Wisconsin Family Business Forum
2004-2005 PROGRAM CALENDAR

August 26, 2003, 8:00 am—noon
Facilitation Training
Dale Feinauer, College of Business, UW Oshkosh
Meetings are more effective when they are properly facilitated. A good facilitator can ensure any or all of the following depending on the situation:
- a well-considered decision,
- creative idea generation,
- group effectiveness,
- concept ownership and commitment to action,
- conflict resolution.
Through this interactive workshop, members and sponsors will learn to differentiate between facilitation and leadership, will acquire tools and techniques for varied situations, and will develop skills for effective facilitation.

Reeve Memorial Union, UW Oshkosh

September 16, 2004, 7:00 a.m.—noon
Seven Habits of Highly Successful Successors
Dean Fowler, Dean Fowler Associates Inc.
In this workshop, Dean Fowler illustrates the seven habits common to successful transitions. Traditionally, succession planning in family-owned companies is driven by the senior generation. But, the underlying message learned from Fowler’s research over the past 20 years is that successful transitions are driven by the proactive involvement of the successor generation. The successors, not the senior generation, must create and implement the vision for their future success. The seven habits will be illustrated through the discussion and case examples.
The workshop explores both the emotional and financial aspects of strategies used to transact inter-family purchases of the family business, and thereby shift the financial risks and the corresponding rewards to the next generation of business leaders in the family. These strategies will be illustrated through the discussion of case examples.

Tornado’s, Appleton

November 3, 2004 3:00 p.m.—6:00 pm
A Tough Nut to Crack—Written by Ira Bryck, director, UMass Family Business Center; directed by Nick Simms
We are proud to present—as “edu-tainment” - one-act play based on a true story of a father and son, and the company they keep. The author of the play, Ira Bryck, tells the story of his family business—a 90 year old, 4th generation childrenswear retail business on Long Island, NY—in which he worked for 17 adult years.
The play will benefit you by:
- giving you a “fly on the wall” view of a business family facing many classic issues,
- providing a unique opportunity to examine your thoughts and feelings about your family’s reactions to this real life drama, and
- breaking the ice on important discussion you may have about your own situation.
Following the production, facilitated discussion of the issues will enhance the learning experience.
“A Tough Nut to Crack is tough not to enjoy. It is a poignant, funny, insightful, relevant, thought-provoking play that sparks discussion and laughter. The University of Toledo Center for Family Business is proud to have presented this play to more than 220 enlightened participants. The impact of the conversation will expand and last throughout the years.” — Debbe Skutch, director.

The play is performed by Nick Simms and Timothy Van Ness of Boston.

Fox Cities Performing Arts Center, Appleton

December 8, 2004, 3:00 p.m. — 6:00 p.m.
Team Building for Family Business Leaders
Tom Wiltzius and Kurt Johnson, Right Management Consultants

This workshop is designed to demonstrate the value of the leadership skill of team building, its multiple models, and the fundamental attributes required for effective team development and maintenance. Aspects of the team leader’s personality, the culture of the organization, and the make-up of team members will be considered and discussed.

Participants will identify and discuss objectives, barriers and pitfalls to building effective teams, witness demonstration of various team leader behaviors, and gain insights to fundamentals of team leader effectiveness, especially when there is family participation.

Participants will learn models of team building, understand the essential behaviors and barriers to relevant models, understand personality and family relationship influences, and become aware of tools and techniques that can be employed in team building.

Tornado’s, Appleton

January 20, 2005, 7:00 a.m. – noon
Incentive Compensation in the Family Business
Dale Feinauer, professor-human resource management & E. Alan Hartman, professor/Dean, UW Oshkosh College of Business

This workshop will focus on incentive compensation for family and non-family members. Issues will include

- the magnitude of incentive compensation and how to structure it,
- bonuses, phantom stock, profit sharing,
- managing the differences in compensation between family and non-family employees,
- approaches to setting compensation for different employed family members, and
- balancing the confidentiality of profits with incentives.

A revision of the compensation survey that was distributed to members several years ago will be sent to members in advance of the program and results will be incorporated in the workshop.

Butte des Morts Country Club, Appleton

March 8, 2005, 1:00 p.m. — 5:00 p.m.
Developing Responsible Shareholders
Drew Mendoza, The Family Business Consulting Group

We invited Drew to lead another Forum workshop because he is so engaging and provides stimulating issues to consider.

As part of this workshop, Drew will help us consider and discuss:

- the five critical areas to manage well,
- the formula for effective ownership,
- accountability measures,
- characteristics of effective owners
- ownership requisites, and
- more...

Drew’s highly interactive style, his wit, and his command of the topic promise to make this a valuable and enjoyable workshop.

Butte des Morts Country Club, Appleton

May 2, 2005, 5:30 p.m. — 9:00 p.m.
9th Annual Dinner — A Family’s Heritage and Legacy—U.S. Oil Co., Inc.
The annual dinner is an opportunity to get together with other owners, their spouses and non-family executives to share cocktails and dinner, to celebrate the Forum’s year, to recognize outstanding members, and to hear the story of a recognized family business owner.

This year’s story will be presented by Art Schmidt, founder of U.S. Oil Co., Inc. Art will talk about growing the business; working with parent, siblings and spouses; and transitioning to the next generation.

Tornado’s, Appleton