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## EDUCATIONAL PROGRAMS – (OPEN TO ALL)

### “HOW-TO’S” FOR THE FAMILY BUSINESS SERIES – (OPEN TO ALL, ZOOM OR IN-PERSON)

Sponsored by: Mascoma Bank (B-Corp), Key Bank (Creativity, Virtual Selling, Diversity), the Breakwater Group (Succession), Maine HR Convention and Mainebiz

#### 1. “HOW-TO’S”: FAMILY BUSINESSES THE “ORIGINAL” B CORPS”- FIONA WILSON, UNIVERSITY OF NEW HAMPSHIRE

The program will introduce the B Corp movement, now almost 3,500 companies strong around the US and the world, and develop a deeper appreciation for why more and more companies are choosing to carefully consider and improve their impact on a diverse range of stakeholders including employees, the community and the environment. It will inform what a B Corp is and the difference between Certified B Corp and Benefit corporations. There will be a panel of family businesses that are B corps along with advisors on how to become certified and why sustainability is important to business long-term. We will also partner with Michelline Dufort, Director, Center for Family Enterprise/CEO Forum at the Peter T. Paul College of Business and Economics at UNH as a co-sponsor of this program and invite the national Family Business Alliance. The panel will be moderated by Steve Tenney, Founding Partner & CEO, Great Diamond Partners. Speakers include: Fiona Wilson, Director, Sustainability Institute, UNH, Rebecca Hamilton, Co-CEO W.S. Badger, Ben Coniff, Co-Founder, Luke’s Lobster, Mary Allen Lindeman, Co-founder/Community Builder, Coffee by Design, Paul Turbeville, Vice President of Marketing, Pete & Gerry’s Organics, Helen Coburn, Shareholder, Bernstein Shur. Sponsored by Mascoma Bank

*Themes: Strategic Planning Conscious Capitalism, Business Environment Best Practices, Consumer Trends, Growth, Leadership, Workforce Culture*

Scheduled: 8:30-10:00 am, Thursday, March 25

Location: Zoom

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

Sponsored by Mascoma Bank, HR Convention, and Mainebiz

#### 2. “HOW-TO”: BECOME A MORE CREATIVE PERSON” - DAN STEININGER

Dan contracted COVID-19 during the start of the pandemic. He credits his use of his creativity tools to help save his life. This program will teach the audience how to become a more creative person to reenergize their organization.

*Themes: Leadership, Workforce Teams, Workforce Culture, Growth, Marketing, Strategic Planning, Covid Business Resources, Business Environment Best Practices, Change, Competition, Communication*

Scheduled: 8:30-10:00 a.m., Thursday, April 22

Location: Zoom

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

Sponsored by Key Bank, HR Convention, and Mainebiz

#### 3. “HOW-TO”: SET-UP, MANAGE AND SELL IN A VIRTUAL ENVIRONMENT” DENNIS BOYLE

The program will be a combined program of the two listed below:

- a. **How To setup and manage a virtual sales team.** Attendees will walk away with the ability to attract, retain, develop, and manage a virtual sales team. This class is designed to help your company or sales leadership build and manage a virtual sales team in the new virtual environment.



- b. **Techniques and strategies to sell in a virtual environment.** Attendees will walk away with the ability to develop leads, close deals, and maintain customers in a virtual environment. This class is designed to help your company during COVID-19, and the future, to drive revenue when you cannot always be face to face with prospects.

*Themes: Growth, Customer Service, Workforce, Culture, Teams, Covid-19, Business Environment Competition, Uncertainty, Technology, Communication, Consumer Trends, Leadership, Marketing, Strategic Planning*

Scheduled: 8:30-10:00 a.m., Thursday, May 13

Location: Zoom

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

Sponsored by Key Bank, Maine HR Convention, and Mainebiz

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#### 4. "HOW-TO": DIVERSITY AND INCLUSION

The program will be a combination program of the two listed below:

- a. **Tawny Alvarez, Partner, Verrill – "Covering and Why it is Effecting the Implementation of Your Diversity and Inclusion Programs" (60 minute)**

What is Covering and What Role Does It Play in Diversity & Inclusion Programs? Attendees will gain insights into hot topics on the horizon and a look into best practices for the workplace.

*Themes: Workforce, Culture, Diversity, HR*

- b. **Maine Medical Center – "The Value of Disability Inclusive in the Workplace: A guide to understanding" (20 - 30 minutes)**

Maine Medical Center's Department of Vocational Services will be offering a webinar to discuss the value of inclusive hiring for employers. Two Employer Relations Specialist will be speaking about what hiring from a unique labor pool of qualified candidates could mean for your business. This training is meant to introduce companies to the true value that hiring people with disabilities brings to companies as well as an overview of the business case for disability inclusion. There will be a Q & A session at the conclusion of the presentation.

*Themes: Workforce, Talent, Teams, Culture, Diversity, HR, Mentoring*

Scheduled: 8:30-10:00 a.m., Thursday, June 24

Location: Zoom or in-person

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

Sponsored by Key Bank, Maine HR Convention, and Mainebiz

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#### 5. "HOW-TO": SUCCESSION PROGRAM (NO TITLE OR DETAILS YET)

*Themes: Succession, Growth, Strategic Planning*

Scheduled: 8:30-10:00 am, Thursday, November 18

Location: Zoom or in-person

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

Sponsored by The Breakwater Group, Maine HR Convention, and Mainebiz



## ONLINE SERIES – (OPEN TO ALL)

### LEGAL LUNCHES (1 HOUR 12:00 P.M. – 1:00 P.M. VIRTUAL LEGAL TOPIC DISCUSSION)

Sponsored by: PretiFlaherty and Mainebiz

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

1. **Hit Me With Your Best Shot:** Employees and Vaccinations – presented by Laura Rideout, Partner, PretiFlaherty and Jean Ginn Marvin, Innkeeper, The Nonantum Resort
2. **Never Say Goodbye:** Employee Performance Reviews, Terminations, and Alternatives – presented by Laura Rideout, Partner, PretiFlaherty and Dottie Chalmers Cutter, VP Operations, Chalmers Insurance Group
3. **Workin' For the Weekend:** Team Safety including Wage & Hour, OSHA, and Worker's Comp in a Post-COVID World presenters: John Cronan, Associate and Laura Rideout, Partner, PretiFlaherty and Mike Davis, President / Owner, IRC Industrial Roofing Companies
4. **People Are People:** The Most Challenging Employee Personas and How to Manage Them – presented by Laura Rideout, Partner, PretiFlaherty and Deborah Whitworth, SPHR, SHRM-SCP, Owner & CEO, HR Studio Group, LLC

*Themes: Business Environment, Best Practices, Change, Policy, Finance, Uncertainty, Communication, Conflict, Covid-19 Business Resources, Finance, Safety, Conflict, HR, Growth, Workforce Culture, Talent, Training*

Schedule: TBD

Location: Zoom

Cost:

## CHIT CHAT WITH CAT (RECORDED 30 MINUTE, NOT LIVE/ NO AUDIENCE, VIDEOCAST SERIES)

Sponsored by: TBD

This series will be short, 20 minutes to a half hour storytelling interviews with family business and associate partner members. We will put 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). 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

## TUESDAY TALKS (OPEN NETWORKING ONLINE SESSION, THIRD TUESDAY OF THE MONTH)

Sponsored by: TBD

The idea behind the “Tuesday Talks” is solely around networking and based on Catherine’s conversations with members. We have not been able to network, as we traditionally do, now that we are not holding in-person events. We have done some breakouts with networking in our panel programs but find people are Zoomed out, if



it goes too long. We want to make sure our associate partners and other members are still feeling the value from their membership and make this a fun, focused, networking event.

We will have a general topic that we will discuss during each networking session. The topic will be around what program we just finished and will “tee” up for our next upcoming program and/or it will be pulled from our themes that we mentioned from our surveys like: workforce, business environment, growth, etc. We hope by having an open dialogue on the timely topic, it will help recruit people to those upcoming events and allow people to network. Andrea Michaud Parker, VP Sales and Marketing for Michaud Accounting Solutions (also on our programming committee), will moderate this program.

Thursdays, 12:00-12:30 p.m.

1. March 16
2. April 20
3. May 18
4. June 15
5. September 21
6. October 19
7. November 16

## SIGNATURE EVENTS – (OPEN TO ALL)

### 1. 21<sup>ST</sup> ANNUAL MAINE FAMILY BUSINESS AWARDS

Wednesday, October 6<sup>th</sup> – Open to All - 5:00 – 9:00 p.m., with numerous sponsors at the Holiday Inn by the Bay

Keynote Speaker: Fred Forsley, Founder and President, Shipyard Brewing Company

Host: Erin Ovalle, Owner, Maine Life Media

Price: \$95 in-person; \$75 virtually and Table: \$1400 (10 tickets)

### 1. HOLIDAY PARTY

Scheduled for Wednesday, December 8, 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, Great Diamond

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

## FAMILY BUSINESS SPOTLIGHT / BUSINESS AFTER HOURS – (OPEN TO ALL)

Sponsored by Harvard Pilgrim Health Care and Blue Elephant Events and Catering

Date: TBD Monday, 5:00 – 7:00 p.m.

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

### 1. WARREN'S OFFICE SUPPLIES

- a. Spring 2021 – Date TBD, Monday, 5:00 – 7:00 p.m.

### 2. THE NONANTUM RESORT

- a. Fall 2021 – Date TBD, Monday, 5:00 – 7:00 p.m.



## **FUN AND FUNCTION (FORMALLY KNOWN AS WOMEN IN FAMILY BUSINESS) – (OPEN TO ALL)**

Series Sponsored by Baker Newman Noyes

Previously we had this series called “Women in Family Business” and have decided change this to “Fun & Function”. The title “Fun and Function” allows us to hold programs that create a break from the education series, while still addressing important topics and having fun in the process!

### **1. STEPPING UP AND STEPPING BACK: EXPANDING YOUR INFLUENCE BY FRANCIS EBERLE**

This session, with activities, will provide information to highlight concepts using the Circle of Influence to Selecting the Right People for the Right Place. The objectives are to learn about the Circles of Influence and strategies for applying it, the qualities step up step back leader and identify areas they want to grow, and why and how to put people in the right positions and some strategies to do so.

*Themes: Culture, Workforce, Leadership, Business Environment, Best Practices, Growth, Business Development, HR, Strategic Planning, Talent*

Scheduled: 4-6 p.m. Thursday, August 5

Location: Zoom or in-person

Cost: Free for members, \$35 in-person or \$15 on Zoom (future members)

### **2. EQUALITY: HAS COVID- 19 BALANCED THE GENDER SCALE?**

After a successful program discussing the gender gap, we feel this topic has enough engagement to bring it back again and include more male voices. This would be our second time running this program. The first time we had to be on Zoom so we’re hoping this one would be in-person and bring back the original panelists. We would give it a twist (by adding a male voice) and hold it in-person in the fall.

- 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
  - TBD

We also feel that it is important to have men and women at this discussion in order for the topic to properly be addressed and for change to occur. We are hoping by changing our marketing and event and column title from “Women in Family Business” to “Fun & Function”, we can be more inviting to both genders to further the discussion.

*Themes: Culture, Workforce, Business Environment, Best Practices, Growth, HR, Talent, Wellness*

Scheduled: Thursday, October 21 from 4-6 p.m.

Location: in-person, The Woodlands Club, Falmouth

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

### **3. WINE & 9 AND GOLF SCRABBLE**

**Nonesuch River Golf Course, Scarborough**

Sponsored by: Baker, Newman, Noyes



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, July 20
  2. Tuesday, July 27
  3. Tuesday, August 3
  4. Tuesday, August 10
  5. Tuesday, August 17
  6. Tuesday, August 24
  7. Tuesday, August 31
8. Tuesday, September 7, 2:00 - 8:00 p.m., Golf Scramble to Invite Men

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

## AFFINITY GROUPS:

### CEO CENTRAL

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

Location: Zoom or The Woodlands Club, Fireside Room, 39 Woods Road, Falmouth or Zoom

Price: \$65 a meeting (free if on Zoom)

Sponsored by Mainebiz

1. Tuesday, February 23 – Zoom: 6-7 p.m.
2. Tuesday, April 27 – Zoom: 5:30-7 p.m.
3. Tuesday, May 25 - TBD
4. Tuesday, September 28 - TBD
5. Tuesday, November 30 - TBD

### WOMEN'S LEADERSHIP FORUM

(By reservation only)

Sponsored by TBD

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

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

Price: \$35 (free if on Zoom)

We also have the option for two evening programs from 4-6 p.m. if we can meet in-person.

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 2 - Zoom
2. Tuesday, April 6



3. Tuesday, May 4
4. Tuesday, August 3
5. Tuesday, October 12
6. Tuesday, November 9

## NEXT GENERATION

### 4 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 and Maureen Costello Wedge of Quad Group. The Senior and Executive Blend groups are facilitated by Priscilla Hansen Mahoney of Blazing Trails Coaching.

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

**NEXT GENERATION: Senior** - This group is made up of Next Generation members who are working at the mid-management responsibility level in their company i.e. department managers / area managers.

**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 an executive role i.e. a Finance Manager moving to a GM.

**Peer Advisory Groups** – 5-6 meetings each and one open meeting for 6-7 total meetings.

## EXECUTIVE I - THURSDAYS

Price: \$400

1. Thursday, February 25 – 3-5 p.m. Zoom
2. Thursday, March 4 – 3-5 p.m.
3. Thursday, April 8 – 3 -5 p.m.
4. Thursday, June 3 – 3-5 p.m.
5. Thursday, August 19 – 3-5 p.m.
6. Wednesday, November 3 –3-5 p.m. –All groups and new recruits – Location TBD

## EXECUTIVE II - TUESDAYS

Price: \$450

1. Tuesday, February 16 – 8– 10 a.m. Zoom
2. Tuesday, March 30 – 8-10 a.m.
3. Tuesday, April 27 – 8-10 a.m.
4. Tuesday, June 22 – 8-10 a.m.
5. Tuesday, August 24- 8-10 a.m.
6. Tuesday, October 26 – 8-10 a.m.
7. Wednesday, November 3 –3-5 p.m. –All groups and new recruits – Location TBD



### EXECUTIVE BLEND - WEDNESDAYS

Price: \$450

1. Wednesday, March 3 – 3-5 p.m. Zoom
2. Wednesday, March 24 – 3-5 p.m.
3. Wednesday, April 28 – 3 -5 p.m.
4. Wednesday, June 30 – 3-5 p.m.
5. Wednesday, August 25 – 3-5 p.m.
6. Wednesday, October 13 – 3-5 p.m.
7. Wednesday, November 3 –3-5 p.m. –All groups and new recruits – Location TBD

### SENIOR - WEDNESDAYS

Price: \$450

1. Wednesday, February 24 – 3-5 p.m. Zoom
2. Wednesday, March 17 – 3-5 p.m.
3. Wednesday, April 21 – 3 -5 p.m.
4. Wednesday, June 9 – 3-5 p.m.
5. Wednesday, August 18 – 3-5 p.m.
6. Wednesday, October 20 – 3-5 p.m.
7. Wednesday, November 3 –3-5 p.m. –All groups and new recruits – Location TBD

### LEADERS IN TRANSITION - MONDAYS

(By reservation only)

Location: Zoom or The Woodlands Club, 39 Woods Road, Falmouth

Price: \$150 overall or \$50 per session

1. Monday, April TBD – 5-7 p.m.
2. Monday, TBD – 5-7 p.m.
3. Monday, September TBD – 5-7 p.m.

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 will start the discussion by sharing successes and challenges from their own personal experience. They will then 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)

Sponsored by Harvard Pilgrim Health Care

**TBD Next Gen Recruit Program for 2022 groups.**