



Intelligence from the Inside Out

Chicago Family Business Council
Educational Opportunities
2018 - 2019

Our Community

CFBC Leadership

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Jeff Conner
BathWraps

First Vice President

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MKD Electric

Executive Director

Judy Hogel
Chicago Family Business Council

President

Sean Hoffman
Nuance Solutions

Second Vice President

Nirel Inman
Chicago Glue & Machine

Assistant Director

Elizabeth Fidanovski
Chicago Family Business Council

Strategic Partners

CFBC's mission to help our members, their companies and their families prosper is championed in part by our Strategic Partners. When you have a question or challenge, their immeasurable expertise and support is just a phone call away.



Cray, Kaiser Ltd
www.craykaiser.com



Psyched LLC
www.livepsyched.com



ODEA
www.teamodea.com



MB Financial Bank
www.mbfinancial.com



**Burke, Warren, MacKay
& Serritella, P.C.**
www.burkelaw.com



Shallcross Financial Planning
www.shallcrossgroup.com



GCG Financial
www.gcgfinancial.com



**Porcaro Stolarek Mete
Partners, LLC**
www.psmpartners.com

DePaul University

CFBC is proudly affiliated with DePaul University. Our partnership opens the door for DePaul students, our members and the business community to connect with each other. Together with the Driehaus College of Business and the Coleman Entrepreneurship Center, we aim to serve both the emerging and established professionals of Chicago through educational programs and support.

Welcome

The Chicago Family Business Council is proud to present our 2018 – 2019 educational programs. This year, it's all about serving the business of you. Whether you are working to repair, sustain, or grow your business, CFBC is where your personal and professional success go hand in hand.

Each program is designed to benefit you, your family and your company. We hope that by outlining our entire year of learning opportunities, we can help you plan ahead to achieve your goals.

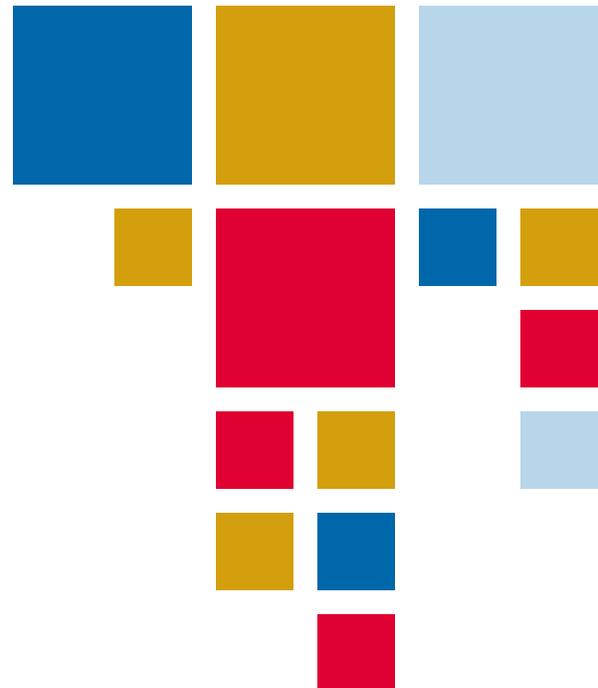


Here's a preview of this year's programs:

- Curriculum on best business practices, leadership development and strategic planning
- An award-winning keynote on GRIT: Growth, Resilience, Innovation and Tenacity
- A diverse panel on breaking generational stigmas
- A team building event designed to improve communication skills
- An educational and entertaining family movie night
- A seminar on Employee Stock Ownership Plans (ESOP) as an option for exit planning
- An interactive workshop teaching children and young adults about money

What are you waiting for?

Secure your spot today and stay up to date with us at www.chicagofbc.com/events or subscribe to CFBC news and updates at www.chicagofbc.com/contact





ROOTS

2018-2019 Roots Curriculum



SEP

28 · 2018

Cray Kaiser Ltd
1901 S. Meyers Road
Oakbrook Terrace, IL 60181

8:30AM – 11:00AM

Course Highlights:

- Management Research Group assessments and an individual coaching session
- A copy of *The Speed of Trust* by Stephen M.R. Covey
- Instructed by George Karavattuveetil of Psyched LLC

Fees:

\$1,600

for CFBC members

\$2,100

for non-members



Leadership Application Course

The Leadership Application Course improves team communication, performance and culture by providing strategies and applications that will make an immediate impact on your company.

Designed For:

Owners, employees, managers and future leaders looking to improve their leadership skills.

What You'll Learn:

This program provides a comprehensive look at six areas of effective leadership:

- **The Role of the Leader**
Communicating expectations, understanding influence and championing the company values and vision.
- **Communication**
Elements and methods of communication, earning trust and handling difficult conversations effectively.
- **Performance Management**
Rewards and consequences, defining expectations and best practices for reviewing performance.
- **Recruitment and Retention**
Best practices for compensation and benefits, creating job descriptions and selling your company to candidates.
- **Time Management**
Running productive and efficient meetings, managing priorities and decision making.
- **Organizational and Departmental Culture**
Creating a shared vision, encouraging feedback, and keeping your best people happy.

Schedule:

The Leadership Application Course meets six times over the course of eight weeks beginning on Friday, September 28, 2018. Following the first session, classes will run Wednesday mornings from 8:30am – 11:00am.

For more information and to register, please visit

www.chicagofbc.com/events/Roots-LAC

CFBC is a proud partner of Business Families Foundation (BFF), a non-profit that empowers business families to ensure their sustainability and harmony for generations to come. Through BFF, we offer our Roots Curriculum to explore topics like leadership application, strategic planning and more.

These courses have evolved based on participant feedback and will provide you with action plans and guidance so that you can implement new ideas that will foster organizational change.



Anchoring Your Business

Anchoring Your Business combines expert lectures with take-home tools to begin implementing best business practices in your organization from the top down.

Designed For:

Owners, family members and future leaders of privately-held and family enterprises.

What You'll Learn:

This program provides a high-level overview of the *12 Best Practices of Successful Businesses*, including topics such as:

- Strategic Planning
- Intrapreneurship
- The Family Business System theory
- Contingency Planning

For more information and to register, please visit www.chicagofbc.com/events/Roots-AYB

DEC

06 · 2018

Location TBD

2:00 – 5:30PM

Course Highlights:

- Take-home resources
- Transitional Preparedness Assessment included for CFBC members
- Instructed by George Karavattuveetil of Psyched LLC, Deanna Salo of Cray Kaiser Ltd, and Judy Hogel of the Chicago Family Business Council

Fees:

FREE

for CFBC members

\$250

for non-members

2019

JAN – AUG



Strategic Planning, Execution and Management



Location TBD

Course Highlights:

- Access to peer support and shared experiences
- Curated to your individual needs
- Experiential learning

Fees:

TBD

for CFBC members

TBD

for non-members

Formulating a strategic plan takes immense time, energy and patience. The Strategic Planning & Execution Course combines experiential learning, peer support and expert guidance to help plan, manage and achieve your end goal.

Designed For:

Owners, family members and key employees of privately-held and family enterprises.

What You'll Learn:

This course provides a deep dive into the thinking, building, planning, management and execution of your strategic plan. No matter where you currently stand in the process, this curriculum features:

- Analysis of where your organization currently stands in the planning process
- Creation and/or revision of your company's vision, mission and values
- Identification of strengths and weaknesses
- Formulation of immediate and long-term outcomes
- Process design and action guidelines
- Documentation and communication of your plan
- Tools to update and revise your plan

Schedule:

The Strategic Planning and Execution Course will run from January 2019 to August 2019. It will be a blend of online and in-person lessons with peers. The exact course structure is TBA.

For more information and to register, please visit

www.chicagofbc.com/events/Roots-SPE



Teaching the Value of Money: Learning to Earn, Save and Invest

JUN
01 · 2019



Many children aren't taught the value of money, thus when they have money of their own as adults, they may not understand how to spend, save or invest.

Partnering with MB Financial Bank and the Guarrine Group, we will run breakout sessions based on age to teach essential financial concepts. Younger children will learn things like the value of coins and bills. Young adults will explore more complex ideas like taxes and the effects of college loans. Following the program, families can enjoy activities at the zoo.

Designed For:

Children and young adults ages 4-18 and their families.

What They'll Learn:

- Earning money through wage, salary and borrowing
- Banking basics such as budgeting, taxes and building a savings plan
- Understanding saving vs investing
- Giving back to charity

For more information and to register, please visit
www.chicagofbc.com/events/value-of-money

Brookfield Zoo
8400 W 31st St
Brookfield, IL 60513

10:00AM – 5:00PM

Course Highlights:

- Hands-on learning
- Concepts catered to age groups
- Interactive workbook to personalize each learning experience

Fees:

\$30

for children 18 and under

\$40

for adults

GRIT: Creating a Resilient Workforce



Le Meridien
2100 Spring Rd
Oak Brook, IL 60523

4:00PM – 4:30PM

Marty Ozinga, Opening
Speech

4:45PM – 6:15PM

Paul Stoltz, GRIT Keynote

6:15PM – 7:00PM

Cocktail Reception

7:00PM – 8:30PM

Dinner & Leadership
Award honoring CFBC
President Sean Hoffman

Fees:

FREE

for CFBC members
and their guests

Non-member
registration costs vary

Growth, Resilience, Innovation, and Tenacity. Do you have **GRIT**? Does your team?

We welcome Paul Stoltz, named a top ten most influential global thinker and the world's leading expert on resilience, to deliver a keynote address on implementing the GRIT mindset.

GRIT is teachable by equipping entrepreneurs and business leaders with the tools they need to exceed their personal and professional goals. At this program, you'll learn:

- How to face challenges with GRIT
- How to implement and maintain the GRIT mindset
- The Adversity Quotient: What it is and how to improve it

Prior to Paul's keynote, we welcome Marty Ozinga, a fourth-generation leader and the current President of Ozinga Concrete. He will share the story of his 90-year-old family business and how it takes GRIT to grow from a small coal yard to a premier material supplier.

At dinner we will celebrate CFBC President Sean Hoffman's tenure on the Executive Committee from 2014 to 2018. Join us as we present Sean with the CFBC Leadership Award.

For more information and to register, please visit

www.chicagofbc.com/events/GRIT

Decades of Change: Breaking Generational Stigmas

MAY
09 · 2019



PART OF CRAIN'S SMALL BUSINESS WEEK

No one is immune from receiving their generational label. For decades, incoming generations have been stigmatized in the workforce. Millennials have received particularly harsh criticism for disrupting industries, obsessing over technology and having a poor work ethic. Soon Millennials will be old news and Generation Z will become the new target.

With each generation there are new advantages and challenges. The world is changing faster than ever before, and that can cause discomfort. In this panel, we'll discuss why generalizing groups of people, particularly Millennials, can negatively affect your organization's hiring process, performance and culture.

We will ask questions such as:

- What motivates Millennials in the workplace?
- How can we respect our similarities and differences?
- What can we do to bridge the communication gap?
- How can an organization attract and embrace A-player Millennials?

This panel is moderated by Bruce Leech, the Executive Director of the Coleman Entrepreneurship Center at DePaul University.

For more information and to register, please visit
www.chicagofbc.com/events/SBWpanel2019

Location TBD
Chicago, IL

5:00PM – 6:30PM
Panel

6:30PM – 7:30PM
Cocktails

Fees:

FREE
for CFBC members
and their guests

\$75
for non-members

SEP

19 · 2018

Location TBD
Chicago, IL

5:30PM Film
7:00PM Cocktails

Fees:
FREE

for CFBC members

NOV

08 · 2018

Hilton DoubleTree
5460 N River Rd
Rosemont, IL 60018

5:00PM Hors d'oeuvres
and cocktails
5:30PM Workshop
7:00PM Cocktails

Fees:
FREE

for CFBC members
and their guests

Non-member
registration costs vary

Taking Stock: Family Business Movie Night

We're partnering with the Coleman Entrepreneurship Center to showcase **Taking Stock**, an award-winning documentary that shares the story of two men and the complications they faced in the business of family.

Clive Stillerman is the son of a Polish immigrant and the owner of Benoni Discount Stores, a home goods shop owned by his family since the 1940s. What was once his beloved business that withstood divorce, recession and social change, Clive now jokingly refers to it as his "Empire of Dirt." His son, Ben Stillerman, would be the emerging third generation owner, but instead he became a documentary filmmaker and his family's crumbling business became the subject of his film.

Taking Stock explores the daily life connections between business and family, the family's dynamic and attempts to reinvigorate the business.

Family and friends are invited to the Coleman Center to enjoy the film, refreshments and a Q&A with Director Ben Stillerman.

For more information and to register, please visit
www.chicagofbc.com/events/taking-stock

Great Minds Think Together: A Workshop with iO Chicago

CFBC is teaming up with iO Chicago to present a fun and interactive team-building workshop. Practice essential skills like encouraging a culture of open communication and sharing ideas with your next generation leaders.

Attendees will break into groups of 15-20 people to complete exercises built to:

- Enhance teamwork and collaboration or "group mind" mentality
- Improve ability to react and adapt
- Practice supporting ideas without judgement

After the exercises, attendees will re-group to discuss how these techniques translate to business.

This program is presented by the Emerging Leaders Committee in support of their mission to foster mentorship and build generational relationships outside of CFBC Forums through educational and social events.

For more information and to register, please visit
www.chicagofbc.com/events/teambuilding

Preserving the Legacy: Exit Planning with ESOP

PART OF CRAIN'S SMALL BUSINESS WEEK

Ensuring the best plan is in place for transitioning ownership and leadership of a business can be overwhelming, especially when there are employees, family members, and vendors who all count on the business.

In this workshop, we will discuss the option of selling a business to employees using an Employee Stock Ownership Plan (ESOP). We'll learn:

- How an ESOP works and how to explore this option
- Benefits of an ESOP including an understanding of tax implications and succession planning
- How to determine if an ESOP is the right choice for you

Presented by CFBC Strategic Partners:

Elizabeth Di Cola, Managing Director of the ESOP Finance Group, MB Financial Bank
Jeff Rambach, Partner at Burke, Warren, MacKay & Serritella P.C.

For more information and to register, please visit
www.chicagofbc.com/events/ESOP

MAY

07 · 2019

MB Financial
6111 N River Rd
Rosemont, IL 60018

8:00AM – 10:00AM
Workshop and Q&A

Fees:

FREE

for CFBC members
and their guests

\$75

for non-members

Additional Learning Opportunities



Roundtables

CFBC Roundtables are opportunities for you and your employees to learn from peers and share ideas, challenges and successes in a small group setting. With the guidance of our Strategic Partners, these meetings are offered quarterly on disciplines such as HR, Sales and Finance.



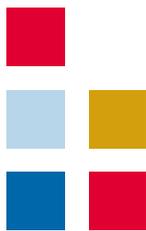
Breakfast Clubs

As timely topics arise, we host impromptu presentations with experts in that area to share knowledge and answer questions. Past Breakfast Clubs include Lean Manufacturing, the 80/20 Principle and Tax Reform.



Socials

From golf outings to boat rides on the Chicago River, we provide opportunities each year for members of the CFBC community to connect and build relationships.



Join Our Community

From joining a Forum to attending our educational programs, CFBC offers you the opportunity to learn, expand your community, and better yourself and your business. For so many leaders it's lonely at the top. CFBC members stay together at the top.

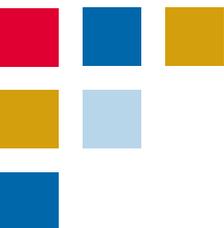
Forum

Forum is a group of nine peers who meet monthly to listen, share and learn from each other. They provide the greatest source of learning at CFBC because Forums are comprised of leaders just like you who offer unconditional support. They understand where you are coming from because they've been there too.

Committed and confidential. Share and learn with like-minded business leaders that show up for each other unconditionally.

Deeply rooted. The community of CFBC far exceeds typical business relationships, often becoming each other's most trusted advisors.

A network of support. Within and beyond Forum, community is at our core. Access to insights from CFBC peers, the Strategic Partners or resources from DePaul University extends the circle of knowledge our members rely on to grow and strengthen their organizations.



CFBC Membership



Forum placement for one individual



Connection to a community of Chicagoland's businesses who believe in the CFBC mission of supporting each other



Free admission for you, your family and your company to 25+ educational programs and workshops each year



DePaul University Continuing and Professional Education Management courses at a discounted rate



Support of eight Strategic Partners representing core business disciplines



Access to resources on the CFBC members-only website

Fees:

\$4,400

Annually

\$1,100

Add-on Membership

Each additional member from your company can join a Forum at the Add-on Membership rate.