



Institute *for* Family-Owned
Business

www.fambusiness.org

IFOB: 2022 Proposed Programs By Type **Theme: Leading with Courage**

“How-To’s” for the Family Business Series – (Open to all, Zoom or in-person)

Leadership, Culture & Growth “How-To” Sub Series

1. “How-To”: Where are you in your leadership journey and structuring your organization for growth

Speakers: Michelle Wyman and Steve Musica, Lean East

Family Business Panelists: Peter Horch, Horch Roofing and Lilly Mullen, Springer’s Jewelers

Sponsored by: Mascoma Bank

Where are you in your Leadership Journey and how do you Structure your Organization for Growth?

Attendees will learn a bit about their own leadership style, learn the importance of developing leaders in their organization, and walk away with some tools and techniques they can use in their business. In addition, they will learn how to position their organization for growth with improved processes. Key take-aways include:

- The need to focus on “Customer Value”
- The importance of understanding the current state of your business and business processes
- How to look at the structure of the organization, define it, and improve it
- The business metrics you need to track. What you measure matters!
- Every business can make improvements and move from good to great

They will also have the opportunity to ask questions from the facilitator and several family-owned business owners.

Scheduled: Thursday, May 12 from 8:00 – 8:30 a.m. Continental Breakfast, 8:30-10:00 a.m. Program

Location: BerryDunn – 2211 Congress Street, Portland, ME 04102 and Zoom

Cost: Free for members, \$35 for future (non) members, \$15 for future (non) members on Zoom

2. “How-To”: Meaningful Giving as a family business: Panel Discussion with prominent business leaders

Speaker: Randi Hogan, Hogan Philanthropy Consulting, LLC.

Family Business Potential Panelists TBD

Sponsored by: Key Bank and MaineBiz

This session will feature examples of how family businesses in Maine developed their charitable giving strategies. Participants will learn how different families approached their planning process and take away several ideas to inform their own planning. Many family businesses are generous with charitable giving and deeply involved in their communities. How families in business respond to the opportunity to make a lasting impact and create a legacy is as



unique as the family itself. Join us to hear how three different families approached their planning, developed their giving portfolios, and learned and grew along with their community partners.

Scheduled: December 1 or December 15? from 8:00 – 8:30 a.m. Continental Breakfast, 8:30-10:00 a.m. Program

Location: BerryDunn – 2211 Congress Street, Portland, ME 04102 and Zoom

Cost: Free for members, \$35 for future (non) members, \$15 for future (non) members on Zoom

Succession How-To Sub Series

3. “How-To”: Succession program

Speaker: Kevin Haley, Brann & Isaacson

Potential Panelists: Mike Davis, President from IRC Industrial Roofing Company and Brett Wickard, Owner of Bull Moose Music

Sponsored by: The Breakwater Group and Maine HR Convention

During this program, attendees will hear from a panel of family-owned businesses who have both family members and non-family members working at the top level of the business, with each business at a different stage of the succession process including an ESOP.

The program will include:

1. Introduction of succession planning as an issue and discussion of the challenges that it presents, legally and financially
2. Introduction of several models of succession planning and pros/cons of each: gift/sale to family, sale to senior manager or managers, ESOP, sale to third party, testamentary disposition
3. Discussion of planning time frame and preparations that make sense: estate planning, valuation, identification of prospects, incentivizing senior managers to stick around.

Scheduled: April 28 from 8:00 – 8:30 a.m. Continental Breakfast, 8:30-10:00 a.m. Program

Location: BerryDunn – 2211 Congress Street, Portland, ME 04102 and Zoom

Cost: Free for members, \$35 for future (non) members, \$15 for future (non) members on Zoom

4. “How-To”: Protecting a Lifetime of Savings; What Washington Needs to Know & Benefits of Businesses Owning their own Real Estate

Speaker: Pat Soldano, Family Enterprise USA (FEUSA) and J. Casey McCormack, Spinnaker Trust

Family Business Panelists: John Finegan, Boulos Company, Adam Reny, Renys, and Deirdre Wadsworth from Hardypond Construction

Sponsored by: Spinnaker Trust, Boulos Company, Maine HR Convention and Mainebiz

Join Pat Soldano, Family Enterprise USA’s (FEUSA) President, who will set the stage as she shares important insights collected from the organization’s annual Family Business survey and meetings with members of Congress including their top tax concerns, succession data, and significant Family Business challenges. Family businesses will learn how important they are to the economy and how to advise Congress of their importance; the current tax laws and proposals that will change their businesses.



From this theme of protecting a lifetime of savings, we'll then discuss breaking down the "bricks & mortar" of owning, managing, selling and/or transferring a Real Estate and Property Portfolio when owned by the family business. We'll hear from Spinnaker Trust and their commercial real estate investment group, a family real estate business broker and two family businesses that own and develop several properties.

Scheduled: Thursday, October 20 from 8:00 – 8:30 a.m. Continental Breakfast, 8:30-10:00 a.m. Program

Location: BerryDunn – 2211 Congress Street, Portland, ME 04102 and Zoom

Cost: Free for members, \$35 for future (non) members, \$15 for future (non) members on Zoom

ONLINE SERIES – (Open to all)

1. Legal Lunches (1 hour 12:00 p.m. – 1:00 p.m. virtual legal topic discussion)

Sponsored by: PretiFlaherty and Mainebiz

Family Business Potential Panelists: TBD

The Legal Lunch series will be a 1-hour, virtual discussion with a legal representative from PretiFlaherty and a family-owned business.

THIS YEAR'S THEME: RISKY BUSINESS

Your business faces various risks every day. The decisions you make as a business leader can either mitigate or exacerbate that risk. Gone unchecked, or mismanaged, business disputes can quickly become costly legal disputes. In this series, we will address the idea of risk avoidance – the intersection of where business problems become legal problems and how to navigate them. And we'll learn about the most common legal problems and the underlying business decisions that can avoid them.

- I. **TBD | 12:00 – 1:00 p.m.**
 - a. Protecting Your Workforce from Poaching (TBD) – Jeff Messer, Messer Truck Equipment
- II. **TBD | 12:00 – 1:00 p.m.**
 - a. Protecting Your Company from Product Liability/Class Action Suits (John Cronan and guest) – Pete from Origin?
- III. **TBD | 12:00 – 1:00 p.m.**
 - a. Avoiding Conflicts in Leadership (Sara Moppin or Emily White and guest) - TBD
- IV. **TBD | 12:00 – 1:00 p.m.**
 - a. Knowing When it's Time to Go Global (Mariana Baron and guest) – Luke's Lobster?

2. Chit Chat with Cat (recorded 30 minute, not live/ no audience, videocast series)

Sponsored by: Machias Savings Bank

This series will be short, 20 minutes to a half hour storytelling interviews with family businesses and associate partner members. We have a "call out" to our members to see who wants to be interviewed. We will do a drawing with all that apply to see who will be highlighted.

This idea was born with the vision to try to do something completely different. While we are typically known for our programs, this will be more of a "interview" with more storytelling from both the IFOB and the member highlighted in each episode. The idea is for our business community to learn more about the IFOB, our members and Catherine (the



leader of our organization aka “Cat”). By promoting it this way, we are utilizing this piece as marketing material to inform and get more people involved with the Institute and a chance to also mention upcoming programs as we go through the calendar year.

Schedule: TBD

Location: Zoom

Cost: Free to participate and watch

3. IFOB Discovery Sessions

These sessions will help to implement a new pipeline model to have the IFOB engage more sponsors, volunteers and influencers by creating fans of the IFOB with a real passion for what we do. We’ve created a “Behind the Scenes Experience” that we hope will increase qualified board members, web/social traffic and memberships. With small group presentations, we will introduce new people to the IFOB and listen to their opinions and then do a quick follow up call. After the presentation and follow up discussion, simple opportunities to engage include inviting others to upcoming presentations or events as well as joining as a member or sponsor.

Cost: Free

Location: Zoom

1. Wednesday, February 16 – 12:00- 12:45 p.m.
2. Wednesday, May 17 – 12:00 – 12:45 p.m.
3. Wednesday, TBD– 12:00 – 12:45 p.m.
4. Wednesday, September 20– 12:00 – 12:45 p.m.

4. NAVIGATING THE REMOTE WORLD

This new online series hosts programs that are essential in navigating and managing the remote world. It’s clear that remote work is here to stay in one shape or another. This series will guide businesses on cyber security, marketing, recruitment & retention and the proper tools to set them up for success within a remote workforce. Each panel will have a service provider known as the professional within the topic, and a family business as a practical example.

1. From BIG Tech to Maine Tech – A Behind the Scenes Look at Navigating in a Remote World

Speakers: Malinda Gagnon, Uprise Partners CEO, and Brian Gagnon, Uprise Partners CTO

Sponsored by: Masthead

Ever want to go behind the scenes at a technology company? For many of us, technology is a black box. We know it’s important to power our business and make our lives easier, but it can be unfamiliar and boring at the least and even a bit scary at its worst.

This session will give you an inside perspective from a husband-and-wife team who are technology industry veterans from the world’s largest tech companies, and who have built their own technology company right here in Maine to help family-owned and small and medium-sized businesses. You’ll hear about how they are building a thriving and sustainable business with a great culture, how they navigate the demands of a growing business, how they make it work as business partners and life partners, and some quick tips and tools like Gusto that can help you run your own business.



Schedule: Thursday, June 2 from 12 noon – 1 p.m. - Zoom

Location: Zoom

Cost: Free for members, \$15 for future (non) members

2. Cyber Security, Cyber Insurance, Fraud and Crisis Mitigation for Your Company

Speakers: Dave Hodgdon, Portsmouth Computer Group, Tim Forte, Clark Insurance and Shelly Pray, Bangor Savings Bank

Family Business Speaker: Derek Volk, Volk Packaging Corporation

Sponsored by: Masthead and possibly Bangor Savings Bank

With an alarming uptick in data breaches and ransomware, an increasing number of businesses have opted to add Cyber Risk Insurance to protect themselves from catastrophic loss. As the threat landscape continues to expand, many insurance companies are scrutinizing payouts by creating more claim exceptions and exclusions and banks are seeing fraud of all types that are impacting all Maine businesses.

We'll discuss Cyber Security threats and events in the headlines—Different reasons that can drive the need for an assessment—General concerns, industry specific policy requirements, cyber insurance and banking guidelines—The phases that make up a security assessment—What to expect during the phases —The tools used to complete the assessment—What a timeline looks like—Information from reports that are generated. And we'll here from a family-owned business about their experiences on this topic.

Schedule: Thursday, June 23 from 12 noon – 1ish pm

Location: Zoom

Cost: Free for members, \$15 for future (non) members

3. Recruitment and Retention in a Remote and Live World

Speakers: Tawny Alvarez, Verrill and Mari O'Neil, Retail Association of Maine

Family Business Potential Panelist: Paige Hartman, Kittery Trading Post and Danielle R. Hansen, JD, Chief Executive Officer, P&A Bookkeeping and Business Services

Sponsored by: Masthead and possibly USM TBD

We hope to address ways to create policies and practices that help you retain top performers without creating risks of discrimination suits. Studies show remote work has made it easier for some employees to exert power over those who are vulnerable. The blurring of professional and personal spaces is carrying trauma from home into the workplace and vice versa. You'll learn why a remote harassment policy needs to include an expansive definition of what harassment is and looks like at work both in a remote and in-person setting.

We'll also learn about Retail Careers for ME that was developed through the Maine Business Education Partnership, a 501 (c) (3) program of the Retail Association of Maine. They have partnered with the National Retail Federation Foundation's RISE UP curriculum and Maine Office of Tourism to create "Retail Careers for ME" which aims to promote retail career opportunities available in the state of Maine as well as retail training and credentials to jump start your career or refresh skills.



We'll learn how they help to recruit and retain workers and hear from a family-owned business on their challenges and successes.

Schedule: September 7 or 13 from 12 noon – 1ish pm

Location: Zoom

Cost: Free for members, \$15 for future (non) members

4. Look to New Ways of Marketing your Business in 2023

Speaker: Jesse Fowler, OSC Web Design

Family Business Panelists: Marie Stewart Harmon of Lisa-Marie's Made in Maine

Sponsored by: OSC Web Design and Masthead

Is traditional marketing not showing the same results as it used to? Are you ready to look at new ideas but skeptical that online marketing is the right fit for you? We understand the skepticism when you have been doing marketing the same way for many years and we look to show you how online marketing through a new website can coexist and add emphasis to your existing marketing plans. We'll also discuss generational differences in the approach to online marketing and traditional marketing.

Schedule: Tuesday, December 6 from 12 noon – 1ish pm

Location: Zoom

Cost: Free for members, \$15 for future (non) members

SIGNATURE EVENTS – (Open to all)

1. 22nd Annual Maine Family Business Awards

Wednesday, October 12 – Open to All - 5:00 – 9:00 p.m., with numerous sponsors at the Holiday Inn by the Bay

Keynote Speaker: Tony Simmons, Tabasco Sauce

Price: \$110 in-person; FREE virtually and Table: \$1500 (10 tickets)

2. Family Fun Festival

Scheduled for Wednesday, August 17 from 4-8 p.m.

Location: River Winds Farm, Saco

Sponsored by: MaineBiz others TBD

Price: ? for Members, \$? for Future Members

3. Holiday "New Year" Party

Scheduled for Wednesday, January 25, 2023, 5:00-7:00 p.m.

Location: The Woodlands Club, 39 Woods Road, Falmouth

- Sponsored by Founding Sponsors: Verrill, BerryDunn, MEMIC, TD Bank, Clark Insurance and Richard Brothers Financial Advisors

Price: Free for Members, \$35 for Future Members



Family Business Spotlight / Business After Hours – (Open to all)

Sponsored by Harvard Pilgrim Health Care and Mainebiz

Price: Free for Members and Chamber members, \$10 for Future Members

The Nonantum Resort

a. Date TBD, Monday, 5:00 – 7:00 p.m.

Warren's Office Supplies

b. Date TBD, Monday, 5:00 – 7:00 p.m.

Fun and Function – (Open to all)

Series Sponsored by Baker Newman Noyes

The “Fun and Function” series creates a break from the educational series, while still addressing important topics and having fun in the process!

Don't Sweat the Small Stuff & Dancing with Inspiration: A story of positivity

Speaker: Lovelynn Ivey, Lovelynn Ivey Consulting

When people think of having a positive attitude, they might think that means showing surface level signs of happiness, like putting a smile on one's face or trying to think happy thoughts. But it's more than that. A positive attitude is something that goes deeper and has an effect beyond surface cheer. Negative attitudes promote fear, while positive attitudes do the opposite and promote a more hopeful outlook on life. Join us and relax with a beverage, delicious hors d'oeuvres and fabulous company!

Running a business can be complicated. Don't get caught up in the weeds. In this seminar you will learn to;

- Identify and avoid time whirlpools
- Focus on what matters most each day
- Bring home the energy to your family each evening
- Live in the moment and don't let it pass you by
- See the glass half full
- Prioritize and achieve your most important goals, instead of constantly reacting to urgencies
- Increase motivation, energy, and work/life balance by making time for renewing activities
- Make lemonade
- Put on their shoes and find the rainbow
- Wake up with gratitude

Scheduled: Thursday, May 19 from 4-6 p.m.

Location: The Woodlands Club, 39 Woods Road, Falmouth ME, 04105

Cost: Free for members, \$35 in-person



Equality 2.0: Has Covid- 19 Balanced the Gender Scale?

Moderated by Noelle Castle, Owner Castle Media Co.

Panelists: Erin Clymer Lessard, Owner, Lessard Consulting; Sarah Halpin, Partner, Back Cove Financial; Joan Fortin, CEO, Bernstein Shur and Dayton Benway, Managing Principal, Baker Newman Noyes

Join the IFOB for a panel discussion with prominent and successful business women (and man) who will share their experiences and discuss their journeys in an often male-dominated world. Everyone is welcome - members, fellow employees and team members, future members - all!

After a successful Zoom program in 2020, we decided to bring this timely topic back in-person and hybrid. Our members tell us this topic has enough engagement and they want us to include more male voices. Has the pandemic spurred gains in gender equality, equal pay, and family orientated work practices? Or has it set us back? Learn some ways to close that gap between what you know is real and how others perceive (or how you want them to perceive) you. What is your worth? Is there a cultural shift with salaried hours (only 40 or until the job is done)? If child care is an issue, who takes precedence?

We'll discuss work life blend, equality, and dynamics in the workplace both remotely and in the new "normal". From the stories of our speakers, you will discover how they have learned not only to survive but to thrive. Some of the strategies they will impart to you include: gaining credibility, gaining respect, being effective, and succeeding in the workplace. Along with the audience, we'll discuss what challenges and triumphs we encounter along the way. We'll have plenty of time to connect, network and to learn!

Scheduled: Wednesday, November 16 from 4-6 p.m.

Location: Bernstein Shur

Cost: Free for members, \$35 in-person (future members)

Sponsored by: BNN and MaineBiz

Wine & 9 and Golf Scramble

Nonesuch River Golf Course, Scarborough

Sponsored by: Baker Newman Noyes and Masthead

Price: TBD

"Wine & Nine" – 6 classes on Tuesdays from 5-7 p.m. scheduled as follows (with an anticipated rain date built in if needed):

1. Tuesday, May 3
2. Tuesday, May 10
3. Tuesday, May 17
4. Tuesday, May 24
5. Tuesday, May 31
6. Tuesday, June 7
7. Tuesday, June 14 (rain date)

8. Tuesday, June 21 from 8 a.m. – 1 p.m. Golf Scramble to Invite Men

Sponsored by BNN, Old Port Advisors, Gorham Savings Bank, MaineBiz and Masthead Maine



AFFINITY GROUPS: (By reservation only)

CEO Central

5-8 p.m. in-person or 5:30-7p.m. Zoom (By reservation only) – generally 4th Tuesday of the month

Location: Falmouth, ME

Price: \$75 a meeting (free if on Zoom)

Sponsored by MaineBiz

1. Tuesday, March 1 | 5:00 – 8:00 p.m.
2. Tuesday, April 26 | 5:00 – 8:00 p.m.
3. Tuesday, May 24 | 5:00 – 8:00 p.m.
4. Tuesday, September 27 | 5:00 – 8:00 p.m.
5. Tuesday, November 29 | 5:00 – 8:00 p.m.

NEW Affinity Group

C-Suite Central Forum – TBD

Location: Falmouth, ME

Price: \$75 a meeting (free if on Zoom)

Sponsored by MaineBiz

Women's Leadership Forum

Sponsored by MaineBiz

Breakfast meeting from 8:30 a.m. - 10:00 a.m. if in-person / 9-10:30 a.m. if Zoom

Location: Portland, ME

Price: \$35 (free if on Zoom)

Our goal for this forum is to have women who lead family businesses to have a chance to meet multiple times each year to be filled with inspiration, encouragement and friendship...oh, and of course a great meal (if in-person). Understanding that we are all very busy women and our time is precious, we work to provide a program that is valuable as a leader and also as a woman. We hope to offer not only solid information that will help give an edge in the workplace, but also be a safe place to share and inspire other women.

This Forum is for women in top leadership roles within their family business who are members and is not open to Associate Partners.

1. Tuesday, February 8
2. Tuesday, April 5
3. Tuesday, May 3
4. Tuesday, August 2
5. Tuesday, October 4
6. Tuesday, November 1

Next Generation

5 Peer Advisory Groups and 1 open program (By reservation only)

Sponsored by Harvard Pilgrim Health Care



Peer advisory groups are small, confidential discussion groups that are facilitated and allow individuals to share experiences and learn from each other in a safe and open environment. These groups are for those actively working in a family business or who are interested in joining the family business, are IFOB members and in non-competing businesses.

Ideally, only one member of a family will be in each peer group. The Executive I & II Groups are facilitated by Anne Hussey of Quad Group. The Executive III and Executive Blend groups are facilitated by Priscilla Hansen Mahoney of Blazing Trails Coaching.

NEXT GENERATION: Executive I, II, III - Next Generation members who are working at the top management levels within their company i.e. Vice President, President, CEO, CFO levels.

NEXT GENERATION: Executive Blend – This group is for those who have been working in the family business for a while and are now moving into a more executive role i.e. a Finance Manager moving to a GM.

Leaders in Transition - A facilitated, confidential peer group where current business leaders have the opportunity to process with and learn from other leaders who are at different stages of transition with their rising next generation family members.

Peer Advisory Groups – 5 meetings each, 1 social and 1 open meeting for 7 total meetings.
Location for all: Portland, ME and Zoom

Executive I – Generally - Thursdays, 1-3 p.m.

Price: \$450

1. Kick Off – All Groups - Thursday, March 24 from 3-5 pm - BerryDunn
2. Thursday, April 7 – 1-3 pm – BerryDunn
3. Thursday, May 26 – 1-3 pm - BerryDunn
4. Thursday, June 16 – 1-3 pm - BerryDunn
5. Thursday, July 28 – 1-3 pm - BerryDunn
6. Thursday, September 8 – 1-3 pm - BerryDunn
7. Open Multi-Generational Panel Program – All Groups – Thursday, November 3 from 3-5 pm - BerryDunn

Executive II – Generally - Wednesdays, 10 a.m. -12 noon

Price: \$450

1. Kick Off – All Groups - Thursday, March 24 from 3-5 pm at BerryDunn
2. Wednesday, April 6 – 10 am – 12 noon - BerryDunn
3. Wednesday, May 18 – 10 am – 12 noon - BerryDunn
4. Wednesday, June 22 – 10 am – 12 noon - BerryDunn
5. Wednesday, July 20 – 10 am – 12 noon - BerryDunn
6. Wednesday, September 21 – 10 am – 12 noon - BerryDunn
7. Open Multi-Generational Panel Program – All Groups – Thursday, November 3 from 3-5 pm at BerryDunn

Executive III – Generally - Wednesdays, 3-5 p.m.

Price: \$450



1. Kick Off – All Groups - Thursday, March 24 from 3-5 pm at BerryDunn
2. Wednesday, April 20 – 3-5 pm - BerryDunn
3. Wednesday, May 25 – 3-5 pm - BerryDunn
4. Wednesday, June 1 – 3-5 pm - BerryDunn
5. Wednesday, July 20 – 3-5 pm – BerryDunn
6. Wednesday, September 28 – 3-5 pm - BerryDunn
7. Open Multi-Generational Panel Program – All Groups – Thursday, November 3 from 3-5 pm at BerryDunn

Executive Blend – Generally - Wednesdays, 8-10 a.m.

Price: \$450

1. Kick Off – All Groups - Thursday, March 24 from 3-5 pm at BerryDunn
2. Wednesday, March 30 – 8-10 am - BerryDunn
3. Wednesday, May 25 – 8-10 am - BerryDunn
4. Wednesday, June 29 – 8 -10 am – BerryDunn
5. Wednesday, July 20 – 8-10 am - BerryDunn
6. Wednesday, September 14 – 8-10 am - BerryDunn
7. Open Multi-Generational Panel Program – All Groups – Thursday, November 3 from 3-5 pm at BerryDunn

Leaders in Transition – Monday, 5-7 p.m.

Location: Zoom or Portland

Price: \$?

1. TBD
2. TBD
3. TBD

The purpose of this peer group is to provide current business leaders with a confidential forum where they have the opportunity to process with and learn from other leaders who are at different stages of transition with their rising next generation family members. Participants share successes and challenges from their own personal experience. They have an opportunity to discuss concerns, test out ideas, and have the chance to ask questions as they figure out their new role as they transition out from the day-to-day running of their business. Sharon Dorsett, PhD of Dorsett Organizational Dynamics will facilitate the session and contribute her thoughts as she has worked with many family-owned businesses.

Open Next Generation Recruit Program: (Open to all)

Multi-Generational Panel

Sponsored by Harvard Pilgrim Health Care and Masthead

Speaker: Anne Hussey, Quad Group

Family Business Potential Panelists: TBD

Schedule: Thursday, November 3 from 3-5 pm

Location: BerryDunn – 2211 Congress Street, Portland, ME 04102 and Zoom

Price: Free for Members, \$35 for Future Members

This is our annual Next Gen celebration / recruitment program with our existing groups and a great opportunity for future members to make new connections, and learn about the Next Gen Affinity Groups and how they have helped



members run their family-owned business. We'll hear from family business leaders of companies spanning a 1st generation business through to a 6th generation business (or possibly a 12th generation business). They will provide insight to the challenges of each stage of their business and share critical success factors. Learn from those who have done it! This event will be facilitated by Anne Hussey of Quad Group, also a 6th generation owner of Hussey Seating Company. Attendees will have a better understanding of the common characteristics of a business in each of the 6 generations. They will also learn more about the best practices for business continuity and how to successfully navigate the challenges of each phase