



News Briefs

May 2008

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

New Member

Founded in 1983 by Joan Schaupp, P & S Investment Company, Inc. of Green Bay is the holding company for six major transport operating companies.



Joan's father, Joe Pomprowitz founded a small trucking business in the rural farming community of Sobieski, Wisconsin. The business named, LCL Transit for its "less than a car load" beginnings, grew rapidly. Joe and his wife, Helen, managed the company together for more than 30 years, eventually joined by their daughter Joan.

In 1966, leadership passed to the second generation when Joan's husband Bob Schaupp was elected chairman of the board.

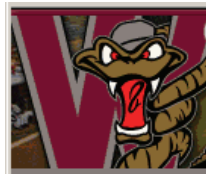
Under the Schaupps' direction, LCL Transport became one of six major operating companies under P & S Investment Company, Inc. The companies specialize exclusively in liquid edible food products, and together they make P & S Investment Company the largest chocolate hauler in the nation.

Today, LCL Bulk Transport is led by Hans Schaupp, a third generation of the Pomprowitz family.

contribution to and benefit from the Forum as invaluable. "Gaining insight from companies and individuals involved will help us expand our knowledge and understanding of family business perspectives."

Summer Fun!

Wednesday, July 16, 2008
5:30—9:00 pm
Fox Cities Stadium, Appleton



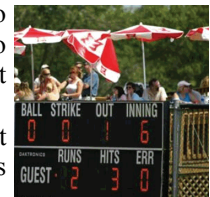
Getting together during the summer with both young and old to enjoy an old-fashioned baseball game with the

Wisconsin Timber Rattlers is scheduled for July 16 at Time Warner Cable Field at the Fox Cities Stadium in Appleton. The Timber Rattlers will play South Bend in a 7:05 pm game.

The Forum's pre-game dinner will be 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. We will watch the game, eat, and socialize right from the Porch! Maybe even catch a home run ball!

There will be room for the children to play. And, one of our group may also be the lucky one to throw out the first ball.

Plan to enjoy the summer sun and get better acquainted with Forum families at the game. Be sure to register yourself and your guests on the web site.



New Sponsor

WIPFLI

Wipfli LLP, a full-service CPAs and Consultants CPA and business consulting firm, locally located in Green Bay and the Fox Cities, is now a Forum sponsor. Wipfli advises family and closely-held businesses in all areas, from finance and operations to human resources, information technology, and customer relationships. Wipfli clients include manufacturers, health care organizations, financial institutions, nonprofit entities, dealerships, contractors and developers, small businesses, and individuals. Wipfli's 75-year legacy of helping clients succeed is a point of pride for each of the firm's partners and associates.

Wipfli sees the Wisconsin Family Business Forum as an excellent fit by reason of its focus on family business issues and opportunities. As a major segment of Wipfli's client base is "of the family business culture," it sees its

Facilitation Training Workshop

Wednesday, August 13, 2008
8:00 am—noon

Members and sponsors have an awesome opportunity to learn highly relevant facilitation skills from Dale Feinauer during this workshop. Bring all associates who would benefit from learning skills and tech-

niques 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.

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 who want a refresher.

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.

Member News

Congratulations to the three Forum members that were New North finalists for the Manufacturer of the Year Award:

MCL Industries, Inc. of Pulaski in the medium-sized business category, **Bassett Mechanical** of Kaukauna in the large business category, and **J. J. Keller & Associates, Inc.** of Neenah in the mega-sized business category.

Bassett Mechanical received the large company grand award.

J. J. Keller & Associates, Inc. received special award recognition for its commitment to strengthening communities.

Bahcall Rubber Company of Kaukauna, a fourth generation business, celebrated its 25th anniversary this year and completed a 15, 000 square foot addition.

J. J. Keller & Associates, Inc. and **U. S. Oil Company, Inc.** established a landmark charitable fund to address the root causes of poverty, helping local residents struggling to secure basic life needs such as food, housing, and health care. The fund was seeded with more than \$1.1 million, and will begin dispersing grants in 2008.

Marion Body Works, Inc. received a special recognition award from Spartan Motors for their efforts in providing information and support in the creation of Spartan's first on-line catalog.

Items for this section of the newsletter should be sent to Sue. Items are published on a space available basis.

Peer/Affinity Group Calendar

<u>Group</u>	<u>Meeting Dates</u>
Couples	TBD
Generation Now	May 21
Green Bay Chapter	June 13
Information Technology	TBD
Non-Family Executives	May 22
POPs	May 20
Senior Executives	June 5 August 20 October 16 December 2

Couples

This group is composed of member businesses in which no future generation is apparent. The group members focus on the unique challenges they face as couples operating successful businesses and on succession planning issues. Merry Whipple and Gail Ann Winkler coordinate the group's meetings.

Generation Now

This group is composed of business leaders who focus on topics and issues of relevance for their individual and business needs. The group is facilitated by Dale Feinauer of the College of Business.

Green Bay Chapter

This is a heterogeneous group of family business owners and advisors. The group meets to discuss issues identified by them as relevant and to spotlight a group member. This group is facilitated by Sue Schierstedt.

Information Technology

This group is composed of individuals who are responsible for all or part of the information technology of a member or sponsor business. The businesses represented vary significantly in IT staffing. Participants find mutual benefit from discussing technology challenges and learnings with one another.

Non-Family Executive

This group is composed of non-family presidents, chief financial officers, human resource directors, operations and general managers. The group focuses on their unique roles and responsibilities as part of a family-owned business. This group is facilitated by group members.

POPs

This group is composed of next generation family business members who are focusing on their personal and professional development. This group is facilitated by Amy Biersteker and Elise Opicka of Pathmakers, Inc.

Senior Executives

This group is still in the formative phase and would welcome additional members. Group members represent the senior leadership in member businesses. They are focusing on topics including transitioning the business to the next generation, letting go, coaching and mentoring, life after retirement, and other areas of interest. Bill Bassett and Lyle Reigel facilitate these meetings.

Members interested in participating in a peer group are asked to contact Sue.

2008 Forum Scholarship

Zachary Soland is the recipient of this year's Forum scholarship. Zachary is a human resources major in the College of Business at UW Oshkosh. He is very interested in the prospect of working for a family business when he graduates. His sister works in human resources at Bassett Mechanical and has influenced his thinking. Zachary hopes to participate in Forum programs in the coming year.

Thanks to all the members and sponsors who have made this scholarship a reality for students.

Director's Column

Susan Schierstedt



Led by Eric Coryell of Core Connections LLC of New Berlin, the Forum's Board met for its biennial strategic planning meetings in February and March. The process began during the winter with a SWOT analysis sent to our members. That feedback was used to set the following Forum goals for the next 2-3 years:

- build relationships among family businesses, professional organizations interested in assisting family businesses, and UW Oshkosh.
- develop and provide access to programs and resources that add value for family businesses.
- be a self-sustaining Forum.
- promote the awareness of the economic and social value of family business.
- conduct and/or disseminate research on family business issues.

Measures are being established for each of these goals to ensure that we make desired progress.

Second call for volunteers! The Forum is focused on serving family businesses and is directed by the interests and needs of our family business members. I can't over-emphasize the importance of member participation in all facets of the Forum.

The Forum has two standing committees—the Program Committee and the Recruitment & Retention (R&R), both of which are dependent upon member participation for their success.

If you value the Forum; have learned and applied information as a result of your Forum participation; and/or

have told others about this fantastically valuable organization, we need you to serve on the R&R Committee.

Under the leadership of Thom Cody of Pathmakers, Inc., this committee meets as needed to accomplish its goals and is charged with

- ✓ identifying potential family businesses and sponsors and participating in recruiting efforts.
- ✓ developing an annual plan for recruitment and retention.
- ✓ developing appropriate image and marketing pieces, publicity and other tools required for successful recruitment.
- ✓ assisting in the retention and renewal of family businesses and sponsors.

Please give this request your serious consideration and then contact Sue if this is something you are willing to do for the Forum. Thank you!

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.

Questions regarding these opportunities can be addressed to Sue or Donna.

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>Vision & 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>	Pathmakers, Inc.
UW-Madison Family Business Center		
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

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. 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.



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.



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