

SHIDLER COLLEGE OF BUSINESS
FAMILY BUSINESS CENTER OF HAWAI'I

BLOCKING
AND
TACKLING | COMMUNICATING
EFFECTIVELY TO WIN
THE FAMILY BUSINESS
GOVERNANCE GAME

13TH ANNUAL RETREAT
SEPTEMBER 20 – 21, 2019 • MOANA SURFRIDER

FACILITATORS



DANA TELFORD
Principal Consultant
The Family Business
Consulting Group



**NICOLE BETTINGER
ZEIDLER**
Consultant
The Family Business
Consulting Group

DAY 1 • FRIDAY, SEPTEMBER 20

TIME	EVENT	DETAILS
8:30–9:00 AM	Registration	Ballroom Foyer (Continental Breakfast)
9:00–9:15 AM	Welcome Remarks	Ballroom
9:15–10:00 AM	Family Introductions	
10:00–10:30 AM	Focused Table Discussions Question 1: Should owners give, sell, or combo shares to successors? Question 2: Dividing profits. What % to owners, managers, reinvest? Question 3: What combination of age and work experience = leadership?	
10:30–10:45 AM	Break	
10:45–11:15 AM	Back with Family Groups Review results from table discussions Breakdown: How does current generation see things? Next generation? What does this mean for our own transition? Where are our blind spots?	
11:15 AM–12:00 PM	Communication Stumbling Blocks and Hurdles in Family Business Communication Activity	
12:00–1:00 PM	Networking Lunch	Buffet
1:00–1:15 PM	Review Retreat So Far	
1:15–2:15 PM	Current Generation and Next Generation Breakout Session	
2:15–2:30 PM	Breakout Session Debrief and Action Planning, Clearing our Own Hurdles	
2:30–2:45 PM	Break	
2:45–4:00 PM	Family Business Governance and Introduction to Family Constitutions Utilizing Governance to Overcome Communication Gaps Family Business Governance Activity	
4:00–6:00 PM	Networking Reception	Beachhouse

DAY 2 • SATURDAY, SEPTEMBER 21

TIME	EVENT	DETAILS
6:00–8:30 AM	Breakfast at your Leisure	Vouchers for the Veranda are in your name tag
8:30–8:45 AM	Welcome/Housekeeping	Ballroom
8:45–9:00 AM	Review of Day 1	
9:00–10:00 AM	Family Constitution as a Key to Success	
10:00–10:15 AM	Break	
10:15–11:15 AM	Panel: Making Progress through Constitutions and Governance <ul style="list-style-type: none">• Chad Bloom, Vice President, The Zelinsky Company• Sarah Bow, President and COO, Bow Engineering & Development, Inc.• Guy Kamitaki, Treasurer, HouseMart	
11:15–11:45 AM	Activity and Action Steps	
11:45 AM–12:00 PM	Open Discussion	
12:00–12:30 PM	Wrap Up/Closing Remarks	
12:30 PM	End	

NOTES

ACTION PLAN

