



News Briefs

July 2006

Welcome—
MCL Industries, Inc.



MCL Industries, Inc. is the newest member of the Forum. Founded in 1979, MCL has grown from the basement of Melvin and Mary Ann Treankler's home to a 60,000 square foot facility in Pulaski, employing 110 people.

MCL Industries is a solution-based manufacturer of electrical equipment for heavy duty on and off road vehicles and heavy duty equipment manufacturers. Their customers manufacture refuse, concrete placement, fire and military vehicles, power generation equipment and yachts.

MCL takes great pride in their support of the Pulaski community and of youth programs in particular.

The business is in its second generation of ownership. Melvin's sons, Carl and Larry, own the majority of the business with two non-family owners who are active in the business—Terry Hanstedt and Gary Lofquist.

The third generation has four college students who are/may be interested in joining the business. They are studying electrical engineering, finance and marketing. Gary says transition planning is a priority.

MCL was introduced to the Forum by Pathmakers, Inc., a Forum sponsor. Pathmakers will be MCL's buddy, helping them get acquainted with and involved in the Forum.

Please help us welcome MCL Industries.

10th Annual Dinner: Celebrating a Family's Heritage

Lou Gentine, chairman and CEO of Sargento Foods, Inc., Plymouth, spoke to 150 family business owners, sponsors and their families at our 10th anniversary dinner on May 24th. He talked about his family's business, its culture, and its planning for the next generation. Typical of successful family businesses, Sargento's philosophy, "Hire good people and treat them like family," resonated well with those gathered to celebrate their family businesses and the Forum's 10 years.

Gentine outlined his family's progression from first generation family management, to second generation professionalization of the business with the addition of outside directors on their board, to the Board's role in planning for the next generation of leadership.

As part of its 10th anniversary dinner, the Forum recognized eleven (11) charter organizations that have been critical to the growth and success of the Forum and that continue to participate:

Badger Mining Corporation, Berlin
Bassett Mechanical, Kaukauna
Carew Concrete & Supply Company, Inc., Appleton
Faulks Brothers Construction, Inc., Waupaca
Janesco (Oshkosh Marine Supply), Oshkosh
RB Royal Industries, Inc., Fond du Lac
U.S. Oil Company, Inc., Combined Locks
U.S. Paper Converters, Inc., Appleton
McCarty Law LLP, Kaukauna
Retained Earnings Company, Neenah

University of Wisconsin Oshkosh College of Business
Jim Neumann of RB Royal was inducted into the Forum's *Fellows Society* for his role in bringing non-family executives into the Forum, formulating the Executive Committee for the Forum's Board, and serving as the Board's first chairperson. Jim joined other Fellows in this prestigious society: Craig Smith, founder of Retained Earnings, Neenah and co-founder of the Forum, and Burk Tower, entrepreneurship professor in the College of Business, UW Oshkosh and co-founder of the Forum.

Five-year recognitions were also given to six (6) of the 38 family business members:

Kobussen Buses Ltd., Kaukauna
Matthews Tire & Auto Services Inc., Appleton
Morton Drug Company, Neenah
Sadoff & Rudoy Industries LLP, Fond du Lac
Van Zeeland Manufacturing, Inc., Little Chute
Zander Press Inc., Brillion



The Forum also expressed its appreciation to its sponsoring organizations: **First National Bank-Fox Valley**, Neenah, Menasha, Oshkosh, and Appleton; **McCarty Law LLP**, Kaukauna; **Retained Earnings Company**, Neenah; **Schenck Business Solutions**, Appleton; **Pathmakers, Inc.**, Oneida, the **College of Business**, UW Oshkosh and **The Business News** of Green Bay.

Forum Family Picnic

August 2, 2006, 5—8 pm
Plamann Park, Appleton

The Plamann Park Pavilion will be the site of the August picnic. It provides shelter from the sun and, if necessary, from the rain. Located adjacent to playground equipment, hiking path, ball diamonds, and the disc golf course, it is an ideal place for young and old alike to enjoy a summer evening.

The Forum will provide the basics: meat, buns, condiments, plastic and paper products. Program Committee members have agreed to host this event including cooking.

Forum members and sponsors are asked to provide the fun foods—snacks, side dishes, salads, and desserts keeping in mind the appetites of younger and older folks.

We hope you will all plan to spend a lazy evening with us at the picnic at Plamann Park.

Facilitation Training

August 22, 2006, 8 am—noon
Reeve Union, UW Oshkosh
Dale Feinauer, College of Business

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.

Members and sponsors are encouraged to send multiple people to this excellent training opportunity.

Communications, Collaboration & Teamwork

September 14, 2006, 8 am—noon
Butte des Morts Country Club
Sharon Krone, Family Business Consulting Group, Inc.

Families in business together are facing tough decisions every day that require thorough and complementary interpersonal skills. Communication skills are simply a necessity, yet, skills developed solely within an individual, may not be the final answer for a successful family business to navigate dicey questions.

In this workshop, presented by Sharon Krone of the Family Business Consulting Group, family business members have the opportunity to sharpen their *collective* skills and ability to communicate effectively with one another.

First Forum Scholarship Award

Melissa Schultz, a UW Oshkosh College of Business junior, was awarded the first Forum scholarship during the annual dinner program at Bridgewood Resort Hotel on May 24th.

As part of this award, Melissa is encouraged to participate in Forum events as her class schedule will allow.

The Forum recently received a thank you note from Melissa. She expressed her sincere thanks to the Forum for the generous award. She said that the dinner was a great networking opportunity for her.

We look forward to having Melissa participate with us in the coming year.

Peer Group Meetings

Next Generation Group:

On August 10th, the group is planning a summer get-away event in Algoma hosted by JAG Outdoor Advertising. The event will provide opportunities for visits to local family businesses, exploration of the JAG businesses, a fish boil, shopping, and salmon fishing. Overnight accommodations in the Algoma Beach Motel, one of the JAG properties, may be available if reserved quickly.

The group has invited the Successor group members to join them for this gathering. Those interested should contact Sue at the Forum office.

Successors Group:

On April 25th, the group talked with Linda Hartenian about developing a personal development plan for their individual and business needs.

Plans for the upcoming year are being developed and should be available in late summer.

Non-Family Group:

Although one of the newest peer groups, about a dozen non-family executives and managers are now members of this group's monthly meetings.

During the last several meetings, the group focused on leadership and career development for themselves, their successors, and the organization as a whole. The July meeting will be presented by Beth Nighbor and Tim Wuest of Badger Mining Corporation and will focus on their leadership development process and training.

Non-family executives and managers of member businesses who are interested in attending the meetings of this group should contact Sue at the Forum office.

Best Practices:

John Prophet and Todd Behm of Schenck Business Solutions presented a *Tax Update: Tax Incentives to Help You and Your Business* on May 11th at the Butte des Morts Country Club. The lunch meeting was hosted by Schenck for Forum members and sponsors.

John and Todd presented 15 issues that will effect business and individual tax planning. They provided opportunities for Q&A throughout. Participants commented that

the session was very informative and presented in a way that was very practical.

IT Group:

The Information Technology group met on June 6th, at Schenck Business Solutions in Appleton. Jim Tarala of Schenck provided a tour of their data center, gave an overview of their IT infrastructure, and led a discussion of document management, providing demonstrations of several products and a planning outline.

The group will meet again in late September. If you are interested in participating, contact Sue.

Member News

Badger Mining Corporation—Society for Human Resource Management’s *Great Place to Work* finalist

Bassett Mechanical— honored with a Silver Award in Quad/Graphics’ 2005 Supplier of the Year awards

JJ Keller—announced the appointment of Bob Keller to chairman/CEO; his brother Jim to president; and their father and the company founder, John J. to chairman emeritus effective July 1st

Marion Body Works—built an advanced truck body designed to house all the electronics and special equipment needed for an advanced weapon for ATK

RB Royal Industries—spoke to over 300 people, showcasing their *safety ownership* program at the spring Safety Congress

Director’s Column

Sue Schierstedt



After many months of recruiting, I am pleased to introduce the Forum’s new administrative assistant, Donna Nelson. For three years prior to joining the Forum, Donna worked for the Center for Community Partnerships (CCP), an outreach unit of UW Oshkosh. In her first role at CCP, she managed general administrative accounting. Her most recent responsibilities were the management of the large student internship program. Donna was credited with more than doubling that program in a two year period. Donna’s positive “can do” attitude is already showing fruits as she is learning very quickly. I hope you will take the opportunity to introduce yourself to Donna and to help make her feel at home.

Donna succeeded Mary Weddig in this role. Mary Weddig was with the Forum for a little over a year. She came to us out of retirement after years in IT work with Budget Rental Car. Mary decided that she really prefers retirement and tendered her resignation last November. She has been wonderful about staying with us - both physically and mentally - as we went through a tedious State search for her successor. We are very grateful to Mary for her enthusiastic commitment to the Forum family. Thank you, Mary!

New, easier to remember web address for the Forum—wbf.uwosh.edu.

Sue

| Wisconsin Family Business Forum Program Calendar | | |
|---|---|--|
| 2006 | | |
| Date | Event | Presenter(s) |
| Aug 2 | <i>Family Picnic</i> | Program Committee |
| Aug 22 | <i>Facilitation Training</i> | Dale Feinauer UW Oshkosh |
| Sep 14 | <i>Communication, Collaboration & Teamwork</i> | Sharon Krone Family Business Consulting Group, Inc. |
| Sep 26 | <i>Reception in Green Bay</i> | Pathmakers, Inc. |
| Oct 24 | <i>Leveraging Your Strengths as a Leader</i> | Amy Biersteker & Thom Cody Pathmakers, Inc. |
| Nov 30 | <i>Process Improvement Best Practices</i> | Schenck Business Solutions |
| Dec 5 | <i>Choosing & Using Advisors</i> | Moderated Panel of Owners and Advisors |
| 2007 | | |
| Jan 25 | <i>Gender Issues: Bringing Out the Best in Sons and Daughters</i> | Tom Jadin |
| Mar 14 | <i>Harnessing the Power of an Independent Board</i> | Norb Schwarz Family Business Consulting Group, Inc. |

Reciprocity program available to Forum members & sponsors:

| UW-Madison Family Business Center | | |
|--|--|--|
| 2006 | | |
| Oct 24 | <i>Effective Leadership in the Family Business</i> | Drew Mendoza Family Business Consulting Group, Inc. |

The Forum thanks the following sponsors for contributing significant value to keep the Forum at the forefront of family business 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 117th year of providing financial services to the people and businesses of the Fox Valley with locations in Appleton, Menasha, Neenah, and Oshkosh.



McCarty Law 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.



Pathmakers, Inc. has been serving family businesses since 1995. This partnership of four focuses on the incorporation of people, process, and plan into family businesses of all sizes. Their mission is to help leaders fully understand their personal impact on those around them in order to have the courage and faith to challenge their people and their organization for enduring success.

Retained Earnings
Company



Retained Earnings Company has been providing business owners and their employees with solutions to their insurance and investment needs for over 25 years. The Retained Earnings team brings expertise in the areas of financial, estate and business succession planning, 401k's, employee benefits, investments, life, health, disability, and long-term care insurances.



Schenk Business Solutions is a full-service regional accounting and consulting firm with nearly 600 employees, serving businesses and individual clients through its 11 Wisconsin locations. As one of the largest Wisconsin-based CPA firms in the state, Schenk Business Solutions provides a full range of services including tax, business consulting, information technology, retirement planning, and human resource solutions for today's business, government and personal challenges.



University of Wisconsin Oshkosh College of Business provides undergraduate and graduate education with a wide array of outreach services to benefit economic development in northeast Wisconsin. A key strength of the College is providing professional expertise through personal contact among students, faculty, and members of the community.

Associate Sponsor:



The Business News is a local business newspaper serving a 10-county area of northeast Wisconsin. It focuses coverage on the Northeast Wisconsin area that matters most to you and your customers.



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