



# News Briefs

## July 2008

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

### New Member

**McClone Insurance Group** is the newest member of the Forum. The business has eleven (11) family members, representing the second and third generations, employed in the business. The second generation leaders include Mike McClone, President/CEO, and his brothers - Dan, Pat, and Brian.



McClone is a full service insurance agency providing business and personal insurance, employee benefits and financial planning. They have offices in Menasha, Oshkosh, Fond du Lac, and Milwaukee. Get acquainted with McClone Insurance Group at <http://www.mcclone.com>.

Jason Lasky of Sadoff & Rudoy Industries has agreed to be McClone's member buddy, helping them get acquainted with the Forum, and its members and sponsors. We look forward to introducing the McClone family at our September 16 program and to having McClone's participation in programs and peer groups.

### Two New Sponsors

**Godfrey & Kahn s.c.**, attorneys at law, became a Forum sponsor in April, filling a void in the legal area. The firm has over 190 attorneys in five Wisconsin offices—Green Bay, Appleton, Milwaukee, Madison and Waukesha, an office in Washington D.C., and an office in Shanghai.



Godfrey & Kahn's practice encompasses business, employment, estate and trust services, as well as industry specific, technology, and intellectual property services.

Al Hartman of the College of Business is Godfrey & Kahn's sponsor buddy, helping them to understand the sponsor role, and introducing them to members and sponsors.

Attorneys Tim McCoy, Tim Feldhausen and Laura Henderson joined us at the annual dinner. We will officially introduce the firm at our September program.

**Davis & Kuelthau, s.c.**, attorneys at law, became a Forum sponsor in early May. The firm is a full service law firm with more than 75 attorneys located in six Wisconsin offices—Green Bay, Oshkosh, Sheboygan, Madison, Brookfield and Milwaukee.



The firm offers an array of legal services to Wisconsin-based corporate, public, private and individual clients that range from small, mid-sized institutions to large municipalities. Eight of their attorneys were named "Best Lawyers in America for 2008."

Shareholders—Tony Renning, Adrian Ulatowski, and Tom Cisler, along with Michelle MacGrath, Director of Marketing, expect to participate in the Forum.

Jim Stahl, a shareholder with Schenck Business Solution and our incoming Chairman of the Board, is Davis & Kuelthau's sponsor buddy. Jim will help orient the firm's attorneys to sponsorship, and the Forum's programs and members.

We will officially introduce the firm at the September program.

### Summer Fun—a Family Affair!

Wednesday, July 16, 2008  
6:15—9:00 pm  
Fox Cities Stadium, Appleton

Bring the children, the grandparents, and associates, and join your Forum friends for a good, old-fashioned night of baseball with the Wisconsin Timber Rattlers. The Timber Rattlers will play South Bend in a 7:05 pm game.



The Forum has reserved seating on the Miller High Life Home Run Porch, a two-tiered deck located just past the right field wall that offers fans a spectacular view of the field and is a great place to have a picnic. Supper will be served on the porch during the game. The porch provides room for children to be active during the game.

As an extra bonus, one of our group will also throw out

the first pitch.

We will begin distributing tickets at the entrance to the stadium at 6:10 pm. All tickets will be purchased in advance as a group. So, contact Donna if you haven't already reserved seats for the game.

If the game is rained out, you will be given a voucher at the stadium for a future game of your choice.

Let's go out to the ballgame!

## Facilitation Training Workshop

Wednesday, August 13, 2008

8:00 am—noon

Reeve Union, UW Oshkosh

Dale Feinauer, College of Business

Summer is already here and, as impossible as it sounds, August is just around the corner. That means it is time for members and sponsors to register for this workshop.

Dale Feinauer, professor of human resource management and nationally recognized facilitator of business, public sector, and association meetings, has again agreed to provide this awesome learning experience for the Forum.



Bring all associates who would benefit from learning skills and techniques that are applicable to business, community, and volunteer venues as well as the Forum's programs and small group meetings. Quality facilitation ensures productive meetings, assisting groups in the discussion of key issues, and increasing the value of their discussions and problem solving.

### Who will benefit from attending

- Owners, managers, team leaders, project managers, etc.
- Anyone whose position requires them to manage a group decision making process, stimulate creativity, initiate change, etc.
- Novices as well as experienced facilitators will benefit from participating.

### Program Objectives

As a result of this program, participants should...

- understand the role of a facilitator.
- understand the difference between a facilitator and a leader or content expert.
- demonstrate effective facilitation skills, including
  - plan and facilitate successful discussions.
  - increase participation and input from members.
  - keep the activity on track and productive.
- understand the unique dynamics of Forum discussions and practice appropriate techniques.

Register yourself and others from your business through the web site registration form for the event—<http://wfbf.uwosh.edu> at the Programs/Registrations menu option. Registrations are due by August 7.

## The Importance of Vision & Mission in Family Business Success

Tuesday, September 16, 2008

8 am—noon

preceded by 7:30 am registration & breakfast

Bridgewood Resort Hotel, Neenah

Howdy Holmes, Chelsea Milling Company

After successfully competing in the world of motor sports for 20 years, Howdy Holmes, president/CEO of Chelsea Milling Co., returned to the family business in November of 1987.



As a racecar driver, he won championships, started a motorsports marketing company and an advertising company, authored an award-winning book, and was contributing writer for magazines and newspapers about racing.

Upon returning to "JIFFY" in 1987, Mr. Holmes led a transformation of the then 100 year old family business. With the help of others, a professionally managed strategic vision was successfully introduced.

Today, known for their Quality and Value, "JIFFY"

Mixes is uniquely positioned for the 21<sup>st</sup> Century.

"JIFFY" is the market-share leader in retail prepared baking mixes. Chelsea Milling is a privately held family-owned business.

Plan to attend on September 16 to hear Howdy Holmes talk about his family business and its success. Registration for this program is due by September 10.

## 12<sup>th</sup> Annual Dinner

On Sunday, May 4<sup>th</sup>, 118 of our closest friends—members and sponsor, enjoyed a great dinner at the American Club in Kohler, followed by a presentation by Herbert V. Kohler about his family and their challenges and successes.

This year's annual dinner was really an event. For many of us, it began with lodging at the American Club or the Inn at Woodlake, shopping, and a culinary event on Sunday afternoon. The culinary event was presented by the American Club's head banquet chef who provided us with techniques and recipes for creating excellent hors d'oeuvres. Our taste tests gave him high marks.

Sunday evening included a fabulous dinner, Mr. Kohler's presentation, and our first Silent Auction. The Silent Auction, planned and orchestrated by Diane Roundy and her subcommittee members—Amy Biersteker, Dan Kobussen, and Darcy Zander-Feinauer, generated over \$5,000 for the Forum's Scholarship Endowment Fund and a great deal of fun for our dinner guests.

For those who stayed until Monday, the event concluded with a tour of the Kohler Design Center and the Kohler Company plants located in Kohler.

Participant evaluations gave the event high marks and provided suggestions for speakers, sites, and formats for

next year.

The audio of Mr. Kohler's presentation is available to members and sponsors in the "Members Only" section of our web site.

## Sponsor News

Thom Cody of Pathmakers, Inc., a Forum sponsor, recently participated in the Fortune Small Business Magazine's *Small Business Makeover*. The makeover focused on a Green Bay area business. Watch the website for details: <http://money.cnn.com/magazines/fsb/fsbmakeover/>.



The Forum was contacted by Fortune Small Business Magazine to help them identify experts to be a part of this makeover. Upon our recommendation, we were proud to have Pathmakers chosen as one of the experts. Congratulations!

## Peer/Affinity Group Calendar

Just a reminder that the Forum's affinity/peer groups – Senior Executives, Next Generation, Successors, Non-Family Executives, Couples, and Information Technology – meet for the express purpose of developing long-term trusting relationships for problem solving, and personal and professional growth.

Members interested in participating in a peer group beginning in the fall are asked to contact Sue now.

## Director's Column

Susan Schierstedt



As we begin the Forum's 13th year of operation, I want to reflect upon one of the huge benefits the Forum provides. That is the many and varied opportunities we have to connect with one another. Most of us consider the Forum our family in a unique way.

As program guests depart from their one-time guest exposure to us, they often express this uniqueness in the following way, "I came to sit quietly and observe the Forum; but I ended up feeling a part of the group and talking openly with people who truly understood my situation, listened, and provided great ideas."

It is my hope, and that of the Board, that you will share this organization, this unique community of family businesses, with other businesses that would benefit from participation. Will you make a commitment to bringing a different family business guest to each program this year?

Donna and I will support you in this effort so let us know how we can help you—materials, program invitations, etc.

The Forum's web site is built to serve our membership. I hope you all know about the program information and registration forms, the member and sponsor contact infor-

mation and links, the family business resource links, the program audios, and the library resources listing. I have recently added [Google maps showing member and sponsor locations](#). You can use these maps for travel directions. They also show how geographically extensive the Forum footprint is.

Another addition to our web site is the [family business poll](#) on our home page. Each poll will be on the site for one month. Take the poll. You will be able to view the results during that period and see how you compare to other family businesses.

I hope you take time to relax and enjoy the summer! Stay safe and in touch.

*Sue*

## Program Opportunities

The Forum and the Family Business Center (FBC) at UW-Madison have a reciprocity agreement that allows Forum members to attend FBC programs for a minimal per person cost. FBC programs are listed in our program calendar in each issue of the *News Briefs*. To register for their programs, follow the Alliance link on our web site to the FBC's site and programs.

Program Calendar—2008		
Wisconsin Family Business Forum		
Date	Event	Presenter(s)
July 16	<i>Timber Rattlers Game</i>	Program Committee
Aug 13	<i>Facilitation Training</i>	Dale Feinauer
Sep 16	<i>The Importance of Vision &amp; Mission for Family Business Success</i>	Howdy Holmes Chelsea Milling Co.
Oct 21	<i>What's So Bad about Feeling Good?</i>	Tom Jadin
Dec 4	<i>It's a Wonderful Life: Family in Business Together</i>	Thom Cody Pathmakers, Inc.
2009		
Jan 28	<i>Perils of Pauline</i>	Eclectic Arts Ensemble
UW-Madison Family Business Center		
2008		
Sep 16	<i>Negotiating Conflict in the Workplace</i>	Ralph Cagle
Nov 4	<i>Family Enterprise Continuity</i>	James Hughes
Dec 9	<i>Socratic Leadership for the Family Business</i>	Amy Hutchens

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



**Davis & Kuelthau, s.c.** is a full-service law firm with more than 75 attorneys practicing from offices across Wisconsin. The firm offers an array of legal services to Wisconsin-based corporate, public, private, and individual clients that range from small, mid-sized institutions to large municipalities.



**First National Bank — Fox Valley** has a competitive advantage of developing strong, close customer relationships, especially in the niche of family-owned businesses. Established in 1887, First National Bank—Fox Valley provides financial services to the people and businesses of the Fox Valley with locations in Appleton, Menasha, Neenah, and Oshkosh.



**Godfrey & Kahn S.C.** serves clients by first seeking to understand their business, their goals and their specific needs, whether in Wisconsin, across the United States or abroad. Each day, more than 190 highly skilled Godfrey & Kahn attorneys use this knowledge to pursue their clients' best interests. The goal is to capture the client's vision for the future and make it a reality by providing sound legal counsel and innovative solutions. Here, the client always comes first. They measure their success by their client's success.



**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.



**Schenck 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, Schenck 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.



**The Business Bank** was formed in 1999 to provide banking services to locally owned and operated businesses. The focus on business banking provides the highest level of service in the market. The Business Bank's low client to employee ratio enables unmatched, personalized, responsive, and efficient service.

THE BUSINESS NEWS

**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.



**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.



**Wipfli LLP** is a full-service CPA and business consulting firm. Wipfli advises family businesses in all areas, from finance and operations to human resources, information technology, and customer relationships. Wipfli's 75-year legacy of helping its clients succeed is a point of pride for each of the firm's partners and associates.



Vol. 12, No. 1 News Briefs © 2008  
Published six times a year  
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