

News Briefs

New Members—

Fox Valley Metrology opened for business in 1996 with four employees including owner Mark Toll. They now have over 100 employees including Mark's son Steve Toll, who recently joined the organization in September 2014 as Sales Manager, and numerous other family members and friends. Headquartered in Oshkosh, Wi, Fox Valley Metrology is a state of the art, full service calibration lab with five locations throughout the Midwest.



Custom Plating Specialist was started by Terry Meetz and his father, Jewel in 1986 as Jewel's Custom Chrome Plating. In July 2004, Terry and his wife, Mary, bought the plating business from Jewel and has been operating as Custom Plating Specialist, Inc. for the past 10 years. In that time, the company has grown from 2 employees to 9 full-time and 2 part-time employees. Located in Brillion, Wi, Custom Plating Specialist is fully insured and does work for clients across the globe. Along with being published as an expert in his trade, Terry travels the country reaching out to his clients at car shows. In addition to Terry and Mary, Terry's son Cody, brother Tim, and brother-in-law Joseph also work in the business.



Best Practices: Family Business Governance

Wednesday, March 11, 2015

7:30 am—Registration/Networking

8:00—10:00 am—Program

UW Oshkosh Alumni Welcome & Conference Center
625 Pearl Avenue, Oshkosh

**Presenters: Robert Mathers and Steve Sorenson
Davis & Kuelthau**

Join Forum partners Robert Mathers and Steve Sorenson of Davis & Kuelthau as they present Best Practices for Family Business Governance. In addition to learning why family businesses are more lucrative than their non-family owned counterparts, you will—

- ✓ **Understand** the interaction of the rights and responsibilities of business owners and how owners (shareholders) interact with directors, officers and other employees of business entities.
- ✓ **Gain** an understanding of how agreements between owners can be used to protect the business and to handle an orderly resolution of disagreements among owners.
- ✓ **Demonstrate** how different choices of entity (e.g. LLC, S-Corporation, etc.) may affect business governance and how businesses typically transition from an autocratic form of governance to a collaborative form of governance and often end up with a consortium form of governance.
- ✓ **Learn** how to incorporate the “4 P’s” of good governance.

To register for this program, visit the Forum website at wbf.uwosh.edu

19th Annual Dinner

April 27, 2015, 5:00 pm

Bridgewood Resort & Conference Center, Neenah

Keynote Speakers: Kim Bassett & Bill Bassett

Bassett Mechanical

The annual dinner is the culmination of the Forum's program year. This event provides members and sponsors an opportunity to network, receive recognitions, enjoy dinner and an opportunity to hear of a family's business heritage in a fun, comfortable environment.

Members and sponsors are encouraged to extend this dinner invitation to regular Forum attendees from their businesses as well as to family members and associates who might not regularly participate. This truly is an event to celebrate the Forum and its partners.

Update on Past Events—

Courageous Conversations: Developing Interpersonal Competence

Presenter, Tony Herrera of Schreiber Foods provided an informative, interactive workshop on courageous conversations on Wednesday, February 18th at the Bridgewood Resort Hotel & Conference Center. Tony travels across the country sharing his knowledge, stories and tools to help folks like us be more confident and have effective (difficult) conversations. He had us laughing, crying, thinking and even role playing. The participants (nearly 60 members, sponsors and guests) were great sports about putting themselves out there to practice Tony's five step approach to courageous conversations. A big "high-five" to everyone who volunteered or was chosen to participate in the role play in front of your peers. Good luck to all of you as you practice the five step process by giving positive feedback.



What did you miss?

If you missed any of the past programs, you missed a lot of excellent discussions and best practices from presenters and your peers.

Topics such as planning for the unexpected, using a board, mentoring and coaching, developing the next generation, selling the business, and leadership are examples of those recordings waiting for you in the *Members Only* section of the Forum's web site.

Don't forget to check out what's available for you and your business.

Member News —

Joe Luedtke earns MBA through UW Oshkosh

Joe Luedtke graduated with a Master of Business Administration (MBA) from the University of Wisconsin Oshkosh at a commencement ceremony held on December 13, 2014. Joe was part of a newly developed Executive MBA path specifically developed for executives and managers.



Along with 17 other executives and business leaders, Joe was part of the first Executive MBA class to be offered at UW Oshkosh. The Executive MBA path uses a cohort system of learning—meaning, every student moves

through the entire 16-month-long program together. "Wonderful group of people to work with week after week. Learned so much from every other student in the class and made the experience that much more enjoyable. Small group structure was a great asset to lean on throughout the entire program and forged concepts and discussion started by the professors and faculty," explained Joe.

Joe Luedtke, Corporate Sales Manager/Buyer at SCP Inc. has been with SCP Inc. since 2010. Joe is also an active member of the Wisconsin Family Business Forum at UW Oshkosh.

The UW Oshkosh College of Business is among an elite five percent of business schools worldwide that is accredited by AACSB, the premier accreditation body for business schools worldwide. UW Oshkosh offers two paths to an MBA that are specifically designed for executives, entrepreneurs and emerging business leaders. More information can be found at uwosh.edu/mba.

Forum News —

I am pleased to inform you that after a very lengthy search & screen process, **Nancy Jo Dietzen** will be joining the Forum on March 2nd as the new Assistant Director. Nancy Jo brings significant experience in the areas of business relationships, customer service, event/program management, organization and communication. She lives in Omro, WI with her husband, Russ and sons Jack and Kyle. Nancy Jo can be reached at wfbf@uwosh.edu and 920-424-1541.

Family Business Education Certificate Program

The Family Business Education Program (FBE) plays a critical part in the development process for family members, non-family managers, and family business advisors.



This program provides its graduates with real-world, relevant information about how to strategize and navigate the waters of family business. Past participants, including senior family executives, next generation leaders, and non-family managers and advisors, have given it the highest marks.

This program is offered to both members and non-members. This year the program will run twice! The first class started in January and will finish up in December. The next class will begin in September and run through April. If you are interested in signing up for the Fall start, please contact the Forum office at (920) 424-1541 or wfbf@uwosh.edu.

New Additions to the Family



Jill & Peter Fry welcomed daughter **Ame-
lia Mae** on Wednesday, February 11,
2015. Everyone is doing great! Jill is 3rd
generation at Merrill Iron & Steel.



Jon & Crystal Faulks welcomed daugh-
ter **Farrah Ann** on Tuesday, February
17, 2015. Jon reports everyone is doing
well. Jon is 3rd generation at Faulks
Brothers Construction.

Congratulations to the new parents and family members!

Peer Groups

There are still some openings in a few of our peer groups. Contact Meridith Jaeger at wfbfdirector@uwosh.edu or 920-424-2257 if you are interested in joining or starting a group. Group composition and space availability is dependent on interest and space as groups are limited in size.

Generation Now

The Generation Now group is made up predominantly of individuals who have taken over responsibility for operating their family business within the last 5-7 years.

Non-Family Executives

This group is composed of non-family presidents, chief financial officers, human resource directors, operations and general managers. The group focuses on their unique roles and responsibilities as part of a family-owned business.

ROOTs

ROOTs (Refining Our Origin and Traits) has defined itself as a loyal and confidential group of family business peers that learn from and support each other through discovering solutions to problems and issues as they occur. This group will focus on their professional and personal development.

Senior Executives

Group members represent the senior leadership in member businesses. They focus on challenges of the economy, transitioning the business to the next generation of ownership and leadership, coaching and mentoring, life after retirement, and other areas of interest.

TBD

This group is composed of individuals whose future roles in their organizations are TO BE DETERMINED (TBD). They focus on issues associated with being the next generation leaders.

Reciprocity with the Family Business Center at UW-Madison

Forum members are eligible to attend the family business lectures offered by the Family Business Center (FBC) at UW-Madison in accordance with our reciprocity agreement.

Members are charged a nominal per person fee for each lecture attended and are required to pre-register for each. Please check their website for the most current listing of upcoming events and for full details see <http://bus.wisc.edu/cped/fbc/events>.

This is an excellent way to stretch your membership to include additional topics and interactions. Please consider taking advantage of this.

Bring a Guest or Be a Guest

Forum members and sponsors have guest tickets for upcoming event which can be issued to interested family business owners and leaders.

Although personal invitations from our members and sponsors are encouraged, any family business that is interested in learning more about participation in the Forum is welcome to attend one program at no charge as our guest. Registration is required for all events and can be made at: <http://wfbf.uwosh.edu>.

From the Executive Director

I have been busy meeting with many members, sponsors and prospects over the past several months. I have enjoyed meeting you, learning about your family and your business and gaining a better understanding of the value the Forum provides to our members and sponsors. Through these conversations, I have heard over and over how helpful our programs are, how fantastic the Family Business Education courses are, how valuable the networking with other family businesses is and most of all the incredible value of participating in a Peer Group. As an organization, we have much to be proud of!

If I have not made it to your location, I hope you will welcome a visit from me in the next couple of months.

Warmly,



Does your website identify you as a Forum member?
Do you link to the Forum's website?

Program Calendar — Spring 2015
Wisconsin Family Business Forum Program Calendar

<u>Date</u>	<u>Event</u>	<u>Presenter(s)/Facilitators</u>	<u>Location</u>
2/18/2015	<i>Courageous Conversations</i>	Tony Herrera, Schreiber Foods	Bridgewood Resort, Neenah
3/11/2015	<i>Best Practices: Family Business Governance</i>	Bob Mathers & Steve Sorenson Davis & Kuelthau	Alumni Welcome & Conference Center, UW Oshkosh
4/27/2015	<i>19th Annual Dinner & Celebration</i>	Kim Bassett & Bill Bassett Bassett Mechanical Forum Members & Sponsors	Bridgewood Resort, Neenah
Register online at http://wfbf.uwosh.edu — Programs/Registrations link			
Family Business Center at UW-Madison Calendar			
	<i>Check the website for upcoming lectures</i>		
Register online at http://bus.wisc.edu/cped/fbc/events			

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



News Briefs © 2015
 Wisconsin Family Business Forum
 UW Oshkosh, College of Business
 800 Algoma Blvd., Oshkosh, WI 54901

Editor: Meridith Jaeger, Executive Director
 Phone: (920) 424-2257 Fax: (920) 424-2280
 E-mail: wfbfdirector@uwosh.edu
 Website: <http://wfbf.uwosh.edu>