



## **IFOB 2018 Calendar by Type of Program**

### **Theme: “Inspiration & Perspiration: Strategies and How To’s for Family Business”**

#### **EDUCATIONAL PROGRAMS – (Open to all)**

##### **Strategic Growth**

###### **1. Panel discussion coordinated with the Portland Regional Chamber of Commerce and MaineBiz**

Panel discussion will be about key growth ideas from one or more businesses.

Tentatively scheduled for early June or fall 2018

Location: TBD possibly Holiday Inn by the Bay

Morning Program

###### **2. Transformational Growth Contest**

With the purpose of providing value to current and future members by learning from different diverse sources, the program will consist of four business owners from different industries and backgrounds presenting a transformational idea that led to meaningful growth in their respective company.

Each contestant will speak for 10 minutes. The format could be considered similar to “TedEx” or “Battle of the Bosses”; at the end of the presentations, the audience will vote for their favorite transformational growth idea. The prize will be a donation to the business owner’s charity of choice.

For the second part of the program, the presenters will form a panel for audience Q&A that will be moderated.

Tentatively scheduled for week of 10/29, 11/5 or 11/12, 2018

Location: TBD possibly Aura

Evening Program

##### **How To’s for Family Business Series**

Sponsored by Key Private Bank

###### **1. Internships for Maine Family-Owned Business – The Many Benefits and “How to” Success Tips!**

The IFOB will be working through this program to benefit both Maine’s young people and family businesses. In this program, Maine family business Chalmers Insurance Group will share their tips on what worked for attracting interns, onboarding the interns/program launch, and evaluations. This event aims to inform Maine family businesses who are looking at developing internship programs, as well as focus on millennials in the workplace. We will also provide local resources available for Maine family businesses who want to develop a program of their own. There will be plenty of interaction with the participants and open question and answer time. Janet Cole Cross from Cole Cross Connections and Catherine Fossett will work on the presentation along with Dottie Chalmers Cutter from Chalmers Insurance Group.

Scheduled for Thursday, March 1, 2018

8-8:30 a.m. – Continental breakfast and networking

8:30 – 10:30 a.m. – Program



Husson University, Southern Maine Campus, 340 County Road, Westbrook  
Attend in person or remote in.

## 2. The 411: HR for Companies without HR & Stories from Real Life

To those Maine family-owned businesses without an HR department or director, this program aims to serve as “HR101”. The 45-minute presentation will look to cover the basics of running human resources with topics ranging from hiring and managing employees to supervising family members. Discussion will be had on issues companies experience both under the Maine Family and Medical Leave Act and under the Americans with Disabilities Act. The presentation will be presented by Tawny Alvarez, Attorney with Verrill Dana, LLP followed by a Q&A session.

We will then lead into a discussion with the following professionals who will share real life stories of what not to do when running a family business. These panelists include:

David Ciullo – President, Career Management Associates (CMA) / Dale Carnegie of Maine  
Deborah L. Whitworth, SPHR, SHRM-SCP - Owner & CEO, HR Studio Group, LLC  
Peter Lowe – Partner, Brann & Isaacson  
Tawny Alvarez – Attorney, Verrill Dana, LLP

Scheduled for Wednesday, March 21, 2018  
8-8:30 a.m. – Continental breakfast and networking  
8:30 – 10:30 a.m. – Program  
Husson University, Southern Maine Campus, 340 County Road, Westbrook  
Attend in person or remote in.

## 3. Understanding Financials for Family Business

This program will be designed with Melinda Irish, Baker Newman Noyes, and Dean Michaud and Andrea Parker Michaud from Michaud Accounting Solutions to provide a basic in understanding of financials. It will be a collaborative approach with a comprehensive discussion of how to read a standard set of financial statements and how to analyze the information to make business decisions including real life examples from Darcy Dow, Controller at Gifford’s Ice Cream a fifth generation family-owned business. Darcy will be speaking to how she uses tools they have covered in her role.

Scheduled for Thursday, April 26, 2018  
8:00 – 8:30 a.m. breakfast and networking  
8:30 – 10:30 a.m. – Program  
Husson University, Southern Maine Campus, 340 County Road, Westbrook - Attend in person or remote in.

### SIGNATURE EVENTS – (Open to all)

1. **19<sup>th</sup> Annual Maine Family Business Awards** - Tuesday, May 15, Pre-reception 4:00-5:00 p.m. with MFBA Semi-finalists, Finalists, Sponsors and Board – Open to All - 5:00 – 9:00 p.m., with numerous sponsors at the Holiday Inn by the Bay  
Keynote Speakers: John Reny and Adam Reny, Renys



2. **Holiday Party** – Wednesday, December 12, 5:00-7:00 p.m. - Sponsored by Founding Sponsors: Verrill Dana, LLP, BerryDunn, MEMIC, TD Bank, Clark Insurance and Family Wealth Management Partners, UBS

**Family Business Spotlight / Business After Hours** – 5:00 -7:00 p.m. (Open to all)

Sponsored by Harvard Pilgrim Health Care

1. **Spring 2017** – Monday , April 9, 5:00-7:00 p.m., Rising Tide Brewing Company, 103 Fox Street, Portland
2. **Winter 2017** – Monday, October 15, 5:00-7:00 p.m., Sweetser’s Apple Barrel and Orchards, 19 Blanchard Road, Cumberland

**AFFINITY GROUPS:**

**CEO Central I** – 5-8 p.m. (By reservation only) – 4<sup>th</sup> Tuesday of the month

Location: The Woodlands Club, 39 Woods Road, Falmouth

1. February 27
2. April 24
3. July 24
4. September 25
5. November 27

**CEO Central II** – TBD Group will start in the Second Quarter of 2018

**Associate Partners TBD**

Much like our family-owned business affinity groups, we envision this being a unique group for our Associate Partners who work with family-owned businesses. We need to develop this from the Board level in 2018.

**Next Generation – 3 Peer Advisory Groups and 2 open programs**

Sponsored by Harvard Pilgrim Health Care

**Peer Advisory Groups** – 6 meetings each (By reservation only) and an open meeting for 7 total

**Executive I**

1. Thursday, February 22 – 3-5 p.m. - Husson University, 340 County Road, Westbrook – Guest Speaker
2. Tuesday, March 27 – 3-5 p.m. – Franklin Printing, Farmington – (tour earlier?)
3. Thursday, May 31 – 3 -5 p.m. - Husson University, 340 County Road, Westbrook – Concurrently “Leaders in Transition” lead by Sharon Dorsett, Dorsett Organizational Dynamics; 5-6 p.m. Social with Next Gen
4. Thursday, July 26 – 3-5 p.m. - Social at Meadowmere Resort, Ogunquit (tour earlier) with all groups
5. Thursday, October 25 – 2:30-5 p.m. – Husson University, 340 County Road, Westbrook (Possible “Leaders in Transition” concurrently)
6. Wednesday, December 5 – 5-7 p.m. – Social – All groups and new recruits – Location TBD

**Executive II**

1. Wednesday, February 28 – 3-5 p.m. – Hilton Garden Inn, 5 Park Street, Freeport
2. Wednesday, March 28 – 3-5 p.m. – Hilton Garden Inn, 5 Park Street, Freeport
3. Wednesday, May 30 – 3-5 p.m. – Hilton Garden Inn, 5 Park Street, Freeport
4. Thursday, July 26 – 3-5 p.m. Social at Meadowmere Resort, Ogunquit (tour earlier) with all groups
5. Wednesday, October 3 – 3-5 p.m. – Hilton Garden Inn, 5 Park Street, Freeport



6. Wednesday, December 5 – 5-7 p.m. – Social – All groups and new recruits - Location TBD

### Senior

1. Thursday, February 8 – 3-5 p.m. - Husson University, 340 County Road, Westbrook
2. Thursday, March 29 – 3-5 p.m. – Husson University, 340 County Road, Westbrook
3. Thursday, May 17 – 3-5 p.m. - Husson University, 340 County Road, Westbrook
4. Thursday, July 26 – 3-5 p.m. - Social at Meadowmere Resort, Ogunquit (tour earlier) with all groups
5. Thursday, October 11 – 3-5 p.m. – Old Port Specialty Tile Co. – Portland
6. Wednesday, December 5 – 5-7 p.m. – Social – All groups and new recruits – Location TBD

### Leaders in Transition

Thursday, May 31- 3-5 p.m. in conjunction with the Next Gen Executive I Group - Husson University, 340 County Road, Westbrook; 5-6 p.m. Social with Next Gen

Passing the Baton: The Emotional Side of Letting Go

Presented by Sharon Dorsett, Dorsett Organizational Dynamics

This workshop-style program will last 1.5 – 2 hours and will target owners of family-owned businesses who have hopes and concerns about the next chapter of their lives. The program will also have a focus on preparing the next generation to take over the reins from their parents, explore the level of confidence in “life arenas” (career, health, family), and tackle personal barriers to letting go as well as consequences to not doing so. We may then continue this group in October depending on the level of interest.

### Open Next Generation Programs: (Open to all)

Sponsored by Harvard Pilgrim Health Care

1. **Next Gen Social** – December 5, 5-7 p.m. – Social – All groups and new recruits – Location TBD
2. **The Art of Navigating Family Succession Planning (while still being able to enjoy Thanksgiving dinners together: Will the process of Succession be a manageable event or major crisis?)**

Presented by: Chris Yonker, Executive Coach and Business Consultant along with Mike Dow, Vice President of Dow Companies, a commercial construction company that has been in business for over 100 years

Chris Yonker will provide an approach to succession planning with self-preparation from a visual standpoint in a keynote or workshop format. His strategy encompasses the principles of leadership, personal mastery, martial arts (Chris holds a 7th degree black belt in Sanchin-Ryu Karate) and neuro-linguistic programming. In his work with wealthy families and senior executives, Chris is masterful at creating a high level of trust, which leads to extraordinary outcomes for his clients, both in business and in life. By aligning natural abilities with core values, he is able to help them define improvement initiatives, set realistic goals and use newfound strategies to achieve them.

Subjects covered include equipping the next generation to handle extreme pressures, prevent losing loyal customers, and making rational business decisions in a situation that may have emotional implications.

Scheduled for Thursday, September 13

8-8:30 am – Continental breakfast and networking

8:30 – 10:30 a.m. – Program

10:30 – 11:00 a.m. – Next Gen Groups Breakout Meeting as Follow Up

Husson University, Southern Maine Campus, 340 County Road, Westbrook



Attend in person or remote in.

**Women's Leadership Forum** – (By reservation only)

Sponsored by Key Private Bank

Location: The Cumberland Club, Governor's Room, 116 High Street, Portland

**Breakfast Group: 8:30-10:00 a.m.**

1. Tuesday, February 6
2. Tuesday, April 3
3. Tuesday, July 31
4. Tuesday, October 2

**2 - Evening Socials: 5:00-7:00 p.m.**

Tuesday, March 6 – O bag, 191 Middle Street, Portland

Tuesday, September 18, TBD

**Women in Family Business** – (Open to all)

Sponsored by Baker Newman Noyes

**1. Situational Awareness Safety Class**

This program is presented by Michael Mercer who is a Crime Prevention expert and a retired police officer. He has over 30 years in law enforcement and community policing experience. He is also a Certified Instructor through SABRE and has successfully completed the SABRE CSAP Instructor Certification Course. This program will teach our members about civilian safety awareness by providing a civilian safety plan. Attendees will learn how to identify and avoid dangerous encounters, discourage an attacker, use verbal commands for self-defense techniques, and escape an attacker. The program includes the class and 1 can of pepper spray along with social networking time.

Scheduled for Thursday, May 3 from 4-6 p.m.

The Woodlands Club, 39 Woods Road, Falmouth

**2. Find Your Focus: Master the Skill of Avoiding Distractions**

Presented by Priscilla Hansen Mahoney, Registered Maine Guide, this "Walkshop" program looks to explore the elements of designing a MAP or Motivational Action Plan to give direction. After the MAP, we'll find out what a Company Compass is and learn how to dial in your direction to stay focused. The program will last about 90 minutes.

Scheduled for Thursday, June 7 from 4-6 p.m.

Location: Gilsland Farm Audubon Center, 20 Gilsland Farm Road, Falmouth

**3. Golf** – Nonesuch River Golf Course, Scarborough

"Wine & Nine" – 6 classes on Tuesdays from 5-7 p.m. scheduled as follows:

1. July 10
2. July 17
3. July 24
4. July 31
5. August 7



6. August 14
7. August – 21 - Golf Scramble to Invite Men

**Note:** Open programs include all family business members, associate partner members and “future” members (i.e. non-members). At the Associate Partner level of membership, certain programs may be unavailable and open only to family business members (Examples: CEO Central, Women’s Leadership Forum, and Next Generation discussions.) These programs are by reservation only with Catherine Wygant Fossett, the executive director.