



# News Briefs

July 2007

Combining the *Importance* of business with the *Complexity* of family

## Green Bay Chapter launch

July 27, 2007, 8:00—10:00 am  
Continental breakfast/registration—7:30 am  
Nsight Telservices, Green Bay

We are proud to announce the launch of this Chapter of the Forum in the Green Bay area. The Chapter will provide Green Bay area family business members opportunities to meet locally during the year on relevant issues, while participating in all the regular Forum events and benefiting from Forum resources.

This first meeting of the Green Bay Chapter will be hosted by Nsight Telservices and be presented by Green Bay family business members, sponsors, and Forum staff. It will include vignettes by family business owners, an exploration of family business basics, and roundtable discussions.

This meeting is open to all Green Bay area family business owners who would like to learn more about the Wisconsin Family Business Forum. Registrations can be made on our web site—<http://wbf.uwosh.edu> through the Registrations menu item, by e-mail - [nelsond@uwosh.edu](mailto:nelsond@uwosh.edu), or by calling (920) 424-1541. Registrations are due by July 23rd.

## Facilitation Training

August 15, 2007, 8:00 am—noon  
Continental breakfast/registration—7:30 am  
Regency Center, Green Bay  
Presenter : Dale Feinauer

The Forum is extremely pleased to announce that **Dale Feinauer** has agreed to lead the Forum's Facilitation Training workshop for a fifth year. Each time Dale has led this workshop, members and sponsors have indicated that the skills and techniques learned make this a very well-spent half-day and are highly transferable to their work situations.

As a facilitator for many national groups,



Dale brings valuable experiences from applying this art to a wide variety of groups and situations. Dale demonstrates the strategy and tools of facilitation while providing tricks of the trade.

Members and sponsors are encouraged to register any of their people who are expected to facilitate project teams and/or meetings. Registrations should be made on our web site no later than August 9.

## Plan Now to Avoid Crisis Clean-Up Later

September 11, 2007, 8:00 am—noon  
Continental breakfast/registration—7:30 am  
Butte des Morts Country Club, Appleton  
Bonnie Brown Hartley, Transition Dynamics, Inc.

We have invited Bonnie Brown Hartley to return to the Forum for an update on her program, *Practice Dying Until You Get It Right*. Those of us who remember that program, decided we were long-overdue for revisiting the issues and the planning strategies Bonnie presents.



Designed for owners, executives, and managers, this workshop provides family business “fire drills” during which participants are challenged to develop contingency plans to address the unexpected. Bonnie has demonstrated that by “learning to use a model for managing unexpected change, you support your family’s and your business’s abilities to respond quickly and effectively to unexpected change.” Bonnie says, “These fire drills will help you build analytical skills and contingency action plans as well as emotional strength.”

In addition to presenting this workshop, Bonnie is a recognized author about family business issues, serves on the Boards of AFHE (Attorneys for Family-Held Enterprise), and has international clientele. Forum members may recall that she also co-authored *The Succession Survival Kit* which we have used since 1996.

Registration can be made on our web site after July 20.

## The Kohler Family Heritage

Sunday, May 4, 2008  
5:00—8:30 pm  
Herbert Kohler, Chairman/CEO/President  
The American Club, Kohler

**Plan ahead!** Based on the enthusiastic response from members and sponsors, we have scheduled our 12th annual dinner for Sunday, May 4, 2008, at The American Club in Kohler. We received overwhelming agreement that hearing Herbert Kohler talk about the challenges and successes of his family at The American Club was a unique opportunity.

For those who choose to make this a relaxing family weekend in Kohler, there will be opportunities to tour the Kohler Design Center, golf, and/or participate in one of their famous culinary events.

The American Club is providing special lodging pricing for our group and is holding a block of rooms for the event. Kohler is also offering excellent golf prices for both the Irish Course at their Whistling Straits course and the Meadow Valley Course at Blackwolf Run.

To ensure that we get our guaranteed number of reservations for the dinner and lodging and that you get the best possible rates, we are asking you to **plan ahead!** Please discuss this event with your family and associates and make your reservations as early as possible. Dinner reservations should be made through the Forum website. Lodging reservations will be made directly with The American Club. You will be receiving more detailed information in the near future.

## Family Picnic

June 21, 2007  
Plamann Park, Appleton

It was very enjoyable to picnic with Forum families in the relaxing atmosphere of the Plamann Park Pavilion. We always enjoy getting to know spouses and children of Forum members and sponsors.

The young children made good use of the park's playground which is located immediately next to the Pavilion.

There was disc golf for the aficionados of that sport. And, of course, as with every good picnic, we had lots of good, summer food.

Families brought delicious dishes to share. Our official cooks, Dan Meyer and Burk Tower, cooked up tasty hot dogs, burgers, and brats. And, there was a good supply of cold drinks.



If you couldn't join us this year, we hope you will plan to do so next year. It's a great way to get to know members and sponsors better and to meet their families.

## Peer Groups

### Generation Now group

On May 16, **Mark Lasky** hosted the group at Sadoff & Rudoy Industries in Fond du Lac. Mark provided an overview of his family's business and their recent experiences related to this session's topic. **Kurt Wanless** of McCarty Law and **Steve Predayna** of Schenck Business Solutions participated in an active discussion on the topic: "how and when to sell a business unit." The group also did some planning for next year, identifying meeting topics and agreeing upon meeting dates and times. Based upon the group's plans, Dale Feinauer, the group facilitator, will work on developing the year's agenda and securing presenters, as appropriate. The group will continue to hold meetings on the 3rd Wednesday of each month, September through May.

### The next generation group

This group will reconvene in fall. Any next generation family member of the Forum who is interested in participating in this group, should contact Sue for more information.

### Non-Family group

There is rarely a lack of energy or discussion topics when this group of non-family executives meets. This was certainly true at their last meeting on May 24. In addition to a lively discussion, the members identified topics for next year's meetings; established meeting format, dates and times; and determined the first fall meeting.

For their first meeting in fall, September 25, 2007, **Matt Wirth** of Buechel Stone Corporation will facilitate the session which will focus on **health care costs—self-funding, HRAs, HSAs, etc.**

Non-family executives of member organizations interested in participating in this group should call Sue.

### IT group

This group, composed of various information technology/information system professionals is scheduled to meet on July 17 on the campus of UW Oshkosh. For meeting details, contact the Forum office.

## Member News

**New Tech Metals** of New Franken received their ISO 9001, 2000 certification on April 27. Congratulations!

**JAG Outdoor Advertising's Jane Sweasy** and **Fond du Lac Bumper Exchange's David Gneiser** are featured in the Summer issue of *Family Business Magazine*, pages 71 and 72. They were interviewed about how their family businesses play a role in the community. Good job Jane and David.

On June 13, 2007, **J.J. Keller & Associates, Inc.'s** founder, **John (Jack) Keller**, died peacefully at home. The Forum expresses its condolences to the entire Keller family.

## Reciprocity Agreement

The Forum has renewed its program reciprocity agreement with the Family Business Center (FBC) at UW-Madison. This agreement provides members of both organizations the opportunity to attend programs statewide as part of their membership benefits. A nominal participation fee has been agreed upon to cover materials, meals, and other direct program costs.

Members wishing to attend a FBC program in Madison must make a reservation with that organization in accordance with their reservation policy. Note that due to capacity issues, FBC is offering the *same* program on two dates in October. Reservations can be made on-line at the FBC web site for the date of your choice. The Forum's web site has a direct link to their programs.

All who reserve a seat will receive a normal reservation confirmation, map and parking information. Members must pay for the program upon arriving at the program site. Attendance is limited to family business members.

As part of this agreement, the Forum lists FBC programs, as space allows, along with the Forum's on page 3 of *the News Briefs*. We encourage members to take advantage of these opportunities whenever possible.

## Director's Column

Susan Schierstedt



It is with considerable regret that I say "good-bye" to McCarty Law LLP as the Forum's law sponsor. In accordance with the Forum's Bylaws, which McCarty helped formulate, McCarty notified the Forum of their intent to end their sponsorship effective June 30, 2007, encouraging the Forum to get another law firm's support and perspective.

For eleven (11) years, McCarty has been the Forum's law firm sponsor. Their attorneys have provided programs, professional advice, leadership, and friendship to the Forum. They will be missed!

Beginning in 1994/95, McCarty attorneys, **John Peeters** and **John Russo**, began working with Craig Smith of Retained Earnings and Burk Tower of the College to conceptualize and form a family business resource for northeast Wisconsin. Ever since that time, McCarty has been an active participant in the Forum providing significant time, expertise, and financial support.

Thank you to **Scott Barr**, **Becky Kent**, **Jennifer Koepl**, **Jennifer Olson**, **Kurt Wanless**, **John Russo**, **Kurt Wanless**, and **Reg Wydeven**.

Since January, the Forum's Recruitment & Retention Committee members have been focused on recruiting another law firm to fill the legal expertise void. That effort is continuing. As soon as a new firm is secured, notification will be sent to the membership.

## Wisconsin Family Business Forum Program Calendar

### 2007

Date	Event	Presenter(s)
Aug 15 8—noon; 7:30 am break-	<i>Facilitation Training</i>	Dale Feinauer College of Business
Sept 11 8—noon; 7:30 am break-	<i>Plan Now to Avoid Crisis Clean-Up Later</i>	Bonnie Brown Hartley
Oct 18 8—noon; 7:30 am breakfast	<i>Surviving the Family Business Whitewater</i>	Don Jonovic Family Business Management Services
Dec 4 1-4pm; 4 pm—holiday reception	<i>Selling the Family Business: the decision, the process, the after life</i>	Jim Hayes, et. al.

### 2008

Jan 22 1-4 pm	<i>Mentoring and Coaching the Successor</i>	Vince Gallucci & Kim Bassett-Heitzmann
Mar 5 8—noon; 7:30 am breakfast	<i>The Next Generation—the 8 Biggest Challenges</i>	Greg McCann McCann & Associates
May 4 5:00—8:30pm	<i>12th Annual Dinner</i>	Herbert Kohler Kohler Company

## UW-Madison Family Business Center

### 2007

Sept 11 7-11:30 a.m.	<i>Ethics: The Heart of a Family Business - An Interactive Forum</i>	Denis Collins Edgewood College
Oct 1 1-4:30 p.m. or Oct 2 7-11:30 a.m.	<i>Excellence in Family Governance</i>	Cindy Iannarelli

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