



News Briefs

An Outreach Center of the UW Oshkosh College of Business

New Sponsor:

UTECH Customized Organizational Development



On January 8, 2013 we welcomed UTECH Customized Organizational Development as our newest sponsor of the Forum. This organization focuses on defining family business cultures and breaking down the relational barriers that limit personal and company growth. This family owned business includes Ken Utech, Melissa Borowicz, Stephen Utech, and Chris Utech. All of whom have extensive training in family counseling, an advanced skill set that enhances the organizational development process.

Some of the services the Utech's have developed, that enhance leadership development include:

- The Organizational Development Collective
- Value Driver Assessments
- Value Driver Continuum Assessments
- Executive Culture Match Hiring Process
- Leadership Boot Camps
- Couples Boot Camps
- Communication Training Seminars

Let's extend a warm welcome to Ken, Melissa, Steve, and Chris from UTECH Customized Organizational Development when we have the opportunity.

Upcoming Events:

17th Annual Dinner

May 6, 2013, 5:30 p.m.—9:00 p.m.
Butte des Morts Country Club, Appleton
Keynote Speaker: Tom Boldt
Boldt Construction Inc.

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

Update on Past Events:

How Will the Results of the Election Impact my Family Business?

December 5, 2012, 8:00 am—11 am

UW Oshkosh Sage Hall

Panel Discussion to Include:

Ron Altenburg, Schenck, SC

Robert Mathers, Davis & Kuelthau, s.c.

Mickey Noone, First Business Bank

Tony Renning, Davis & Kuelthau, s.c.

James Simmons, Ph.D., UW Oshkosh

This program was very well attended. It was designed to help you understand the results and ramifications of the election and its impact on family owned businesses. Each panelist presented from their area of expertise, with perspectives on taxes, regulation, and lending. The information was relevant and very much appreciated from the participants.

Enterprising Family, A Cohesive Family is Your Strongest Asset

March 7, 2013, 8:00 am—noon
Bridgewood Resort Hotel, Neenah

Presented by: Greg McCann

McCann & Associates

Becoming an enterprising family is a transitional process that requires a family to deepen its understanding of why they are in business together, what binds you together as a family, and how family can be an advantage in the deployment of capital across businesses.

Greg McCann defined a successful enterprising family as:

- Where the family makes a collective conscious choice to own/invest in “enterprises.”
- When the family has clearly defined financial and nonfinancial goals.
- Is able to diversify and manage risks across multiple businesses.
- Is an aligned family, scanning for opportunities that enhance “shareholder value.”

This program was designed to help you develop a shared vision, help you understand the concept of the enterprising family and move it beyond the concept of being in just one business, and also how to start a family action plan.

Greg McCann comes with outstanding credentials. Those who were able to experience Greg’s presentation were able to take away ideas on how to create a new “normal” for their current family business model.

Member/Sponsor Announcements

Business Expansions—SCP, Inc.

There is more to see at SCP, Inc. in Hortonville. They are adding 10,000 square feet of production space, raw material and finished goods storage. The project started in November of 2012 with an anticipated completion date in April of 2013.

SCP, Inc. is a wood packaging company that specializes in new and recycled skids, crates, and pallets. They have three locations, one in Hortonville, another in Plymouth and a third in DeGraff, Ohio.

Please join me in congratulating SCP, Inc. on their expansion efforts.

New Members Rates

Membership rates had not changed in a few years. With the downturn in the economy and the challenges businesses faced during that difficult time, the Forum’s Board of Directors decided not to increase membership rates for the past few years to help our family businesses weather this storm, so to speak.

As we turn the corner, the Board took another

look at membership rates and decided to make changes that would go into effect on July 1, 2013.

The new membership rates are:

- \$1500 for businesses with revenue less than \$1MM
- \$2250 for businesses with revenue from \$1MM up to \$5MM
- \$3000 for businesses with revenue greater than \$5MM

Bonus: New family business members (as defined as any business that has not been a member in the last 10 years) will be able to deduct 50% from their first year’s fee.

Family Business First Awards Of Northeast Wisconsin

First Business Bank, in partnership with the WI Family Business Forum is pleased to announce the Family Business First Awards of Northeast Wisconsin.

Family businesses are the backbone of Northeast Wisconsin. Many of these businesses have a proven track record of success in terms of sales, innovation, economic impact, profits, and employment. Due to the nature of being a family business, many believe strongly in giving back to the communities in which they live. Family Business First Awards have been designed to give proper recognition to these important businesses in Northeast Wisconsin. Nominations are being accepted now and can be made directly by the family business, or by any third party including accountants, attorneys, or customers. Nominations are due April 15, 2013. Nomination forms and details are on the website at:

www.familybusinessfirst.com

Awards will be announced at the Annual Dinner Celebration on May 6.

Scholarship:

Our scholarship committee met recently to review the applications received for the WI Family Business Forum’s Scholarship award. Our Scholarship committee consists of Bill Tallon, Tim Wuest, Jason Lasky, and Tim McKeag.

The WI Family Business Forum maintains a scholarship fund to provide financial support to students of the University of Wisconsin Oshkosh who have an interest in or a connection to a family business. This fund was created primarily from the donations of WFBF members and sponsors. Each year WFBF presents one \$1000 or two \$500 scholarships. In the past five years, eleven scholarships have been awarded.

This April four applications were received. The committee reviewed the applications and decided to award one scholarship for \$1000 to Jenna Bilz.

Jenna is a sophomore at UW Oshkosh majoring in human resource management with a minor in Spanish. Jenna will be introduced and awarded her scholarship at the May 6 Annual Dinner Celebration.

Congratulations Jenna!

Silent Auction

Funding our Scholarship Fund is our Silent Auction. Planning for our 6th annual Silent Auction Fundraiser is well underway. The Silent Auction is held during the Forum's Annual Dinner Celebration. This year that event will take place on May 6 at the Butte des Morts Country Club.

The Silent Auction committee is seeking donations to the auction. If you don't have a product or service to offer as a donation, please consider providing an overnight stay, theater or sports event tickets, or other attractive items. Be creative. It is a lot of fun to look at all the wonderful items donated each year to this great cause.

For more information on the Silent Auction, what items or services to donate, where to send your donations, please contact Donna Nelson at 920-424-1541 or nelson@uwosh.edu.

Family Business Education (FBE) Certificate Program

We have a great class this year attending the Family Business Education Certificate Program. Recently we had a few new people join the class, Robb Langjahr from Aquatic Biologists in Fond du Lac was able to attend the January and February session and Melissa Borowitz and Steve Utech from UTECH Customized Organizational Development joined the class as well. There is just one session remaining for this program year. If you missed this session, please call the Forum office to sign up to attend. If you missed any other session, watch for FBE to begin a new year in October of 2013.

The final session is **April 10, 2013 – Managing Culture, Change and Conflict**

Member & Sponsor Recruitment

Family businesses learn about the value of the Forum primarily through personal invitations from our members and sponsors. Don't keep the Forum a secret. Share your involvement with others and continue to spread the word about the Forum and how it benefits your business.

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. What better way to see what the Forum has to offer than to actually participate in a program and talk with Forum members and sponsors.

At our last program, we had five guests who were referred by our members and sponsors. It was great to see so many guests.

Member and Sponsor information packets are available through the Forum's office in hard copy or in electronic format. To receive a packet, call or email:

Cathy at 920-424-2257 or huyberse@uwosh.edu

Donna at 920-424-1541 or nelsond@uwosh.edu.

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 Social Media in the Workplace and Going Behind the Curtain of a Family Business, plus an Enterprising Family, A Cohesive Family is Your Strongest Asset. These are some of the recent examples of those recordings waiting for you in the *Members Only* section of the Forum's web site.

Director's Report

Another great year of programs is coming to an end. Next year we have a new line-up of exciting topics that will, hopefully, be a great experience for you. Watch for our 2013-2014 program announcement. I think you, too, will agree that there are a lot of great things to look forward to.

In the meantime, our Annual Celebration is nearing. I am looking forward to seeing you on May 6 for our Annual Dinner Celebration.



Cathy

Program Calendar Wisconsin Family Business Forum

<u>Date</u>	<u>Event</u>	<u>Presenter(s)</u>
May 6, 2013 5:30—9:00pm 5:00 p.m. registration and pictures	<i>17th Annual Dinner</i>	Tom Boldt, Boldt Construction Bridgewood Resort Hotel, Neenah
August 14, 2013 8:00 a.m.—noon	<i>Facilitation Training</i>	Dr. Dale Feinauer Professor UW Oshkosh, College of Business
September 25, 2013 8:00 a.m.—noon 7:30 registration	<i>The Innovation Process</i>	Paul Lemens Ensign—Innovation

Register on-line at <http://wfbf.uwosh.edu> — [Programs/Registrations link](#)

Family Business Center at UW-Madison

May 16, 2013 3:00 p.m.—6:00 p.m.	<i>Unintended Consequences</i>	Dr. Deb Houden Wisconsin School of Business-Family Business Center, Madison, WI
May 16, 2013 6:00 p.m.—8:00 p.m.	<i>Spring Social</i>	

Register on-line at <http://wfbf.uwosh.edu> — [Other Resources link](#)

Double Your Educational Opportunities:

As a benefit of membership, Forum members may attend UW-Madison's Family Business Center programs for a minimal per person fee. Registration for Madison's programs as listed above can be made via their website. Register as a "member", indicating Forum membership in the comment section. For more information contact Cathy or Donna.

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

The image displays a collection of logos for various sponsors. From left to right, the logos are: National Bank (with tagline "Fulfilling dreams"), First Business, Associated Bank, Davis Kuelthau (attorneys at law), Principal Financial Group, Schenck (CPAs AND SO MUCH MORE.), UNIVERSITY OF WISCONSIN OSHKOSH College of Business, troi CONSULTING, and UTECH (CUSTOMIZED ORGANIZATIONAL DEVELOPMENT).



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Wisconsin Family Business Forum
UW Oshkosh, College of Business
800 Algoma Blvd., Oshkosh, WI 54901

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