

*Helping Family Businesses Succeed Since 1996*



# FAMILY TIES

A quarterly publication from the UW-Madison Family Business Center to help our members stay connected to each other and to the FBC.

## *Food for Thought* *Members-Only Breakfast Series Is A Hit!*

The January 15, 2008 members-only breakfast series showcased the expertise of Founding Sponsors, Steve DiTullio, **DeWitt Ross & Stevens** and John Zimdars, **The Zimdars Company**. Members were alerted to the latest facts of disciplining, investigating, terminating employees and long-term care insurance.

The next *Food for Thought* will be held on Tuesday, May 13, 7-9:30 a.m. in 8th floor Fluno Skyview room. **Associated Bank** and **The QTI Group** will host and present “Consumer Driven Health Plans and Individualized Pay”, a part of a total rewards strategy.

## *Family Business Women*

Sue Alt, founder and owner of **Kitchen Hearth**, shared her trials and successes of growing her business during the December 4 tour of her new site. Her expert chefs amazed the *Women’s* group with culinary displays.



*Family Business Women* enjoying a fabulous **Kitchen Hearth** lunch during the December 4, 2007 meeting.

## Meet the New FBC Advisory Board

*By FBC Director Ann Kinkade*

Among other changes underway at the FBC this year, we have also reorganized the composition of the Center's Advisory Board. For its first decade, the FBC's Board was comprised solely of FBC Sponsors. In order to provide me with a more balanced perspective as the FBC takes on new strategic initiatives, the Board now includes representation from three entities: Sponsors, Members and Independents.



**Ann Kinkade**  
FBC Director

- There is representation of both our Founding Sponsors who have largely been with us since the Center's inception and Sustaining Sponsors - new this year - who support us now and in the future.
- There is representation among our Members in terms of geographic location, company size, number of years of FBC membership, and company age.
- The two Independent directors have no vested interest in the outcome of FBC activities, but they fully support our mission, vision and values and bring a valuable outside perspective.

Board members will serve varying term lengths to ensure a regular influx of new ideas and retention of organizational history. The Board's primary responsibility is to provide candid feedback and

*Board: Continued on Page 3*

## MEMBER/SPONSOR NEWS

### Welcome New Members:

- Carpets Plus of Wisconsin
- Kirsh Foundry
- Wiedenbeck, Inc.
- Windsor Industries

**H.J. Pertzborn** will begin celebrating its 80<sup>th</sup> anniversary year this spring. They also celebrated receiving the *Employee Safety and Health Achievement* award for outstanding improvement on accident and health costs.

In WKOW-TV's "Down to Earth" series, **KleenMark** was featured for being on the forefront of using environmentally friendly cleaning products and for training their employees to safely use all cleaning products.

**J.P. Cullen & Sons** was among the five winners of the 2007 *Torch Awards for Business Ethics and Integrity* presented by the Better Business Bureau of Wisconsin.

**Newcomb Construction** received the 2007 *Tilt-up Achievement Award* and the 2007 *Build Wisconsin Award* from AGC for construction excellence.

Deb and Curt Bembenek, **ServiceMaster Building Maintenance**, have a lot to celebrate: the 20th anniversary of their franchise, *Vendor of the Year* by Ryan Properties and the joy of community involvement from assisting the Southern WI High School Down Hill Ski Teams.

Eric Schwartz, **Sara Investment Management**, was featured in the *Capital Region Business Journal* in helping the non-profit day care center, Child Development Inc., keep its doors open. The center exists for the benefit of low income, single moms and to provide quality education for the children.

## CENTER NEWS

### Welcome New Sustaining Sponsor:

# MOSLEY

*An Independent INVESTMENT FIRM*

**Mosley** is a wealth management firm with offices in Madison and near Austin, TX. Owner, Scott Mosley, has an MBA from the University of Texas-Austin and is a former Officer in the US Navy. He is married with two boys. Scott is an avid cyclist and aspiring tri-athlete. Meet Scott at FBC events and stop by the sponsor table for Mosley company materials.

**FBC in the News:** The November issue of *Business Watch* interviewed Ann Kinkade regarding three best practices for business-owning families successfully transitioning to the next generation: holding family meetings, undergoing strategic planning and having an independent board. Sue Alt and son Mike Adix of **Kitchen Hearth** were featured in the article as a good example of a company following these recommended steps.

## 2008 SUMMER TAILGATE

Wednesday, July 9, 2008

Memorial Union: 5:30-9:00 p.m.

Howdy Holmes, President/CEO of Chelsea Milling Company, makers of *Jiffy Mix*, will be the guest speaker at the 2008 *Summer Tailgate*. The event will be held at Memorial Union on Wednesday, July 9 from 5:30-9:00 p.m. Howdy is fourth generation of his family's business, founded in the 1800's and based in Chelsea, MI. He "mixes" humor with heartfelt storytelling to provide a meaningful and valuable perspective of the family business. Entertainment included!



## You Can Help Build FBC Awareness

The FBC would like to thank everyone who has filled in the referral/drawing stub at the bottom on the program evaluations. It has been a record year for referrals and membership growth. FBC Staff has also noticed the new member decals are being proudly displayed. Another way to build FBC awareness is to mention the Center when you are interviewed by the media. A testimonial from you about the value of your membership can't be beat!

## MEMBER IN THE SPOTLIGHT (MITS)

At the beginning of each program, a member company provides five minutes of insight as to how their family/family business handled challenges and continued on a path of success. Pictured below are recent Members in the Spotlight (MITS). *Call 441-7347 to be the next MITS!*



MITS Charlie Crave introducing George and Tom Crave of **Crave Brothers Farm/Farmstead Cheese** on November 5, 2007

Doug Dittman and Tony Arneson, **The Neckerman Agency**, were the MITS presenters on November 6, 2007



Chris, Joanne and Jim Driscoll, **PKK Lighting**, posed after their MITS presentation on December 10, 2007

## **Board:** *continued from page 1*

input as the Center transitions into its next decade of service to business-owning families.

Some key issues the board will help address are:

- Center expansion and membership growth
- Long-term financial stability
- Enhancing member value
- Establishing a support structure to create intellectual capital

Current board members include:

- Ray Aldag, *UW School of Business*
- Mark Cullen, *J. P. Cullen & Sons*
- Londa Dewey, *The QTI Group*
- Doug Dittmann, *The Neckerman Agency*
- Neil Fauerbach, *Smith & Gesteland*
- Kim Hendricks, *ABC Supply Company*
- Vesla Hoeschen, *Bemis Manufacturing*
- Jeff Lerdahl, *Lerdahl Business Interiors*
- Ken Pientka, *PLANNING Design Build*
- Marian Quade, *Thompson Investment Mgmt.*
- Jennifer Smith, *Thrive*
- Michael Smith, *Johnson Bank*

If you are interested in serving on the (unpaid, voluntary) Family Business Center Advisory Board at some point in the future, please let me know.

Your opinions always matter, so you do not have to be a board member to make a difference or to have a voice in your membership. Feel free to contact me at: [akinkade@bus.wisc.edu](mailto:akinkade@bus.wisc.edu) or by phone (608) 441-7338 any time with new ideas, questions, or concerns.



Linda Hughes, **Bell Labs**, was the Member in the Spotlight on December 11, 2007

## FAMILY BUSINESS CENTER SPONSORS

A special thank you is extended to the following sponsors. These businesses provide the Center and its members not only with necessary financial support, but also with expertise in family business issues and a commitment to the cause of family businesses. If you have questions, they can help.

### Founding Sponsors

- ASSOCIATED BANK N.A.
- DEWITT ROSS & STEVENS S.C.
- SMITH & GESTELAND LLP
- THE QTI GROUP
- THE ZIMDARS COMPANY INC.
- THOMPSON INVESTMENT  
MANAGEMENT, LLC

### SUSTAINING SPONSOR

- JOHNSON BANK
- MOSLEY, AN INDEPENDENT INVESTMENT FIRM



*Social Intelligence in the Family Business*  
**Greg McCann, McCann Consulting, Inc.**

### **Option 1: Monday, March 3, 2008**

12:30-1:00 p.m.: Refreshments, Relationship Building

1:00-4:30 p.m. Program

### **Option 2: Tuesday, March 4, 2008**

7:00 – 8:00 a.m.: Breakfast, Relationship Building

8:00-11:30 a.m.: Program

In a world where you must interact with others to present your ideas and work as a member of a team to achieve recognition, interpersonal skills are where you can advance or derail your career. Every communication, whether verbal or even non-verbal, defines who you are as perceived by others. McCann gives you a six-step process to improve your socially applied intelligence, including how to involve others in your efforts.

### **To register:**

**Online:** <http://exed.wisc.edu/fbc>

**Call:** (608) 441-7347

**Fax:** (608) 441-7337

Page 4

Family Business Center  
Fluno Center  
601 University Avenue, Room 338  
Madison, WI 53715-1035

ADDRESS SERVICE REQUESTED

**FIRST CLASS MAIL**