July 16, 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

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September 11, 2003, 7:00 am—noon

**Managing Health Care Costs**

Richard Blomquist, Pres., Blomquist Benefits, LLC
Terry Maves, Director of Pharmaceutical Services, Touchpoint Health Plan
Jolene Thorson and Robert Maasch, Midwest Insurance Brokerage, Ltd.
Craig Smith, Retained Earnings/MassMutual Financial Group
Gregg Underheim, Chair of the Wisconsin Assembly Committee on Health

This program will provide an update on the health care environment and provide some tangible, take-home information and action plans. Participants will examine the cost drivers related to health insurance and methods for designing a plan and programs appropriate for their businesses.

Small groups, based upon business size, will examine best practices, business experiences, and health care plan specifics.

At the program conclusion, participants will be given the opportunity to discuss any unanswered questions with our experts before the conclusion of the program.

Liberty Hall, Kimberly

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October 22, 2003, 3:00—6:00 p.m.

**If And/Or When the Business Outgrows the Family: Transition of the Family Owned Business**

Mike Altschaefl and Mark Johannsen, Grant Thornton, LLP

The objective of this workshop is to broaden the knowledge base of the participants in the options and the process of transitioning a family owned business. It will focus on three primary options:

- Transition to non-family management
- Recapitalization of the company
- Sale of the company

The session will discuss why this should be a process and not an event. It will cover the pros and cons of each option. It will provide information related to the steps necessary to complete each of the options. It will also cover how to effectively involve family members in the process. In addition, the income and estate tax implications of the various options will be explored.

Butte des Morts Country Club, Appleton

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December 2, 2003, 3:00—6:00 p.m.

**A Potpourri of Critical Legal Issues for the Family Business**

Scott Barr, John Esler, Jennifer Koeppl, John Russo, Christine Wanless, Kurt Wanless
McCarty Curry Wydeven Peeters & Haak LLP

Running your business is a daunting task. You have employment issues, confidentiality issues, copyright, and trademark issues. Add to that the family business nature of your business: buy-sell/repurchase agreement issues,
estate planning issues, and merger and acquisition issues. In short, your family business has issues.

In this 3-hour seminar you will be provided with the solutions to your issues. All participants will be provided with the estate planning answers every family business needs. From there, participants will be able to tailor their program to their family business’ needs by selecting 2 of the following break-out sessions:

- Buy-Sell, Repurchase & Redemption Agreements (John Russo & Kevin Eismann);
- Employment Agreements, Non-Competes, Confidentiality and Intellectual Property Protection (Kurt & Christine Wanless);
- Mergers & Acquisitions: Acquiring rights for the family business (Scott Barr);
- Advanced Estate Planning Topics (John Esler)

Butte des Morts Country Club, Appleton

January 20, 2004, 3:00 — 6:00 p.m.

Disaster Plans
Laura Leitzinger, Oppenheimer Funds
Pam Baumann, PAMCO
Lisa Powers, Career Options

Have you ever written precise instructions regarding what to do in the event of a disaster—your death, business fire, loss of computer system, etc.? Having developed the plan Oppenheimer implemented for the successful evacuation of 600 people from the twin towers in NYC and for their operations by the next day. Laura will provide a framework for building plans that will work for your business to survive a business or natural disaster.

Pam and Lisa have lived through a disaster, the serious motorcycle accident which put Pam in the hospital and out of the office for many months. They will share what they did to keep the business running and what you need to do in the event of a family disaster.

Liberty Hall, Kimberly

March 10, 2004, 7:00 a.m. — 3:00 p.m.

Managing Change in the Family Business
Bob Shaver, Executive Education, UW-Madison

Bob has designed and delivered customized instruction throughout the Midwest. His forte is fully engaging participants in the learning process while presenting information in ways that make it readily applicable.

This workshop will focus on the fundamentals of change management and on strategies for accomplishing change.

- Managing change—the five fundamental building blocks
- Developing the skills of an effective change agent
- A campaign strategy for successful change
- A systems approach to change

Bob will identify the three main reasons change initiatives fail and constructive steps to avoid all three failures.

Butte des Morts Country Club, Appleton

May 3, 2004, 5:30 — 9:00 p.m.

8th Annual Dinner — A Family’s Heritage and Legacy
Craig Culver, president and co-founder of Culver Franchising System, Inc.

Craig grew up in the family businesses: A&W restaurant in Sauk City and the Farm Kitchen. Throughout college he worked in his family’s restaurant in Devil’s Lake called the Farm Kitchen.

Following his graduation from UW Oshkosh with a major in biology, Craig continued in the restaurant industry. That experience evolved into the current business.

Craig has been invited to tell us about his family and business heritage and traditions, as well as the challenges he and his business have faced and overcome, along with his observations about the future of his company.

Butte des Morts Country Club, Appleton