



News Briefs

An Outreach Center of the UW Oshkosh College of Business

Facilitation Training

August 22, 2012, 8:00—11:00 am
7:30 am — registration, breakfast & networking
Sage Hall 2239, UW Oshkosh
Dale Feinauer, Facilitation Trainer

The purpose of facilitation training is to provide members and sponsors with skills and techniques that are applicable to the Forum's programs and small group meetings as well as to business, community, and volunteer venues. Quality facilitation assists groups in the discussion of key issues and increases the value of their discussions and problem solving.

Learning Objectives:

- Following this program, participants should gain insight into:
- ✓ Understanding the role of a facilitator
 - ✓ Understanding the difference between a facilitator and a leader or content expert
 - ✓ Demonstrating effective facilitation skills, including
 - ✓ Planning and facilitating successful discussions
 - ✓ Increasing participation and input from members
 - ✓ Keeping the activity on track and productive
 - ✓ Understanding the unique dynamics of Forum discussions and practice appropriate techniques

Every business can benefit from executives, managers, and supervisors who improve the quality of their meetings and project teams.

Members and sponsors are encouraged to register their employees whose leadership could benefit from acquiring and/or improving their facilitation skills.

For those of you who have taken this training should consider sitting through the session again as a refresher. It's a great opportunity to brush up on or refresh skills that have been forgotten.

Registration is required and can be made via the web at http://wfbf.uwosh.edu/Assets/programs_registration.php or by contacting Donna Nelson at 920-424-1541, nelsond@uwosh.edu.

Facilitation

- ✓ *An activity which makes tasks for others easy.*
- ✓ *The process that ensures the designing and running of successful meetings.*

Facilitator — one whose role it is to work with group processes to ensure meetings run well and achieve

Social Media & Issues in the Workplace

September 18, 2012, 8:00 am—Noon
7:30 am — registration, breakfast & networking
Butte des Morts Country Club, Appleton
Ragan Cheney, Associated Financial Group

Over the past twenty years advances in technology from email, the internet and remote access to laptops and smart phones have enabled organizations to be more efficient and profitable. However, while many organizations have reaped the rewards from these advances in technology, they have also failed to prepare properly for the risks these very advances have brought into their organizations. This program is designed to assist employers in identifying the obvious and latent risks associated with technology. We will also discuss both the legal and practical issues associated with employees use of social networking websites and other electronic mediums such as cell phones, iPods, and MP3 players in the workplace.

You will benefit most by bringing multiple family members and appropriate non-family leaders to this workshop.

Registration is required and can be made on our site at <http://wfbf.uwosh.edu> and choose the Programs/Registrations menu option. Or email Donna Nelson at nelsond@uwosh.edu.



Family Business Education (FBE) Certificate Program

FBE is designed to provide the basics of family business ownership, leadership, and family dynamics primarily to next generation family members. However, satisfied participants have also included current generation leaders and family business professional advisors.

This year's FBE Certificate Program starts in October and will include:

October 10, 2012 - Defining the Family Business

How family systems dynamics impact governance,

legal, accounting, wealth management and human resources management perspectives

November 14, 2012 - Family Business Governance

Options for management of family business – a variety of human resource and general management topics are covered

December 12, 2012 - Strategic Planning in a Family Business

How to engage in strategic planning for both the family and the business, and how to merge these often competing plans

January 9, 2013 - Business Management

Options for compensation, promotion and other human resource issues in a family business

February 13, 2013 - Evolving Ownership in the Family Business

How to manage succession planning and the evolution of ownership in a family business

March 13, 2013 – Evolving Leadership in the Family Business

How to maximize the benefits of, and overcome the limitations of, being “the next generation” of a family business; How to manage the often critical role of non-family member in the leadership of a family business

April 10, 2013 – Managing Culture, Change and Conflict

How to manage these critical dimensions in a family business

The knowledge and understanding gained through participation in FBE is designed to prepare individuals for leadership and ownership roles in their businesses and for strengthened planning and communication in their families and businesses.

If you are interested in learning more about this program, please contact Donna Nelson via email at nelsond@uwosh.edu, via phone (920) 424-1541 or for more information visit <http://wfbf.uwosh.edu/Assets/basics.php>.

The registration deadline for this year’s class is October 1, 2012. To take advantage of the **early-bird discount**, registration must be made no later than September 1, 2012.

Peer/Affinity Groups—

One of the benefits of the Forum that members mention often is the opportunity to talk with other family businesses about an issue and hear how others have handled it in the “real” world of family business. We have heard owners say, “We didn’t realize that others had faced this and that there are a number of ways to handle it. We don’t have to reinvent the wheel or to feel that we are alone with this issue.” Another benefit is to learn from a subject expert/advisor alongside those peers where there are opportunities to explore the topic in more depth.

The Forum’s peer groups provide a small group environment with consistent membership, trust and confidentiality. Groups like the Senior Executives and the Generation Now peer groups are composed of individual family

members who hold similar roles in their businesses.

Those who participate in the Non-Family Executives’ peer group share similar roles and perspectives. They hear from advisors and discuss predictable issues facing families that own businesses and how they, as non-family executives, can play an effective role.

In addition to the peer groups, the Forum also hosts affinity groups such as the Green Bay Chapter. This is a cross-generational group composed of members, non-family executives, and advisors—all of whom are part of the Forum’s membership. The composition of this group frequently varies depending on the meeting topic. As with all the groups, topics are chosen by the group’s members.

All members and sponsors who are interested in learning more about peer/affinity group participation are encouraged to contact Donna Nelson, nelsond@uwosh.edu and 920-424-1541, for more information.

Member Recruitment

Members and sponsors who successfully recruit a family business to the Forum will benefit by receiving a credit off their next year’s membership dues. 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.

Member and Sponsor information packets are available through the Forum’s office in hard copy or in electronic format. Call or email:

Cathy at 920-424-2257 or huybersc@uwosh.edu or Donna at 920-424-1541 or nelsond@uwosh.edu to learn how to receive a packet.

Idea for your website: In your signature, indicate you are a proud member of the Forum and link to the Forum’s website. For example:

Proud Member of The WI Family Business Forum



Website: <http://wfbf.uwosh.edu>

New Peer Group Options

There has been interest from some of our members regarding the creation of a couple new peer groups. One group would be an Operations Managers’ group and another would be a Mentor Program. The latter is a relatively new concept and not yet designed, however, an option I would like to pursue. If you, or someone in your company has an interest in being a part of either the Operations Manager peer group or the Mentor Program, please contact Cathy Huybers by phone 920-424-2257 or email huybersc@uwosh.edu.

2012 Forum Fellows

This year we welcomed two members to the honorary list of Forum Fellows. Those two people were Jane Sweasy, President of JAG Outdoor Advertising and Joe Kobussen., President of Kobussen Buses Ltd.

Jane currently serves on the Forum's Board of Directors, is part of the Gen Now and Green Bay Chapter peer groups, and serves as a buddy for new members. Her family business joined the Forum in January of 2002.

Joe served on the forum's Board of Directors from 2004-2010, is a member of the Gen Now peer group, and served on the R&R committee. His family business joined the Forum in December of 2000.

Our Forum Fellows to date are:

- 2004 - Craig Smith
- 2005 - C. Burk Tower
- 2006 - Jim Neumann
- 2007 - E. Alan Hartman & John Peeters (1948-2006)
- 2008 - Sue Schierstedt
- 2009 - Jim & Cindy Janes
- 2010 - Bill Bassett & Kim Bassett-Heitzmann
- 2011 - Tim & Vicky Wuest
- 2012 - Jane Sweasy & Joe Kobussen

5&10 Year Memberships

5 Year Memberships:

N.E.W. Plastics Corp.
New Tech Metals, Inc.

10 Year Memberships:

Fond du Lac Bumper & Exchange, Inc.
JAG Outdoor Advertising, Inc.
J.J. Keller & Associates, Inc.

2012-2013 Board of Directors

Deb Allison-Aasby, Principle Financial Group*
Nicole Bahn, 1st National Bank NA*
Deanne Bremer, Badger Mining Corporation
David Gneiser, Fond du Lac Bumper Exchange, Inc.
Phil Janes, Janesco, Inc.*
Ann Lahde, Schenck SC
Mandi McConnell, FLASH, Inc.
Jerome Ramus, Associated Bank NA*
Tony Renning, Davis & Kuelthau, SC
Jim Simpson, Marion Body Works, Inc.
Jane Sweasy, JAG Outdoor Advertising
Bill Tallon, UW Oshkosh

*Indicates Executive Committee seat

Member Announcement

Wisconsin employer Receives Platinum Well Workplace Award!

The Wellness Council of America (WELCOA), with local affiliate Wellness Council of Wisconsin, recently presented its coveted Platinum Well Workplace Award to Badger Mining Corporation. Badger Mining Corporation is only the third Wisconsin employer to receive a Platinum Well Workplace Award.



The Platinum Well Workplace Award represents the pinnacle of results-oriented worksite wellness programming. The Platinum Award is granted to organizations forging new ground by linking health promotion objectives to business outcomes. Join me in congratulating Badger Mining Corporation for the efforts they put forth to receive this coveted award.

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 estate planning essentials, creating a strategy to achieve success, dealing with difficult employees and generation dynamics & family business life cycle. Recordings of those previous programs are available for you in the *Members Only* section of the Forum's web site.

Director's Report

As we wrap up fiscal year 2012, there is opportunity to reflect. We had some great programs with superb member/sponsor evaluations. We had met several new people who expressed an interest in the Forum. We had reevaluated the frequency of some of our events and made changes. The Forum office moved into a new building that brought with it some new adjustments. All in all, it was another great year.

Looking forward, we have recruited for new and exciting speakers to provide the best information you all want. We have a great program lineup that is sure to provide great value to each of you. We also have our Family Business Education series starting this fall, allowing a new group to take advantage of the incredible information that is available.

With new board members, fresh faces on the R&R Committee, prospective peer groups on the horizon, great programs, it's going to be a great year.



Cathy

Program Calendar

Wisconsin Family Business Forum

<u>Date</u>	<u>Event</u>	<u>Presenter(s)</u>
August 22, 2012 8:00 am—11:00 am 7:30 am registration	<i>Facilitation Training</i>	Dale Feinauer Sage Hall, UW Oshkosh
September 18 2012 8:00—noon 7:30 am registration	<i>Social Media & Issues in the Workplace</i>	Ragan Cheney, Associated Financial Group with Panel of Subject Matter Experts Butte des Morts Country Club, Appleton
October 25, 2012 8:00 am—noon 7:30 am registration	<i>Going Behind the Curtain of Family Business Transition</i>	Kathy Wiseman, Working Systems, Inc. Bridgewood Resort Hotel, Neenah

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

Family Business Center at UW-Madison

November 8, 2012 3:00-6:00 pm Fall Social 6:00-8:00 pm	<i>What Happened to the Middle?</i>	Larry LoRocco, LaRocco & Associates, Inc. Scott Klug, Folley & Lardner
December 11, 2012 8:30—11:30 am	<i>Passing the Baby-The Eight Must-Haves of Successful Succession Planning</i>	Dana Telford, Family Business Consulting Group

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 Donna or Cathy.

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



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