusinessonline)

# 2015 Excellence in Family Business Awards

Thursday, November 19, 2015 | Sentinel Hotel, 614 S.W. 11th Avenue, Portland

**Reserve your seats now at [business.oregonstate.edu/familybusinessonline](http://business.oregonstate.edu/familybusinessonline)**

## CONTENTS

About the 2015 Excellence Awards .....	3
Business Renewal Winner: Rose City Label Company .....	4
Q&A with Nik Blosser, Emcee of the Event .....	5
Family Harmony Winner: Roe Motors .....	6
Generational Development Winner: David H. Sutherland & Co., Inc. ....	8
Excellence that Endures .....	9
Student Award Winner: Mackenzie Day .....	10
Business Renewal Finalist: Hillsboro Implants & Periodontics.....	11
Family Harmony Finalist: Lee Farms .....	12
Family Harmony Finalist: Nicholas Restaurant .....	13
Generational Development Finalist: Newberg Steel & Fabrication, Inc. ....	14
Generational Development Finalist: Hagan Hamilton Insurance .....	15
Excellence in Family Business Award Recipients .....	16

## ABOUT THE AWARDS

The Excellence in Family Business Awards Program, presented yearly by Oregon State University's Austin Family Business Program, was founded in 1988 to applaud the accomplishments and contributions of family businesses for their innovation, entrepreneurship, commitment and heart.

Any family business is eligible regardless of size or longevity. A family business is broadly defined as having multiple family members or generations involved in the management or strategic direction, or working in the company with the intent of helping the business remain in the family.

One category winner and one runner-up were selected for the following awards:

1. Business Renewal: Ensuring the family business will be vital for generations to come.

2. Generational Development: Building connection to the young adults and children in the family and preparing them for future leadership roles in the family and possibly in the business.

3. Family Harmony: Developing and sharing a common vision, building trust and creating personal relationships among all family members, even those who do not work in the business.

Applications were rated by a panel of judges as well as an automated scoring process. The three highest-scoring applicants in each category were required to make a 20-minute presentation to the judges. The selection of the winner in each category is made after the presentations. All family business entrants received scoring feedback on their applications.



**2015 Excellence in Family Business Awards Judges**

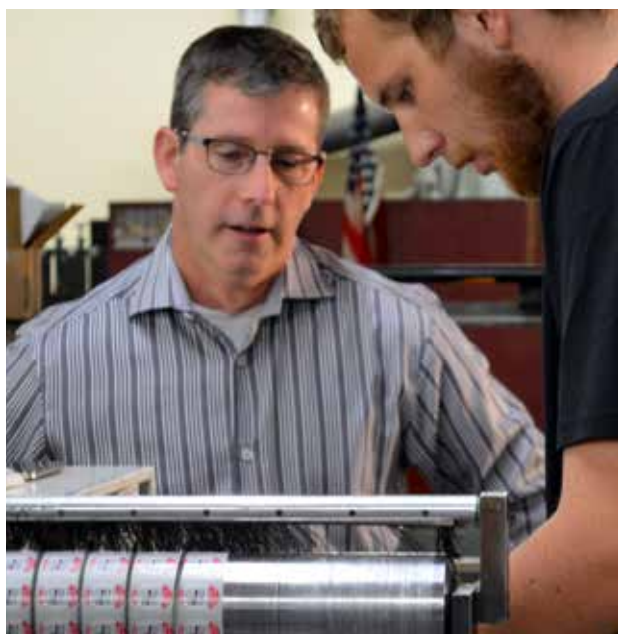
**Left to right: Judith McGee, McGee Wealth Management; Daryl Knox, AKT LLP; Nancy Kneisel, Second Glance, Inc.; Andrew Martin, Willamette Valley Pie Company; Laura Unger Bell, Unger Farms, Inc.; Violetta Gerasymenko, OSU College of Business. Not Shown: Becky Berger, Berger Seed**

2015 Business Renewal Winner

# Rose City Label Company



Scott and Whitney Pillsbury had already worn the label of business owner for a decade—of, appropriately enough, a label printing company—when a cratering economy forced the brother and sister to raise their management game in a hurry.



“We really were just kind of minding the ship we’d been given,” said Scott, who along with Whitney had taken over Rose City Label upon the sudden death of their father, Mike, in 1998. “Then in 2008, the phone stopped ringing. A lot of our customers went out of business. We had to tighten our belt and really look at expenses like we never had before. We said we’re going to take this business and make it better, invest in it.”

Adhering to the plan as solidly as its labels stick to a bottle of microbrew – the company is a major player in the craft beer sector, and also makes labels for any type of product that comes in a bottle, box or bag – Rose City made a series of capital investments. New machinery has expanded production capacity, improved efficiency and demonstrated both to customers and staff that the company is committed

to competing for years to come.

First, Rose City bought a small-format digital printer. Then the company upgraded its traditional, long-run press operation with a high-definition, direct-to-plate system that converts designs on a computer screen into the plates that go on the press.

Next came digital die-cutting, and then in 2014, what Scott calls the company’s “capstone” purchase: a longer-run digital press.

“Each one built on the other,” said Scott, the company president. “Each investment we made that turned out to be successful gave us more confidence to do more.”

“Digital printing had always been a dream of ours,” said Whitney, whose title is vice-president. “It’s really exciting to be able to achieve that.”

Whitney and Scott describe themselves as the “fourth generation, second family” in

**LOCATION: PORTLAND | FOUNDED: 1928 (PURCHASED BY PILLSBURY FAMILY IN 1974) | GENERATIONS IN THE BUSINESS: ONE**

Rose City Label history. George Frie founded the business in 1928, and 30 years later his son Wayne took over. Mike Pillsbury, who'd been a paper salesman for Crown Zellerbach, bought the company in 1974.

"He was a very strong, clear-minded, nice person," Whitney said. "He believed in hard work, honesty and treating people the way he wanted to be treated," Whitney said.

"He didn't complicate things," Scott added. "He used to say, 'The two most important things we do here are sell labels and make labels; anything that distracts you from that is superfluous.'"

Whitney and Scott, who were 29 and 31, respectively, when their father died, both had worked at Rose City while in high school, then "went to college, went away and did other things," Scott said, before returning to the family business – Whitney coming back in 1993, Scott a year later.

"We're going to die here," Whitney said with a laugh. "I hope we do have our children and grandchildren take over."

Scott has four children ranging from 18 to 12, and Whitney has a 31-year-old daughter and 8-year-old granddaughter.

"Renewing the business has been really important to us," Scott said. "Hard work and good luck enabled it all to keep moving forward, and it's fantastic to see where we are now."

With an emphasis on innovation and green business practices, Rose City has the buy-in of a loyal staff of 18 whose average tenure is 13 years, including a core who stayed on at 30 hours a week during the leanest of times.

"We are so lucky we have the employees we have," Whitney said.

Scott and Whitney handle decision making jointly, and they're also in agreement about what they learned during the downturn, and that the Business Renewal award traces directly back to their father.

"I really appreciate being acknowledged – it's for Rose City Label and also for him and what he left us," Whitney said. "We treat our employees like a family, and we're brother and sister first and business partners second."

"It's nice recognition and confirmation that what we are doing is working," Scott said. "We've learned not to take the future for granted. We're going to celebrate when we're doing well, recognize what we're doing right, and be happy and proud."



## Q&A with the Emcee of the 2015 Excellence in Family Business Awards

### Nik Blosser

Chairman, Sokol Blosser Winery, 2nd generation family member, and CEO, the Celilo Media Group

#### WHAT IS YOUR EARLIEST MEMORY OF YOUR FAMILY'S BUSINESS?

Playing in the dirt.

#### WHAT IS THE BEST ADVICE YOU'VE GIVEN YOUR CHILDREN?

Learn to play an instrument, try different kinds of foods, wash your hands, and do what Mom says.

#### WHAT'S THE BEST BUSINESS DECISION MADE WHILE YOU'VE BEEN THE CHAIRMAN OF SOKOL BLOSSER WINERY BOARD OF DIRECTORS?

Supporting and encouraging my brother and sister to make big decisions. Specifically, supporting my sister in going out on a limb to build our new tasting room, and supporting my brother in completely changing his career to become the winemaker.

#### WHAT ARE YOU MOST LOOKING FORWARD TO AS THE MASTER OF CEREMONIES OF THE 2015 FAMILY BUSINESS AWARDS?

I love hearing the personal stories of other family businesspeople.

#### WHAT DO OREGON'S BUSINESS EXECUTIVES NEED TO KNOW ABOUT FAMILY COMPANIES?

Multigenerational companies care about the long term, and that includes the health of the environment. Over the next couple decades I'm convinced that climate change will dramatically affect family businesses, particularly those that rely on a consistent climate, like farmers. We've already seen it over the last several decades in the wine industry; we're harvesting grapes a month earlier than when I was growing up.

#### WHAT SURPRISED YOU MOST ABOUT STARTING YOUR OWN COMPANY?

I think just the constant background stress in your life that you have to learn how to forget about. The work is never done, so finding ways to escape is really important.

#### BUSINESS BOOK THAT YOU RECOMMEND MOST OFTEN?

I do like "Good to Great" by Jim Collins. But right now to anyone in the tech industry I'd recommend the TV series "Silicon Valley." It's hysterical, which is good because laughing helps you forget the failure you feel for not having taken your company to IPO.

#### LAST FAMILY VACATION DESTINATION?

We had our first big family vacation ever this year to Iceland, Northern Ireland and Scotland and it was fantastic.

#### EARLY BIRD OR NIGHT OWL?

Both, unfortunately.

2015 Family Harmony Winner

## Roe Motors

**While he was growing up as the youngest of five children on a South Dakota farm, 87-year-old Ross Roe heard a Norwegian neighbor offer an explanation that would become the Roe family motto: "The barn will build the house, but the house will never build the barn."**

The neighbor was responding to a question regarding why his out-building was so large and top-notch, while his home was, well, not. His reasoning was that his time, energy and money should first be devoted toward the structure that was his family farm's economic driver, rather than the building that housed the family.

That's the model Ross Roe used as he worked his way from General Motors employee in Moline, Ill., to dealership owner in Sault Ste. Marie, Mich., and, for the last 32 years, Grants Pass.

Leaning on wife Annette to run the household and raise four children who'd follow him into the car business, Ross set a hard-working tone of compassionate excellence that's carried Roe Motors to this year's Family Harmony award.

"We have a responsibility to live up to what this award means to us," Ross said.

Ross remains Roe's dealer principal though he's largely retired, while son Steve serves as general manager and daughter Lori Bouquet is sales manager (the other two Roe sons work in the industry in Portland and Michigan, but no longer for the family dealership).

General Motors has already approved Steve as the next dealer principal, at which point Lori will become general manager and next in line for the dealer principal role.

"They really want to run the dealership, and they run it better than it was run before, by me," Ross said.

"Isn't that a good goal for a family business?"

The Roes came to Oregon all those decades ago primarily because everyone was tired of dealing with the Upper Peninsula's arctic climate. At one of their Sunday family "board meetings," the topic of moving came up and was ratified.

It took two years to sell the Sault Ste. Marie dealership. Steve and Ross toured the country, mainly the West, looking for new opportunities, and they found a home in the Rogue Valley.

"The first month we were here, it rained 10 inches," Annette recalled. "We were wondering if we'd made the right choice."

But once that soggy March was behind them, the family set about doing what they do best: Empowering employees, taking care of customers and entrenching themselves in the community via various forms of service and outreach.



**LOCATION: GRANTS PASS | FOUNDED: 1983 | GENERATIONS IN THE BUSINESS: TWO**

## College of Business Welcomes New Dean

Mitzi M. Montoya became the Sara Hart Kimball Dean of the College of Business at Oregon State University in August 2015. She is responsible for providing leadership of the college, which is focused on innovation and entrepreneurship and serves more than 5,800 students, including 3,900 business majors and pre-majors, nearly 850 business and entrepreneurship minors, 250 graduate students and more than 800 design students.

Throughout her career, her research has focused on innovation processes and strategies and the role of technology as an enabler of distributed team decision-making.

With a focus on the dynamics and performance of globally distributed work teams, her research has appeared in *Management Science*, the *Journal of Marketing Research*, *Marketing Science*, the *Academy of Management Journal*, the *Journal of the Academy of Marketing Science*, *Decision Sciences*, *MIS Quarterly* and the *Journal of Product Innovation Management*. Dr. Montoya serves on the board of several startup ventures and has advised many organizations on topics related to innovation and marketing strategy.



Left to right: Lori Bouquet, Annette and Ross Roe, Steve and Kristi Roe



“I still have a land line, and my number is in the phone book,” Ross said. “Last year we never received one call about the business to our home phone. Usually everything gets taken care of at the department level, but if a concern comes to Steve or Lori, they’ll always say, ‘What would it take to make you happy?’ Usually it’s not much. They just want to be recognized as individuals.”

The family’s individuality comes through too, as Ross, Lori and Steve

all bring their own strengths and interests to the operation.

“We all don’t necessarily like to do the same things within the dealership,” said Steve, who has an accounting background. “We focus on what we’re good at and it makes for a stronger team.”

Ross’ calling card is as a communicator with an inquisitive mind and the goal of learning something new each day.

“He has the most incredible

enthusiasm for life,” Lori said. “Every day is an adventure for him. And my mom is just the rock, the glue that holds us together.”

“Harmony in our family is much larger than the Roe family, it’s the whole organization,” she added.

“The key to family harmony is respect; if you don’t have respect it all falls apart.”

Steve’s wife, Kristi, a third-grade teacher, calls “caring” the defining trait of the family she married into.

“For customers, for the community, for other family members,” she said. “They want to help people.”

“Being able to work in a family business is a gift,” Steve added. “We learned hard work and learned the value of that. We didn’t win this award in one day, and now we have the obligation to keep it going. We started out with basically nothing as a family and my dad grew the business into what it is today.”

## Students in Family Business

More than 25 percent of the undergraduate students attending Oregon State University report that one or both of their parents work in a business that is owned by members of the family. To serve these students the Austin Family Business Program offers both an in-person and online family business management classes.

Each April students from all Oregon universities and community colleges are invited, along with their faculty, to a luncheon in Portland featuring a

prominent family business executive. Past participating executives include Dominic Biggi, Beaverton Foods; Jim Fisher, Fisher Volvo; David Chown, Chown Hardware ;and Sean McMenamain, McMenamains.

Nearly \$20,000 in scholarships is awarded annually to College of Business students from family businesses. These generous donors provide important assistance to the next generation of Oregon’s family business leaders.



2015 Family business scholarship recipients in Austin Hall

2015 Generational Development Winner

# David H. Sutherland & Co., Inc.



With an Ivy League graduate degree in psychiatric social work, David Sutherland seemed well suited for a post-World War II career with the Department of Veterans Affairs. But the job made the former Air Force bomber pilot feel confined.

“He wanted to be a commercial pilot, but there was a glut of pilots after the war,” said his daughter, Mary Sutherland Crouse. “But the world was bigger for him than an office in the Veterans Administration.”

Mary is now the CEO of the international trade company, David H. Sutherland & Co., Inc., that resulted from her father’s global perspective. But prior to David Sutherland making the world his workplace, things had to get smaller before they could get bigger.

How small? Try a phone booth.

With the sharp eyes and agile mind befitting a flyer of 13 B-29 missions over Tokyo, Sutherland took note of a pile of surplus coking coal briquettes outside the Portland Gas & Coke Building off Highway 30.

He knew the briquettes were just the sort of material war-ravaged,



rebuilding nations like Japan needed, so he started working his connections to see if he could find buyers for them in Asia.

That’s where the phone booth came in. On his lunch hour, Sutherland would drive to the Multnomah Hotel and use the phone in the lobby to try to make deals.

He succeeded, and thus was born the company that today occupies

20,000 square feet in Beaverton, employs 28 people and is a global supplier of composite and specialty products for aerospace and other high-performance industries.

Crouse was 35 when her father died three decades ago, part of the company’s board but not involved in day-to-day operations. Her mother, Beth, had been trying to transition herself out of the business. David

**LOCATION: BEAVERTON | FOUNDED: 1951 | GENERATIONS IN THE BUSINESS: TWO**



Sutherland declined quickly following a diagnosis of lung cancer, and before he died he had some pointed, though unfollowed, advice for his family.

“He told us to sell the company,” Crouse said, recalling how her dad had said, ‘You don’t know the business, you won’t be able to do anything with it, just sell it.’ My mother and I didn’t really know the business, but we held it together long enough, until my brother could take over.”

Jim Sutherland was just 21 at the time of his dad’s passing, and he took over the company four years later. Jim ran the business until dying suddenly in 2009, and Mary stepped back into the CEO role, where part of her work now involves preparing her son, Andrew, 37, to lead Sutherland.

“Our company faced two monumental tragedies with no planning, so the message I want for any family company is to get a plan in place and ask the hard questions,” said Mary, who in 2011 also lost her mother, a former flight attendant who’d fittingly met her future husband on a plane.

Andrew holds a business degree from Pacific Lutheran University and is in his second stint with his family’s business, having returned in February 2010 after working overseas in supply chain management for another company. He is Sutherland’s vice-president of Quality Management Systems.

“He had a comfortable job, with a young family, and took a big risk to come back,” said Mary, noting that in 2009 times were so tight she had to sign on as a personal guarantor for a \$1 million line of credit. “I just couldn’t be more proud of him. We’ve been here 64 years, and we want to have a legacy for 164 years, and more, if possible.”

To that end, Sutherland has a program through which family members can intern with the company after their junior year in college, and also a requirement that they work somewhere else for at least two years after college.

“It’s engaging and energizing to have a new generation, fresh eyes, new ways of doing things,” said Mary, who describes the Generational Development honor as a “tribute to my dad and mom.”

Andrew calls it “very humbling.”

“We entered strictly to learn how to get better as a company and how to get better as a family,” he said.

## Thank you to our Excellence in Family Business Award Celebration Sponsors:

Premier Sponsor



OREGONLIVE

The Oregonian

Reception Sponsor

KeyBank



Additional Support from

Allied Video

Union Bank

US Bank

Advanced Wealth Management

Farleigh Wada Witt

Heltzel Williams PC

Orca Capital Securities LLC

The Commerce Bank

The Rainier Group

# Excellence that Endures

## Valuable lessons learned from past Excellence in Family Business Award honorees

### 1985

*Joan Austin of A-dec suggests the founding of a Family Business Program at the College of Business, Oregon State University. Dr. Patricia “Pat” A. Frishkoff starts the program with the support of OSU President John Byrne and College of Business Dean M. Lynn Spruill and becomes its first director. The program is the second of its kind in the world (the first was at the Wharton School, University of Pennsylvania).*

### 1990 WINNER

#### Doug Feldkamp, Umpqua Dairy Products

“After 84 years in business the most valuable key to our success and growth is trust. Trust within our organization transfers to trust by our customers relying on consistent, quality products every time a purchase is made.”



L.W. “Bill” Lane, publisher of *Sunset* magazine, lectures to OSU students.

### 1993 & 2010 WINNER

#### Tom Kelly, Neil Kelly Company

“We need to be continuously learning and improving our methods and practices. Neil has been gone for nearly 20 years. He would absolutely recognize our core values and our goals. At the same time, many of the specific elements of our work today would be new to him.”

(Continued on page 10)

## 2015 Student Award Winner

# Mackenzie Day

Growing up as part of the fifth generation that owns and operates communications companies Reliance Connects and Day Wireless Systems, “it almost feels like the business is a family member,” Mackenzie Day says.



“The business is such a huge part of our family,” she says. “My cousins and I, we all started working when we were like 13 or 14. Every Christmas gathering or family gathering, there’s time set aside to talk about business.”

The companies trace their roots to a 1924 investment by the Day family of Estacada in a utility then known as Estacada Telephone and Telegraph.

Four generations later, that investment has bloomed and branched out to include 13 business in 30 locations throughout the West.

Mackenzie’s father, Gordon Day, and aunt, Brenda Day Crosby, manage the family’s two primary businesses, Reliance Connects and Day Wireless. Reliance Connects, based in Estacada and run by Brenda, deals in landline connections: cable television, Internet, telephones; meanwhile Day Wireless, headquartered in Milwaukie and managed by Gordon, focuses on two-way radio systems, microwave systems, anything having to do with wireless communication.

Mackenzie, 23, graduated from Oregon State in June with a management degree. After completing her family’s at-least-two-years-somewhere-else requirement, she’ll at some point rejoin Day Wireless to apprentice under 59-year-old Gordon.

“The plan is for me to learn, obviously, a lot more and interact with employees and potential customers,” she says. “I’ll work with him hand in hand and really learn the business, and eventually he’ll pass the baton; that’s what he sees happening, but it won’t happen anytime soon.”

Mackenzie broadened her horizons while studying at OSU and did

an internship with Toyota, but she’s never seriously considered anything but her family’s business as a long-term professional option.

“The opportunity has always been there,” she says. “The vision from our grandpa (Duane Day) was that there would be an opportunity for all of us, and I’ve wanted to work there for as long as I can remember. We do a lot of installs of radios for police and other emergency vehicles, and forestry centers and school buses. We provide a good, important service to important members of our community; it allows us to contribute and provide something that’s vital to keeping chaos at bay.

“And it’s an ever-changing business,” adds McKenzie, whose older sister, Jessica, works in accounting and whose older brother, Jacob, also plans to rejoin the family chain of companies. “The technology is fast growing and always changing, and we work hard and stay on top of the newest, latest, best things. It does not get boring.”

At Oregon State, Mackenzie “learned a lot about organizational behavior, work culture, basically how to create an environment to make happy employees and a happy business. Our biggest asset is our employees.

“So many of those management courses will help me in the future,” she says. “My human resources course gave me some vital knowledge of polices and things you have to know as a manager, how things are changing with different generations — my generation and what we expect out of the workplace. It’s something I can hopefully implement and make Day Wireless a great company to work for years to come.”

**Excellence**  
that Endures



### 1994 WINNER

#### David Chown, Chown Hardware

“Now embarking on our fourth generational transfer The most important lesson is, “father knows best”! Especially now that I am the father. It’s not entirely true; sometimes the young have great ideas. It’s important to be humble and willing to listen.”

### 1994 WINNER

#### Pete Gimre, Gimre’s Shoes

“Being able to attract and retain employees who share your family values, work ethic and love of the product you sell is paramount in the success of any business big or small.”

### 1994 WINNER

#### Greg Conser, Conser Realty

“My dad says, ‘Listen to each other.’ My mom says, ‘Be patient and understanding of each other.’ My brother Stuart says, ‘Don’t be afraid of change.’ My brother Matthew would say, ‘Opportunities are everywhere.’ I say, ‘Family is more important than business; and, there are no mistakes, only lessons.’”



2015 Business Renewal Finalist

# Hillsboro Implants & Periodontics

At Hillsboro Implants and Periodontics, Mel, Stacy and Michael Matsuda avoid the bite of an industry-wide challenge – staff turnover – with an empowering management style that makes every employee feel like he or she has a home within the practice.

“We’ve just had a real family feel to our practice, and that’s to Mel’s credit,” said Stacy, Mel’s wife of 37 years and one of the hygienists.

Mel, 64, and the couple’s son Michael, who’ll be 32 on Nov. 26, are the periodontists at the clinic, which was built in 1985 after seven years of practice.

“Mel believes in education and continuous improvement—then standing back and letting people do their job,” said Stacy, 60. “They take ownership and it gives them a sense of pride and commitment, having that longevity and history and strong experience. Michael has seen this formula throughout his life as the same core staff has been with the practice from the time he was a child. He has a strong desire to recreate that for himself, and he’s doing some amazing things in terms of leadership.”

An example: Michael instituted an internal acknowledgment/reward system that highlights team members going out of their way to assist others. Good things that get noticed get repeated. “When people are acknowledged, they feel cared for and respected,” Stacy said.

Service is the defining value of their lives, beginning with patients and the ethical, evidence-based care for which they have been recognized. “Mel has set a standard



of servant-leadership ethic in our practice that reaches beyond its walls to the dental community and the community at large, taking on key roles for the local dental society as well as state and regional associations,” Stacy said. “Michael has followed suit, volunteering for Medical Teams International and the Tooth Tax in addition to serving as a delegate to the Oregon Dental Association and the executive board of Western Society of Periodontology.”

Mel’s eagerness to serve, learn, grow and adapt is helping the practice transition over to the leadership of Michael, who in turn is respectful of what came before him. Again, an example: As Michael moved

the practice into computerized record keeping, he came up with a plan that allows the more paper-oriented Mel to write with a dry-erase pen on laminated charts that are then digitally scanned.

“Honor the tradition of what has created such a great workplace,” said Michael, who like his mother is an Oregon State alumnus, “and then move it forward by holding to those values but also embracing technology that can streamline processes and increase efficiency.”

**LOCATION: HILLSBORO**

**FOUNDED: 1979**

**GENERATIONS IN THE BUSINESS: TWP**

## 1996 WINNER

**Jeff Kelly, Kelly’s Home Center**

“Family succession in business is an opportunity, not a right. There is increased responsibility involving all family members and a need for a firm commitment to proactive communication.”

## 1996 WINNER

**Greg Waggoner, Leupold & Stevens, Inc.**

“Stay true to your core values and make sure your company core values are incorporated into your long-term strategic plan.”



## 1998 WINNER

**Ken Madden, Madden Industrial Craftsmen**

“It is never too early to introduce the next generation to the family business.”

## 1998 WINNER

**Dominic Biggi, Beaverton Foods, Inc.**

“Families have to create an orderly process for resolving different points of view. At some point one person needs to make the final decision and it should always be what is best for the business, not what’s best for one family member.”



## 2001 & 2010 WINNER

**Mike Henningsen, Jr., Henningsen Cold Storage Company**

“Navigating the treacherous waters of family business isn’t for the faint of heart. Understanding your family’s core values and business fundamentals and learning from the successes and failures of other family businesses smooths the waters downstream.”

(Continued on page 12)

2015 Family Harmony Finalist  
**Lee Farms**



*Three generations, from left to right: Tommy Lee, Noah Bartelamia, Kara Huffman, Luis Milera, Teagan Milera, Rory Milera, Nathan Wilcott, Craig Lee holding Ryder Huffman, Jeremy Huffman, Connor Wilcott, Dylan Wilcott, Aaron Wilcott, Erika Wilcott and Annie Lee-Bartelamia*

Annie and Craig’s ancestors settled in Tualatin in 1869, just a decade after Oregon became a state. Traditional agriculture alone sustained the family into its fifth generation.

“In the 1970s, my grandparents started raising strawberries and opened their fields up for u-pick,” Annie said. “We refer to that change as the beginning of the end of the cattle, and we have progressed to opening up our farm nearly year round for families to come and enjoy what we have to offer, something that is sustaining five separate branches of the family and several employees.”

Lee Farms includes a country store that offers fresh produce in season, jams, preserves and decorations for all seasons, and it hosts multiple festivals throughout the year. An all-purpose rural destination, Lee Farms also serves as the host for events ranging from school tours to weddings.

Annie’s grandfather, Larry Lee, 83, still uses about 5 acres of the property for cattle. It was Larry Lee and Joyce Martinazzi who, 40 years ago, bought that handful of acres containing “volunteer” strawberries. He’d planned to use the land for cattle but found selling u-pick strawberries more profitable.

Larry’s son, Craig, 57, grew up on “the home place” a couple of miles down the road from the farm’s current base of operations, where Annie, 26, and her husband, Noah, live. Craig, an Oregon State alumnus, purchased the family farm 25 years ago and began broadening the operation.

Annie is part of a sixth generation that includes sisters Erika, 34, Teagan, 31 and Kara, 29, and brother Tommy, 16. The seventh generation is a five-member group ranging from ages 2 to 9.

**Farming, family and fun are the pillars of the plan designed to keep Craig Lee, his daughter Annie Lee-Bartelamia and the rest of the bloodline in business in the Tualatin Valley for years to come.**

“We’re expanding,” said Annie, who manages the 120-acre Lee Farms operation under Craig’s ownership. “A couple of sisters had gotten other careers, and everybody is kind of migrating back. We’re changing our layout, adding more attractions. We see ourselves in next five to 10 years doubling. Right now we use 10 to 20 acres of it for entertaining, and we’re looking to use the whole farm.”

**LOCATION: TUALATIN | FOUNDED: 1869 | GENERATIONS IN THE BUSINESS: FOUR**

## Excellence that Endures

### 2002 WINNER

**Nita Werner, Ornelas Enterprises, Inc.**  
 “Separate family and business. At the end of day we are family and do not take business matters home. Have the same high expectations for family as you would from any employee.”

### 2003 FINALIST

**David Foglio, First Response, Inc.**  
 “Start planning early when family members show interest in your business. Join the Austin Family Business program. Seek professional help for the transition. Pray for guidance for your family and your business.”

### 2004 WINNER

**Issac Kearns, C&D Landscape Company**  
 “Cherish relationships; they are more important than the business. Let work time be work time and family time be family time.”



### 2005 WINNER

**Tanna Oberlander, Pro Weld Inc.**  
 “You’ve got to have raw grit, laser-sharp vision and integrity for sustainable success. To thrive in business it takes Olympic-style, white-knuckle resolve to focus on the value you bring to customers, to be relevant and disciplined in a world of setbacks, distractions and unpredictable market changes.”

### 2005 WINNER

**Karolyn Neupert Gordon, Consolidated Supply Company**  
 “Hold your vision high and communicate it over and over again. When in a tough spot remember when there is a will, there is a way. Include as many team members as is humanly possible in your vision; the results will be outstanding.”

### 2006

*The Ties to the Land curriculum, designed in collaboration with the College of Forestry, is launched statewide to assist family forestland owners. The award-winning curriculum is delivered throughout the United States.*

### 2007 WINNER

**Lester de Asis, Benchmade Knife Company, Inc.**  
 “Without seeking the assistance of the Austin Family Business Program, our family would have been far less equipped to fully understand,

plan and execute the many critical personal and professional aspects involved in preparing and successfully transitioning the next generation family leadership within our business!”



### 2008 WINNER

**Kay King, R&R King Logging**  
 “Success demands sacrifice. Long-term success in family business is built on good character and ethics, detailed business practices, an understanding of the importance of community involvement and making a detailed succession plan a high priority.”

2015 Family Harmony Finalist

# Nicholas Restaurant

Hilda Dibe has a plan for enticing the next generation of her family into keeping the Nicholas Restaurant empire going strong.

“Raising kids and running our business is one continuous spectrum of my philosophy of life,” said the 39-year-old mother of three young children, the oldest a 10-year-old named Nicholas after his late grandfather. “I have learned to limit my availability to staff, and that ‘away time’ embodies some of my best leadership training with my kids. If the kids saw me for only a few minutes after long hours at work, they would have little incentive to follow on into our business.”

Hilda is the youngest of the four daughters of Nicholas and Linda Dibe, who left their native, war-torn Lebanon in 1982. Hilda, still fluent in Arabic though she speaks English with no accent, was 6 when her parents packed up their family and immigrated to Portland, where one of Nicholas’ relatives had earlier settled.

In 1985, Nicholas cashed in his retirement account from Air France, for whom he had worked in public relations for more than three decades, and opened a pizza and calzone eatery on Grand Avenue in southeast Portland. As Nicholas and Linda built a following, they began adding traditional Middle



**Linda Dibe, Hilda Dibe and Nathalie Zerka**

Eastern fare to the menu, and the business gradually grew to become Nicholas Restaurant Lebanese & Mediterranean Cuisine in three Portland-area locations.

Hilda was just 22 when her parents were ready to step away from day-to-day management, but she’d spent her life preparing to take over. Building on the foundation laid by her father, Hilda opened a north-east Portland location in 2003 and another in Gresham, where she went to high school and still lives, in 2010.

Hilda’s father died in 2009 at age 74. Her mother is 74 and still regularly taste-tests the food, and Hilda’s 26-year-old niece, Nathalie Zerka,

is part of the management team. Nathalie is the daughter of Hilda’s sister, Nada. The other two sisters, Hoda and Mirna, operate their own southeast Portland restaurants, Hoda’s Middle Eastern Cuisine, and Ya Hala.

“My parents’ vision of common ground and of seeking harmony are cornerstones of our businesses,” said Hilda, noting her entire family gets together for a raucous meal each Sunday. “Our culture is one of loud discussions and heated debate but at the end of the day we all come together, hug, and prepare for another week of serving great food to our wonderful diners.”

**LOCATION: GRESHAM | FOUNDED: 1986 | GENERATIONS IN THE BUSINESS: THREE**

## 2008 WINNER

**Jodi Grimmert Ozen and Thomas Grimmert, Glass Alchemy**

“Communication is essential to the success of the business and the health of the family relationships within and outside of the company. Don’t assume the rest of your family understands where you are coming from just because you explained your perspective to them. If the stress of working together begins to impact family relationships outside of work, reach out to a third party.”



## 2008

*AFBP hosts the first statewide conference for university students from family businesses.*

## 2008 WINNER

**Jim Fowler, James W. Fowler Co.**

“Consistent perseverance through life enables you to far exceed your expectations. Never underestimate the skill and ingenuity of future generations.”

## 2009 WINNER

**Mark A. Johnson, Sid Johnson & Co.**

“Family business is a true lifestyle fraught with challenges and changes that are outshined with the abundance of family love and respect. Other than the need for pluck and aplomb, the truest elements for family business success are sharing morality, faith, integrity, equality and sacrifice, all of which are applied with indomitable communication.”

## 2010 FINALIST

**Robert Schultens, Ray Schultens Motors**

“It has been said, ‘To be successful, you have to have your heart in your business, and your business in your heart.’ I can’t think of anything that makes me more joyful than when that heart is the heart that our family shares together.”

## 2011 WINNER

**Alison Sokol Blosser, Sokol Blosser Winery**

“Do business with people you like and who share the same values.”



## 2015

*The Austin Family Business Program receives the Interdisciplinary Award from the Family Firm Institute, the oldest and most prestigious multidisciplinary professional association for international family enterprise, for exemplary success in using an interdisciplinary approach to the delivery of services.*

2015 Generational Development Finalist

# Newberg Steel & Fabrication, Inc.



Left to right: Jennifer Lane, Jessica and Landon Kinion, Jackie and Jeff Lane

Combining a talent for growth with a passion for community, Jeff and Jackie Lane and their daughter, Jessica Kinion, have forged a company as strong as its signature product.

Newberg Steel and Fabrication traces its roots to the 1951 launch of Vic's Battery Service by Jackie's parents, Vic and Betty Snyder. Eager to please his growing customer base, Vic made a habit of saying yes.

"Every time someone would ask him for something, he'd add that to his business mix," said Jackie, 64, Newberg Steel's secretary/treasurer. "In the early '60s, he had a tow truck as one of his services. Some of the cars he towed in, he'd scrap them out and take them into Portland. A lot of those scrap places were next to steel distributors, so he transitioned the business into Newberg Steel and Salvage. He started investing in inventory for steel, and the battery portion went away. It was a mom and pop business until his health started to deteriorate in '96."

Two years later, Jackie and her husband, who'd been in the home building business, bought the company, modernizing the facility along with upgrading and expanding the inventory and services.

"We invested in some equipment," said Jeff, 65, the company president. "When you're selling raw material you can only make so much money, but if you can cut it or punch holes in it, you can add to the bottom line."

"Typically people who buy steel are welding it, so we started carrying welding gases and supplies, then we added welding equipment, and then welding machines as well. Then we went with an additional product line — we added trailer parts."

Serving as Newberg Steel's general manager is Kinion, 28, the elder of Jeff and Jackie's two children. Jennifer Lane, 25 works at Nike. Both girls grew up in Newberg Steel and, like Jackie, graduated from Oregon State. Jessica's husband, Landon, is the chief estimator and project manager for fabrication.

"We do a lot of service projects through the business," Jeff said, noting the philanthropic example set by another Newberg business family, the Austins. "Part of the fun of making money is to give it to others."

**LOCATION: NEWBERG**

**FOUNDED: 1951**

**GENERATIONS IN THE BUSINESS: TWO**

## Family Business 360°

The premier source for family business education and networking

Expert advisors and family business executives deliver actionable ideas and inspirational insights to help you thrive in today's family business environment.

Bring family members to start conversations about multigenerational issues. Registration is limited to business-owning families.

[BUSINESS.OREGONSTATE.EDU/FAMILYBUSINESSONLINE](http://BUSINESS.OREGONSTATE.EDU/FAMILYBUSINESSONLINE)

## 2015-16

All workshops start at 7:30 a.m. and end at 9 a.m.

**REGISTER** online or or call 800-859-7609

**December 16**

**Elder Owners: Care Concerns for the Family and the Business**

Robynn Pease, Ph.D., Oregon State University

**January 14**

**The Middles: Transition Planning for the Second Generation**

Dean Sandow, Farleigh Wada Witt; Don Bielen, The Rainier Group

**February 10**

**SBA Financing Solutions to Support Business Transition**

Jennifer Prouser, KeyBank

**March 9**

**Getting the Most Out of Your Professional Advisors**

Josh Bratt, Morgan Stanley Global Wealth Management

Vanessa Usui, Duffy Kekel LLP

**March 16**

**"The Owner's Kid": Building Competency to Lead the Business**

Christen Picot, Durham and Bates Agencies, Inc.

**April 13**

**Parent, Owner, Mentor, Spouse: Untangling Roles for Clear Conversations**

Mark Wickman, Family Business Counsel

**May 18**

**Succession and Transition Decisions for Every Stage of Your Family Business**

Donald Bielen, The Rainier Group

## Podcasts

Past events are available as audio podcasts on our website.

**Hot Topics in Employment Law for Family Business**

Amy Robinson

Jordan Ramis PC

**Choosing and Cultivating the Right Team to Transition Your Business**

Don Krahmer and Matt Bisturis

Schwabe, Williamson & Wyatt

**Cashing Out and Buying In: The Dual Financial Challenges of Family Business**

Norman Duffett

Orca Capital Securities LLC

2015 Generational Development Finalist

# Hagan Hamilton Insurance

**When Rick John first reported to work as a salesman at Hagan Hamilton Insurance more than three decades ago, not much awaited him. As in, a phone, a phone book and a “good luck.”**

Cold-calling as if his family’s existence depended on it, which it did, John worked his way into part ownership of the agency within 10 years, sole ownership in another nine. Now his sons Brian and Jason, 34 and 33, respectively, are part of the leadership team as well as the 105-year-old agency hums along with four dozen employees who are treated like family, too.

“We’re sort of a unique size,” said Jason, the chief operations officer. “There are a lot of agencies who are under 10 employees, and a lot of huge international ones with hundreds. We’re a fairly large family business. And we’re multifaceted – we do all of it, very evenly balanced. It’s not like we have 80 percent of our business in one area and the others are just kind of there; we have three very strong departments.”

Those departments are business insurance, home and auto, and life and health, and Hagan Hamilton also offers flood insurance and retirement planning.

Rick remains the chief executive officer, and Brian is the chief financial officer.

“The business was kind of part of our growing up,” Jason said. “From the time we were little kids, we were thinking this was the only place to work.”

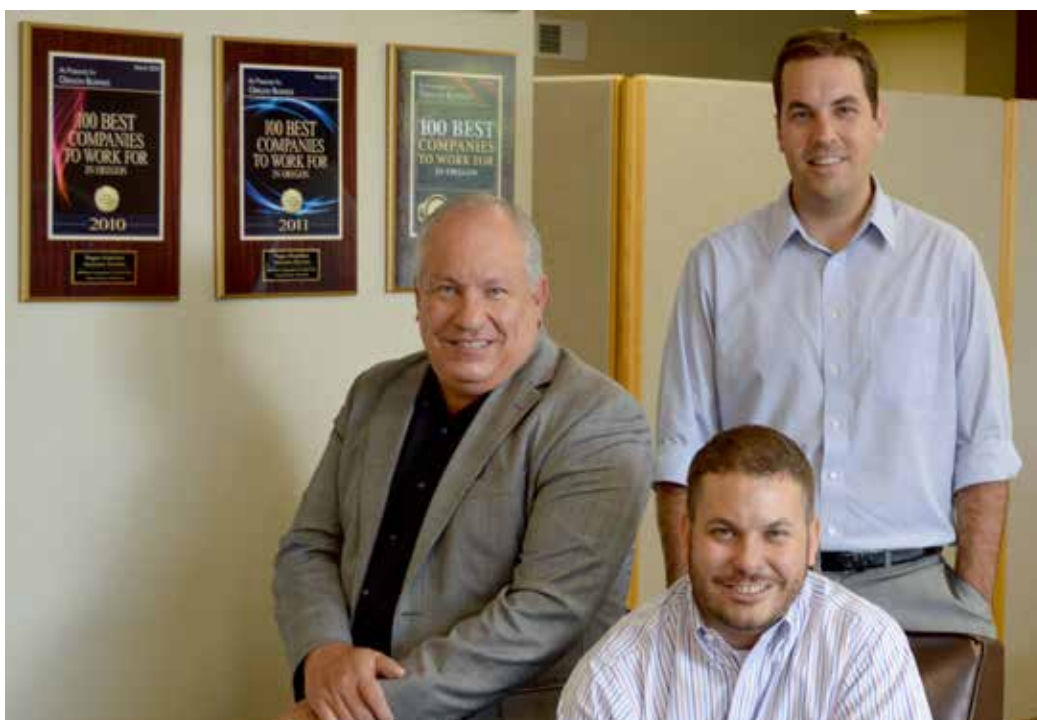
“We meet every Monday morning to discuss current issues, ongoing projects and growth opportunities,” he added. “We also go on weekend retreats a few times a year for deeper strategy sessions. In each meeting, a balance is found between work conversation and family conversation. Anyone in a family business

knows there are tough times you will go through as a family. Rick makes himself responsible for setting the tone that at the end of the day we are all family, and that that is the most important thing.”

Rick has begun the process of transferring ownership to his sons; a buy-sell agreement has been implemented.

“A great deal of time and effort have been put into strategic, long-term planning to ensure that Hagan Hamilton will be successful for future generations,” Jason said.

**Left to right: Rick, Brian and Jason John**



**LOCATION: McMINNVILLE**

**FOUNDED: 1910**

**GENERATIONS IN THE BUSINESS: Two**

# Recipients of the Excellence in Family Business Awards

Abeton Group  
A-dec, Inc.  
Advanced Wealth Management  
Aggregate Resource Ind.  
Air Filter Sales and Service, Inc.  
Airefco, Inc.  
Alan Brown Tire Center  
Anderson Family Farm  
ArborBrook Vineyards  
Batzner Construction, Inc.  
Beacock Music Company  
Beaverton Foods, Inc.  
Bedmart Inc.  
Benchmark Knife Company  
Bike Newport  
Bill Naito Company  
Blue Raeven Farmstand, LLC  
Boyd Coffee Company  
Bronleewe, Inc.  
C&D Landscape Co.  
CA/OR Broadcasting, Inc.  
Capital City Companies, Inc.  
Capitol Auto Group  
Carl Greve Jewelers  
Cascade Publications, Inc.  
Cat Hospital of Portland  
Central Homes  
Chin's Import Export Company, Inc.  
Chown Hardware and Machinery  
Chrisman Deveopment  
Clatskanie Chief Publishing Co.  
CM & WO Sheppard Inc.  
Coelho Winery  
Colas Construction, Inc.  
Collier Arbor Care  
Conser Homes, Inc.  
Consolidated Business Machines  
Consolidated Supply Co.  
Cooley's Gardens, Inc.  
Corvallis Custom Kitchen & Baths  
Courtesy Janitorial Services, Inc.  
Cutsforth's Thriftway Marketplace  
David H. Sutherland & Co., Inc.  
Day Family of Businesses  
Denton Plastics  
DeSantis Landscapes, Inc.  
Diversified Welding Works, Inc.  
Drake's 7 Dees Garden Center & Landscaping  
Duck Pond Cellars  
Eagle Newspapers, Inc.  
East Oregonian Publishing Co.  
Ediger's Church Furniture  
Evergreen International Aviation, Inc.

Fall Creek Farm & Nursery, Inc.  
First Response, Inc.  
Fitzpatrick Painting, Inc.  
Flaming Medical  
Freres Lumber Company, Inc.  
Fruithill Inc.  
Garland Nursery  
General Tool & Supply Co.  
Generations, L.L.C.  
Gimre's Shoes, Inc.  
Glass Alchemy, Ltd.  
GloryBee  
Gomberg Kite Productions Intl  
Gormely Plumbing & Heating  
Hagan Hamilton Insurance  
Halton Company  
Healthy Pets Northwest, Inc.  
Heceta Head Lighthouse Bed and Breakfast  
Henningsen Cold Storage Co.  
Henry A. Schroeder & Sons  
Hessel Tractor & Equipment Co.  
High Cascade Printing  
Hillsboro Implants & Periodontics  
Hotchkiss Company Inc.  
Hybrid Real Estate  
IB Roof Systems  
Interstate Roofing, Inc.  
JaCiva's Chocolatier  
Jag Forms  
James W. Fowler Affiliates  
JLE Enterprises, Inc.  
John Helmer, Haberdasher, Inc.  
Josephine County Title Company  
Kadee Quality Products Co.  
Kelly's Home Center  
Koeber's Inc.  
Kraemer Farms  
La Costa Verde, dba Andina Restaurant  
Lacey Glass, Inc.  
Lacey's Bomber Rest. & Catering  
Lakeside Lumber Company  
Lamont Featherland Farms Inc.  
LaRog Jewelers  
Lawrence's Jewelers  
LAZERQUICK  
Lee Farms  
Les Schwab Companies  
Leupold and Stevens  
Lonely Lanes Farms, Mt. Angel  
Loy Clark Pipeline  
Lukas Auto Painting and Repair  
Lum's Auto Center

Madden Industrial Craftsmen  
Mater Engineering  
Mattress World, Inc.  
McGuire Bearing Company  
Medford Fabrication  
Meisel Rock Products.  
Melvin Mark Companies  
Meyer Sign Company of OR  
Micro-Trains Line Co.  
Miles Fiberglass & Composites  
Mill End Store  
Morse Brothers, Inc.  
Mo's Enterprises  
Musgrove Mortuaries & Cemeteries  
Nature Bake/Dave's Killer Bread  
Naumes, Inc.  
Neil Kelly Company  
Neilsen Manufacturing, Inc.  
Nesko Rock  
Newberg Steel & Fabrication, Inc.  
Nicholas Restaurant  
North Lincoln Sanitary Service  
Nosler, Inc.  
O'Keefes Working Hands Crème, Inc.  
Old Dominion Collision Repair  
Oliver Insurance  
Olshen's Bottle Supply Co.  
Olufson Designs LLC  
O'Neill Pine Company  
Oregon Coffee & Team  
Ornelas Enterprises, Inc.  
Otto's Sausage Kitchen, Inc.  
Paradise Harley-Davidson and Buell  
Peninsula Glass Company  
Portland Transmission Warehouse  
Powell's Books  
Power Equipment Systems  
Pro Weld, Inc.  
ProWorks Corporation  
R & R King Logging  
Rainbow Carpet Cleaning  
Raindogs  
Ray Shultens Motors  
Reece & Associates, Inc.  
Register Guard  
Roberts Motor Company  
Robnett's Hardware Inc.  
Roe Motors  
Rose City Label Company  
Roth & Miller Autobody, Inc.  
S. Brooks and Associates  
Sabroso Company  
Second Glance/The Annex  
Security Signs

Shonnard's Nursery, Florist & Landscape  
Sid Johnson & Co.  
Silver Eagle Industries  
Skanner News Group  
Skipanon Brand Seafoods  
Snyder Roofing & Sheet Metal  
Sokol Blosser Winery  
Solar Summit  
Specialty Polymers, Inc.  
Speed's Towing  
Starker Forests, Inc.  
Stewart Stiles Truck Line, Inc.  
Stronglite, Inc.  
Sunset Farm and Nursery  
Sweeney Promotions Inc.  
Tec Laboratories, Inc.  
Teeny Foods Corporation  
The Bookkeeping Company, LLC  
The Cherry Country  
The Fisher Ernst Group  
The Hanson Family Singers  
The Joel Palmer House  
The Ulven Companies  
The Victory Group, Inc.  
Thermal Mechanical, Inc.  
Thompson's Sanitary Service, Inc.  
Timmco Insurance, Inc.  
TNT Builders  
Tomco Electric, Inc  
Twelve-Mile Disposal Service  
TWGW, Inc.  
Tyco, Inc.  
Typhoon!  
Umpqua Dairy Products Co.  
Unger Farms, Inc.  
United Disposal  
Valley Fire Control  
Van Natta Public Relations, Inc.  
ViewPlus Technologies, Inc.  
ViewPoint Construction Software  
Wanderlust Tours  
Weisinger's Winery  
Wentworth Auto Group  
Western Communication  
Western Fluid Power Corporation  
Wilcox Farms  
Wildish Land Company  
Wilfs Restaurant and Bar  
Willamette Valley Pie Company  
WSC Insurance  
Yoshida Group of Companies