

Family Business Series

Designed by family business. For family business.

Program offered through Mohawk College executive education series





**Register
TODAY!**

Limited seats
available

This program is designed for:

- family businesses who are facing transition
- “next gen” family business members deciding whether to join the family business, or who have just joined the family business
- family business owners looking to exit active management roles or looking to sell or transfer ownership within the family
- family businesses going through growth or other transitions

“Put the drive of an entrepreneur and passion for business together in a family that’s all in, and you get a shared experience that’s hard to find anywhere else – both the highs and the lows!”

DENNIS CONCORDIA
President & Strategic Advisor,
POWERGROUPO Resources

Introducing Mohawk’s

Family Business Series

Mohawk College’s Family Business Series offered through our McKeil School of Business, is a top-to-bottom look at the many benefits and challenges of running a family business. The program offers real, field- and family-tested success strategies specifically aimed at businesses that have to not only succeed on their own merits but live up to family values and expectations as well.

Through nine information and strategy packed workshops, you can learn how to take your family business to the next level and protect it for generations to come.

Workshop Facilitator

Workshops will be facilitated by Janice Locke, CPA, CA, Director of the Family Business Series. As a past CEO and CFO of a Family Business, Janice brings firsthand experience to the unique challenges and opportunities of Family Enterprise.

She is the recipient of both the Women of Influence and Women of Distinction Award for Business Leadership and Community Involvement. In addition to her role at Mohawk, Janice advises Family Enterprises on all aspects of Business Growth, Leadership and Success as an Independent Board Director, Advisor and Consultant to Family Enterprises. Janice also teaches executive education at the Centre for Innovation Management and Enterprise Education at Brock University.



WORKSHOP 1

All in the family. An introduction to family business.

*Participation in the workshop by
members of the Mercanti family*

May 19th, 2016

9:00 am to 12:00 pm

Lunch and networking,
12:00 pm to 1:00 pm

Guest luncheon speaker:
Sam Mercanti, Chairman of
CARSTAR Canada

SUMMARY

In this "recommended for all" introductory workshop course leaders will delve into what defines a family business and how to maximize its inherent strengths to help take your family business to the next level. We will also examine best practices for understanding the distinct roles of management, owners and family and begin to discuss tips and strategies for dealing with the inherent challenges of family businesses.

COVERING

- What defines a family business
- Three circle model: ownership/management/family
- Identify the inherent strengths and challenges of family businesses
- Roles of shareholders, family and management
- Practical examples of advantages and challenges of family businesses



WORKSHOP 2

Owning a family business. Ownership and governing models.

*Participation in the workshop by
members of the Campbell family*

*Participation in the workshop by
Virginia McKenna, LL.B, C.Dir.*

June 16th, 2016

9:00 am to 12:00 pm

SUMMARY

This workshop will look at ownership structures, governing and governance models, as well as the role of boards and family councils. A major component of the workshop will be to explore best practices around shareholder agreements.

COVERING

- Define, differentiate and understand the purposes of:
 - Board of directors
 - Board of advisors
 - Family councils
- Impact and role of founding patriarch/matriarch
- Impediments to change
- Identify best practices in creating shareholder agreements including how to exit – considerations and approaches



WORKSHOP 3

Running a family business. Strategic planning and operations.

*Participation in the workshop by
Ben Gould and Dennis Concordia*

September 22th, 2016

9:00 am to 12:00 pm

Lunch and networking,
12:00 pm to 1:00 pm

Guest luncheon speaker:
Blair McKeil, President and
CEO of McKeil Marina

SUMMARY

In this workshop we explore some leadership and management fundamentals, but from a family perspective. These critical concepts lay the foundation for the sustainability, growth and fiscal health of your family business. Transparency, planning and documentation can eliminate or solve areas of conflict.

COVERING

- Importance of guiding principles and vision
- Family constitution
- Strategic planning: purpose and overview
- Mission, SWOT, goals, actions, metrics, the human component
- What goes wrong?



WORKSHOP 4

The family chat. Communications in a family business.

*Participation in the workshop by
PJ Vermeer and Chris White*

October 20th, 2016

9:00 am to 12:00 pm

SUMMARY

Workshop four summarizes and strategizes around the communications issues families face when in business together. A 20's something son communicates quite differently than his 50's something mother or his 70's something grandfather.

COVERING

- Recognizing different personalities and communication styles to improve communication effectiveness
- Recognizing gender/generational communication style differences to improve communication effectiveness
- Recognizing how roles and relationships change over family business lifecycles
- Recognizing how underlying family values affect family business relationships
- Other issues: communication with spouses/partners/non-ownership children/indirect family members



WORKSHOP 5

I've got this. Conflict management and negotiations in a family business.

*Participation in the workshop by
Dennis Concordia, Dale McDonald
and Michael St. Jean*

November 17th, 2016

9:00 am to 12:00 pm

SUMMARY

In any business, managing conflict and a healthy approach to negotiation among stakeholders is critical to success. In workshop five we will explore how this business truth is magnified many times over for a family business where a conflict or disagreement can extend beyond the workplace.

COVERING

- Best practices for managing conflict within a family business
- Practical negotiation skills
- Understand when to manage conflict, when to negotiate and what are the differences



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WORKSHOP 6

The handoff. Succession planning, family leader steps back and the promotion of the next generation.

*Participation in this workshop by
Michael Schwenger Jr.,
Brandon and Carley Campbell*

December 15th, 2016

9:00 am to 12:00 pm

SUMMARY

Inclusion in a family business can't be haphazard. Workshop six looks at setting expectations and processes on everything from training to employment, taking a management role, leadership and, finally, ownership.

COVERING

- Early identification of timelines
- Formal policies for entering into family business employment/management/leadership/compensation
- Clear definition of roles including role of current leaders during and after succession
- Clear communication and understanding of merit vs entitlement
- Clear performance appraisal and consequences
- Roles of non-family management
- Discuss: does active participation in the management of the business affect ownership participation?
- Roles of non-active family members
- Role of spouses/partners in succession discussions/management of business



WORKSHOP 7

Family evolution. The stages of a family business and lifecycle.

*Participation in this workshop by
the McCarter family*

January 19th, 2017

9:00 am to 12:00 pm

Lunch and networking,
12:00 pm to 1:00 pm

Luncheon Guest Speaker:
John Peller, President and
CEO of Andrew Peller Limited

SUMMARY

Like any business, a family run operation will evolve as it matures in response to market changes, changing times, technology and more. In this workshop we will look into the challenges that business evolution can bring to a family business.

COVERING

- Operational and structural issues during start-up, growth, expansion, and maturity of the family business
- Discuss challenges and actions at each stage

ANDREW PELLER
— LIMITED —

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WORKSHOP 8

Succession planning. Transfer of ownership.

*Participation in this workshop by
the Mercanti and McCarter families
and Virginia McKenna, LL.B, C.Dir.*

February 16th, 2017

9:00 am to 12:00 pm

SUMMARY

There is a lot to consider in planning the handoff from one family member (or generation) to the next or sale to non-family members. There are taxation and valuation considerations; business management issues; ongoing participation of current owners. Workshop eight will delve into the complexities.

COVERING

- Early identification of timelines for transfer of ownership to the next generation (When? Partial or all at once?)
- Communication around succession – best practices
- Valuation issues
- Identify who is entitled to own shares (active, non-active, indirect family members, non-family?)
- Checklist of technical issues to consider such as trusts and taxes
- What is the participation of current owners in the business after sale
- Loans and funding issues to facilitate sale/purchase
- Pros and cons of sell vs gift of shares to next generation?
- Sale of business to non-family members
- The process, including how to value the business, how to solicit buyers, communication and technical issues

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WORKSHOP 9

A Good Business. Legacy, family values, philanthropy and foundations.

*Participation in this workshop by
the Mercanti family*

March 16th, 2017

9:00 am to 12:00 pm

SUMMARY

As with all business strategies, it's prudent to have a clearly expressed position on business legacy and philanthropy. In this final workshop, the various options and approaches will be discussed.

COVERING

- The hidden "driver" – how values influence decision making
- How to measure success in a family business
- Differentiate between creating and distributing family wealth versus protecting the business
- Branding the family name versus the business name
- Philanthropy and foundations
- Best practices around charitable giving:
 - Best practices for foundations
 - Purpose of foundations
 - Establishing and managing foundations
 - Tax, legal considerations



COST

\$149/workshop

\$999 for full series

HST not included in prices

HOW TO REGISTER

Register online at

mohawkcollege.ca/familybusiness

ACKNOWLEDGMENT OF COMPLETION

Attendees will receive a Family Business Workshop Acknowledgment of Completion, and an additional Family Business Series Acknowledgment of Completion if they attend all nine workshops.

*"Take the time to work **on** your business, not
always **in** your business."*

LISA MERCANTI-LADD

*Owner & Vice President, Southbrook Golf & Country Club
Former Executive Vice President of CARSTAR Canada*

Thank you to our founding families and guest speakers.



Top: Michael Schwenger Jr.; PJ, Peter and Joe Mercanti; PJ Vermeer; Robin, Teresa and Michael St. Jean; Sam Mercanti
Middle: John Peller and family; Lisa Mercanti-Ladd; Dennis Concordia; the McCarter family
Bottom: Dale McDonald; the Campbell family; Ben Gould and family; Blair McKeil; Chris White