



News Briefs

July 2003

Facilitation Training

July 16, 2003

Reeve Memorial Union, UW Oshkosh

Recognizing the need to have more facilitators available to assist with program and group discussions, the Forum is offering this “bonus” program to all Forum members and sponsors.

Dale Feinauer, professor of human resource management at the College of Business, will again provide this excellent training.

Dale does national facilitation for many large groups and is highly skilled. He will provide the basics of facilitation along with tools and techniques, practical cases, and exercises.

Facilitation skills and tools are essential for effective business managers and executives. They should be a part of every business person’s skill set.

Whether you have previously been trained or not, this is an excellent opportunity to build and/or refresh your skills.

Be sure to register for this session by no later than July 11. For more information or reservations, contact Ann Stein at steina@uwosh.edu or (920) 424-1541.



Blomquist Benefits, LLC, and Terry Maves, director of Pharmaceutical Services for Touch-Point, .

As one of the group session leaders, Jim Janes will call on his experience as a business representative to the Wausau Insurance Company Appeals Board, as a member of Governor Thompson’s Private Employer Health Care Coverage Board, and as a representative of the National Federation of Independent Businesses and the Independent Business Association of Wisconsin before the Assembly Committees on Health and Small Business on health issues.

As part of the program, Richard Blomquist will focus on *health care costs—now and in the future* and the *to do’s* related to managing health care costs. Terry Maves will help us understand the *cost drivers related to health insurance*.

Following these presentations, the participants will attend sessions focusing on *best practices, experiences, and specifics* of health insurance for their business size.

The morning will conclude with a question and answer session designed to ensure that all participants get the answers they seek.

As this is an important topic, you are encouraged to invite your associates to join you for this program and mark the date on your calendars.



Managing Health Care Costs

September 11, 2003

Liberty Hall, Kimberly

You, our members, made this the number one program topic for this year when you voted last September on topics. The Program Committee is very pleased to offer this well-organized program specifically for family businesses.

One of our charter members, Jim Janes, president of Oshkosh Marine Supply, has been very helpful, applying his experience to outline the program and secure presenters Richard Blomquist, president of

Continuity at Family Owned and Managed Marion Body Works

Family owned and managed Marion Body Works will continue its “Tradition of Quality” as Chairman Vinson R. “Bud” Simpson retires and his son Jim Simpson and son-in-law Curt Ignacio assume fuller responsibilities. The change will occur August 9th, Bud’s 75th birthday.

Bud is a 1950 engineering graduate of MIT and a 1955 MBA graduate of Indiana University. He

worked for 25 years with the Trane Company of La-Crosse, ending as a director and President of the NYSE, Fortune 500 company. He then joined the privately held Marathon Electric Manufacturing Company as President and Director. In 1980, he purchased Marion Body Works from the Schutte brothers.

Marion Body Works is a manufacturer of commercial truck bodies, rescue and fire apparatus, truck cabs and specialized military/government products for accounts throughout the United States.

In 1993, on the occasion of Bud's 65th birthday, Jim Simpson was elected president/CEO and Curt Ignacio, president/COO of the business. Both men had successful careers underway in Chicago and San Jose, respectively, before deciding to join Bud at Marion Body Works.

Bud says that the Forum was instrumental in aiding them in their succession planning. He attributes their co-presidency of Jim and Curt, Board with outside directors, and family council to programs and networking that occurred as part of the Forum.

We wish Bud all the best as he retires from Marion Body Works to a number of interests, including trombone playing, that he has been building over the years. We look forward to Bud's continued role on the Forum Board and to seeing Bud and his wife Betty from time to time at Forum programs, and to the continued participation of Jim and Curt.



Affinity/Peer Group Meetings

Best Practices Group:

The New Tax Bill—Real Jobs? Real Growth?

Grant Thornton, Appleton

July 15, 2003

11 am—1 pm

Grant Thornton will host this lunch meeting in their College Avenue offices. The presenter, Keith Depies, is a senior manager in the tax practice. His primary focus is working with closely-held companies in the manufacturing, service, and distribution areas. He has significant experience working with complex family groups with multiple entities, trusts, and private foundations.

Keith provides the following description of the session which will include adequate time for questions.

“Making sense of the third major tax bill in three years of President Bush's presidency can make your head spin. We



would like to invite you to learn more about the most recent tax law legislation and find out what impact this major tax act will have on you and your family business.”

Reservations for this meeting are due to Sue Schierstedt at schierss@uwosh.edu or (920) 424-2257 by no later than 9:00 am on July 14, 2003.

Contract Negotiations

McCarty Curry Wydeven Peeters & Haak LLP

September 17, 2003

11 am—1 pm

At the request of one of our members who had recently gone through some challenging contract negotiations, Kurt Wanless and Scott Barr have agreed to present this workshop. They explain that “Contract reviews and negotiations happen in your business every day, whether you think about it or not. We'll tell you what to look for, where to find it and how to get the best results from your staff and your attorneys.”

Successors Group:

Family Business Tours and Fish Boil

JAG Outdoor Advertising, Algoma, WI

July 18, 2003

1 pm—????

Jane Sweasy, daughter of the company founder, Gerald (JAG) Haegele, has planned an enjoyable afternoon and evening for the Successors, many of whom have invited other family members to join the group for the day.

Jane has planned visits to two family businesses — JAG Outdoor Advertising and von Stiehl Winery, an introduction to the family's other properties along the shores of Lake Michigan in Algoma, an introduction to the heritage of Algoma, and a fish boil. She has also invited the group to remain overnight and go fishing on Lake Michigan, Saturday morning, on Jag's newly acquired charter fishing boat.

Dan and Joe Kobussen are providing a round trip coach for those who do not plan to stay until Saturday. As we know from other Successors trips, which have been courtesy of Kobussen Buses, this allows everyone to fully enjoy the day and each other's company.

Registration for this gathering are required by July 11. Contact Sue Schierstedt at schierss@uwosh.edu or (920) 424-2257 with the names of those attending and whether or not you will be riding the coach.

Celebration!

As our nation celebrates freedom and human rights with flag waving, parades, and fireworks on the 4th of July, the Forum is celebrating the beginning of its eighth year.



We have much to celebrate. Ten family businesses, three sponsors, and the College of Business participated in the Forum during its *first* year, 1996-97. Since then we have celebrated many *firsts* including an international family business workshop, a family business electronic mail list service with over 100 users, significant membership growth, an unprecedented number of sponsors, the addition of peer/affinity groups, a family picnic, golf outings, annual dinners, and much more. Our latest *first* is the additional of officers and an Executive Committee to our Board.

The Wisconsin Family Business Forum has been extremely fortunate to enjoy the continued participation and commitment of many outstanding family businesses over the years. In total the Forum has worked with 47 family businesses as members and has directly communicated with over 878 family businesses in northeast Wisconsin.

We are proud of our contribution to the success of regional family businesses and look forward to continued growth and success in the coming years.

Thanks to all of you who have helped contribute to the Forum's success!

Have an enjoyable and safe 4th of July! Plan to join us mid-July for special programming—Facilitation Training, Best Practices and Successors—and in September for the start of our program year.

Members Only Site

As the Wisconsin Family Business Forum continues to grow, keeping the directory current has been an ongoing challenge. At the suggestion of several members, we are adding a *Members Only* section to our web site.

Effective mid-July, our entire WFBF directory will be available on-line from our home page. This will offer the following advantages:

- ✓ Updated information available to all members and sponsors immediately.
- ✓ A considerable savings to the Forum in printing and postage costs, thereby assuring you that your membership and sponsorship dollars are being used wisely.

All information, while accessed through the WFBF web site, will be secure, and available only to WFBF members and sponsors.

Members and sponsors will be notified of the access procedure when the directory can be accessed on-line.

Wisconsin Family Business Forum Program Calendar— 2003

Date/Time	Topic/Event	Presenter(s)
Sep 11	Managing Health Care Costs	Richard Blomquist, <i>Blomquist Benefits, LLC</i> , Jim Janes, <i>Oshkosh Marine Supply</i> , & Terry Maves, <i>TouchPoint</i>
Oct 22	If and/or When has the Business Outgrown the Family	Michael Altschafel & Mark Johannsen, <i>Grant Thornton, LLP</i>
Dec 2	Agreements—Buy/Sell, Shareholders, Prenups	Kevin Eismann, <i>McCarty Curry Wydeven Peeters & Haak, LLP</i>
Jan 20	Disaster Planning	Kerry Connor, <i>MassMutual Financial Group</i> & Pam Baumann & Lisa Powers, <i>PAMCO</i>
Mar 10	Managing Change in the Family Business	Bob Shaver, <i>Executive Education, UW-Madison</i>
May 3	8th Annual Dinner: A Family Business Heritage	Craig Culver, <i>Culver's Franchising Systems & Culver's Frozen Custard</i>
June TBD	5th Annual Golf Outing	TBD

Reciprocity Program

The Wisconsin Family Business Forum, the Family Business Center (UW-Madison), and the Center for Family Business (Marquette University) have designed this program so members can attend programs at all three sites. Essentially this means triple the educational programs for little more than the annual fee. See the Alliances link from our home page for program listings at the other sites.

The Forum thanks the following sponsors for contributing significant value to keep the Forum at the forefront of family business forum programs, worldwide:



First National Bank — Fox Valley has a competitive advantage of developing strong, close customer relationships, especially in the niche of family-owned businesses. Thanks to a dedicated staff, FNB has completed its 113th year of providing financial services to the people and businesses of the Fox Valley with locations in Menasha, Neenah and Oshkosh.



Grant Thornton LLP is the leading accounting, tax, and management consulting firm dedicated to serving the needs of middle-market companies. Their mission is "To help middle market companies achieve their business and financial goals" by providing services that deliver measurable value to their clients. Founded in 1924, Grant Thornton is one of the global seven accounting firms, serving public and private middle-market clients through 47 offices in the United States and in 109 countries through Grant Thornton International.



McCarty Curry Wydeven Peeters & Haak, LLP has been serving the legal needs of large and small family businesses in northeast Wisconsin since 1949. The firm's services include all aspects of business and corporate law, real estate, complex estate planning, commercial and personal litigation, as well as general practice.

Retained
Earnings
Company



Retained Earnings Company/MassMutual Financial Services has recognized excellence in providing family owned businesses with the product tools that allow for the confident construction of estate and business succession plans. The firm brings experience, education, empathy and motivation to clients' quest for financial growth and security. Retained Earnings is acknowledged as the premier provider of pension and investment products, life and health insurances.



University of Wisconsin Oshkosh, College of Business Administration provides undergraduate and graduate education with a wide array of outreach services to benefit economic development in northeast Wisconsin. The faculty and staff are professionals dedicated to being quality teachers, accessible to students; furthering knowledge through research; and serving as valuable resources to the University and community. A key strength of the College is providing professional expertise through personal contact among students, faculty, and members of the community.



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