



News Briefs

September 2010

Building Generations of Family Business Success

New Members:

Green Bay Insurance Center

On June 28, 2010, we welcomed Green Bay Insurance Center (GBIC) to the Forum. Founded in 1968 by Joe Schiegg, GBIC has been transitioning to second generation leadership and ownership.



Joe's sons, Tony and Kevin, are actively involved as partners in running the business. With a staff of 24, GBIC handles all types of insurance: business, personal, life and health.

As members of the Forum, Tony and Kevin want to get involved in discussions with other owners to get good advice for the continued growth and success of their family business. They are also planning to have several of their non-family managers involved in workshops and peer groups.

Jane Sweasy of Jag Outdoor Advertising, Algoma, is GBIC's member buddy. (The role of member buddies is to help new members become an active part of the Forum as quickly as possible by getting acquainted, ensuring they get to programs, and answering their questions.)

Conger Industries, Inc.

On July 14, 2010, Conger Industries, Inc. dba as Conger Toyotalift became a member of the Forum. We were excited to hear that Anika Conger-Capelle initiated the membership application after seeing the Forum's ads in The Business News and on the highway 41 billboards.



Anika, the daughter of founder Gary Conger, is a third generation member of the Conger family business. Her grandparents, Lloyd & Dorothy Conger, founded the business as LPM in Green Bay in 1955. Anika is Gary's successor and a Toyota approved dealer principal and general manager. Gary's sister, TanaWinkka also works in the business as office manager and IT support.

Conger Toyotalift is an authorized dealer for Toyota forklifts and for Aichi Aerial. The business is also a materials handling distributor and provides service and parts for all makes and models of forklift. It also handles rentals, sells tires and does safety training.

Headquartered in Green Bay, Conger Toyotalift also has locations in Wausau and Neenah.

Dustin McClone of the McClone Insurance Group is Conger's member buddy.

Tri City Glass & Door, Inc.

Tri City Glass & Door, Inc. joined the Forum on August 12, 2010. President, Chuck Bender, initiated contact with the Forum to enroll in the Family Business Education (FBE) Certificate Program. When two of his three siblings decided to join him for the FBE program, they realized that it would be wiser for them to also become members of the Forum and take full advantage of all the programs, events, resources, and groups.



Tri City Glass & Door was founded in 1960 by Richard and Shirley Bender. For 16 years, the business was operated out of their home and a 2,000-square-foot warehouse providing the first complete mobile auto glass service in the Fox River Valley. In September 1976, the business was moved to its present location at 100 W. Northland Avenue in Appleton, WI. This expansion gave them the ability to provide residential windows, glass, mirrors and acrylics as well as furnishing glass and glazing products to business and commercial customers. Rapid expansion of the business required additions in 1978 and 1984 to accommodate the continued growth of the company.

In 1986, a second location was opened at 318 N. Military Avenue in Green Bay. This branch store provides products and services to customers in the northeast areas of Wisconsin and Door County. In October 1991, they opened Valley Door Sales in Appleton to handle developing business in furnishing glass and glazing products and construction and builders hardware. In December 1996, Valley Door Sales expanded to a new, larger building at the corner of Northland Avenue and Roemer Road.

In 1992, ownership of Tri City Glass & Door was transferred to its current owners — four of Richard and Shirley's children: Charles Bender, President; Larry Bender, Vice-President; Donna Dorn, Vice-President & Secretary; and JoAnn Bender, Vice-President & Treasurer.

Member Buddy

Thanks to all the members who have assisted in making our new members feel welcome and well-informed. If you haven't already been a buddy, please consider becoming one when the next opportunity arises.

For more information, request the buddy agreement and checklist from Donna or Sue.

Family Business Education (FBE) Certificate Program

Registrations for this year's FBE class are due now. If you and/or others in your business want to enroll in this year's class, they must contact Donna before September 15.

This program is ideal for anyone who wants to understand the key issues faced by a family-owned business. Whether a business owner, non-owning family member, a family business advisor or a student of family business, this program will provide the insights needed.

Each of the seven sessions includes clear information, real world examples, discussion and reflection time. Each session runs from 10:00 am to 4:00 pm one day per month, excluding December.

For further details including topics and class schedule, visit <http://wfbf.uwosh.edu>. Enrollments can be made by contacting either Donna Nelson at nelsond@uwosh.edu or 920-424-1541, or Sue Schierstedt at schierss@uwosh.edu or 920-424-2257.

Building a Management Team

Wednesday, September 22, 2010

8:00—noon

Registration, breakfast & networking 7:30 am

Butte des Morts Country Club, Appleton

Assessing the needs of the organization as it anticipates a change in leadership and/or a new phase in its life is essential. Defining the requirements for your critical management positions is key to continued business success.

Patty Van Ryzin, Vice President of Human Resources for Bassett Mechanical, has developed this workshop to showcase the processes and lessons learned by four family businesses as they developed effective management teams.



Patty Van Ryzin

- David Gneiser, owner of Fond du Lac Bumper Exchange will introduce his business and, with his advisor, Dale Feinauer, will discuss what worked and didn't work as they built a management team.
- Tim Wuest, family member in-law and a member of the leadership team of Badger Mining Corporation, will be joined by Beth Nighbor, Human Resources Director, to explain the processes they have used for leadership identification and development.
- Mike Rekitzke, non-family president of N.E.W. Plastics will be joined by Thom Cody of Pathmakers, Inc. to explain the process they have used to develop, implement, and execute a management team.

Program participants will be given the opportunity to discuss their interests, needs, and issues related to the topic in small groups facilitated by the workshop presenters.

This is an excellent program for owners, family members, HR managers, and others involved in the leadership development of your organization.

Managing the Culture of the Family Business

Tuesday, October 19, 2010

1:00—4:00 pm

Butte des Morts Country Club, Appleton

Barbara Gannon, VP of Corporate & Marketing Communication, Sargento Foods, Inc.

There is much to be learned from the experience of Sargento Foods, Inc. when they chose to capture and perpetuate the culture that was created by their founder, Leonard Gentine.

Barbara Gannon will describe why a company would want to define its corporate culture and then provide a step-by-step case study of what they did at Sargento. The owners initiated the defining corporate culture process. Barbara's responsibility was in recommending and implementing a plan to involve all employees in the process and then communicating the process and the results to all stakeholders.

Sargento Foods, Inc. developed a statement of values and purpose and a corporate culture statement that have made a significant impact on the family and on the business. These statements are used in their marketing to internal and external customers to communicate who they are and what they and their products represent. They believe it provides a competitive advantage.

This workshop is intended for family members as well as for non-family leaders and family business advisers.



WFBF TalkRadio Show

Good news is contagious. We generally tell everyone we meet about "finds" that are just too good to keep to ourselves.

The Wisconsin Family Business Forum fits this description as a valuable "find." So for six months, beginning in August, our members and sponsors are sharing their valuable Wisconsin Family Business Forum (WFBF) experiences with the audience of WOSH TalkRadio 1490 am on the third Monday of each month.

On August 16, Carmen Fosick, a Forum member, talked to the show's host, Bob Burnell, about two workshops that led to significant changes in the way her business, Elmstar Electric of Kaukauna, plans and communicates.

On September 20, Mike Kuechler of Schenck sc, a Forum sponsor, and Vicky Wuest of Badger Mining Corporation, a Forum member, will discuss how they have worked together on succession and estate planning and how the Forum's workshops and peer groups have been part of the equation.

On October 18, Jane Sweasy of Jag Outdoor Advertising will be the guest family business owner. And, on November 15, Thom Cody of Pathmakers, Inc. and Jeff Kirchner of Streu's Pharmacy/Bay Natural will be the guests.

Planning for the December and January shows is in process. If you would like to be part of either of these shows to share what you have learned and/or implemented as part of the Forum, please contact Sue Schierstedt.

Member Recruitment Incentive Program



We want to ensure that every family business in northeast Wisconsin is aware of the Forum and becomes involved, as appropriate, so that they get the information and resources they need to save time, money and resources as they build a successful company and maintain a healthy family.

To encourage members and sponsors to introduce family businesses to the Forum, the Recruitment & Retention Committee has renewed the Member Recruitment Incentive program for another year. The program provides credits applicable to next year's fees for members and sponsors who recruit new members. Credit can be earned for up to three new members a year.

All you have to do is

- Tell a non-member family business about the value you get from the Forum,
- Invite them to attend a program as your guest, and/or
- Be listed by them as the referral when they apply for membership.

If you would like recruitment materials to share with a prospective member, request the materials from Donna.

You can also refer a prospective member to our website for information about programs, peer groups and other resources — <http://wfbf.uwosh.edu>.

For more information about this incentive program and for Forum brochures, contact Donna or Sue.

Peer/Affinity Groups

Members of Forum peer groups, continue to tell us that the peer groups are an essential part of their Forum involvement.

The peer groups provide a confidential environment in which to share challenges and successes, brainstorm ideas, and develop skills needed for successful leadership, ownership, and family communications. This happens because the peer groups are composed of others who understand the nuances of family business from a similar perspective and are well-facilitated.

The Forum's peer groups are setting their annual schedules with meetings beginning in September.

The following groups will reconvene following their summer breaks. They are listed with their facilitators.

- Senior Executives—Tim Wuest & Bill Bassett
- Generation Now — Dale Feinauer

- TBD — Dale Feinauer
- Non-Family Managers/Executives — Sue Schierstedt
- Green Bay Chapter — Sue Schierstedt
- Sponsors — rotates among sponsors

Note: A new group is forming with Donna Nelson as the facilitator. The first meeting of that group is scheduled for the afternoon of September 9. Anyone interested in participating should contact Donna at 920-424-1541 or nelsond@uwosh.edu.

Creation of the Forum — A 15th Anniversary Item



In March 1995, Craig Smith, founder of Retained Earnings Company and a MassMutual — The Blue Chip Company agent, met with Dean Robert Milam of the College of Business Administration, UW Oshkosh to introduce the idea of a family business organization. He had learned about family business centers which MassMutual was sponsoring on the east coast and thought it would have value in our area.

According to Craig's recollection, Dean Milam received this concept with great enthusiasm and immediately assembled a team to work with Craig on development of the concept. This proved to be the inception of the Wisconsin Family Business Forum.

By June 1995, the College team composed of Burk Tower, Al Hartman and Don Gudmundson had developed a second draft of the proposal for a Family Business Forum. The draft reflected the research that had been done into existing centers, a financial model, and how it might be implemented in the Fox Cities. On June 13, 1995, the draft proposal was sent by Burk to the campus CFO, Joel Edson, for his review, thoughts and suggestions.

As this organization was the first of its kind in the state of Wisconsin, the planning team named the organization the Wisconsin Family Business Forum.

By August 1995, the concept was introduced to family businesses through focus groups. Seventeen area family businesses expressed initial interest in the organization. In August, an advisory committee was formed.

By fall of 1995, member and sponsor recruitment began.

Director's Column:

We are planning to run a slide show during the Annual Dinner reception that depicts people and events from the past 15 years. As I was looking at some of the archived images, I noted that we have all changed a little bit since 1995-96.



If you have any memorabilia of the Forum that you would like to share in celebration of our 15th anniversary, please contact me. Thanks to everyone for your roles in the Forum's success!

* Thanks to Deb Wendt and Techni-Flex for the anniversary logo.

Program Calendar

Wisconsin Family Business Forum

<u>Date</u>	<u>Event</u>	<u>Presenter(s)</u>
Sep 22 8:00 am—noon Registration, networking & breakfast at 7:30 am	<i>Building a Management Team</i>	Patty Van Ryzin Bassett Mechanical
Oct 19 1:00—4:00 pm	<i>Managing the Culture of the Family Business</i>	Barbara Gannon Sargento Foods Inc.
Dec 2 3:00—6:00 pm	<i>2nd Annual Family Business Expo</i>	Program Committee & R&R Committee
Jan 26, 2011 8:00—noon Registration, networking & breakfast at 7:30 am	<i>Selecting, Utilizing and Coordinating Your Advisors</i>	Greg McCann McCann & Associates

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

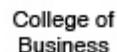
Family Business Center at UW-Madison

Sep 14 8:30—11:30 am	<i>Fire Drills: Leadership Development Using Strategic & Contingency Planning Models</i>	Bonnie & Mike Hartley Cultivating Change LLC
Nov 4 3:30—5:45 pm	<i>Economic Outlook</i>	Dean Mike Knetter, UW-Madison Wm. C. Foote, USG Corporation/Federal Reserve Bank

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

As a benefit of membership, Forum members may attend UW-Madison's Family Business Center programs. 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. There is a minimal per person fee. For more information contact Donna or Sue.

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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