

Family Meetings Workshop

Business Families Centre



“Governance in family business is a set of forums for discussing relevant issues, sharing information and making decisions with the ‘right’ voices in the process.”

- Wendy Sage-Hayward

Family Meetings Workshop

Regular family meetings are frequently cited as one of the key contributing factors to family business longevity and success. This half-day workshop will provide you and your family with practical tools to understand, introduce, or improve family meetings, which are one of the simplest, yet most effective, forms of family governance. You will identify how to overcome common hurdles to initiating family meetings, and engage with best practices for achieving open dialogue on important issues.

Format

The half-day Family Meetings Workshop includes three key components: education, discussion, and practice. Family governance theory is blended with applied learning activities to maximize the educational experience and provide participants with concrete takeaways. Faculty-led conversation is used to introduce core concepts, which participants then apply to real scenarios and their own family circumstances during activities and discussion.



FAMILY MEETINGS WORKSHOP
COURSE DATE: Contact us for dates
FEE: \$325.00 + tax

Core Teachings and Takeaways

- Define what “governance” means for the family, the business, and the owners
- Identify and explore different types of family governance structures (family meetings, family assembly, family council)
- Define what a family meeting is and its benefits
- Describe the family meeting process, identifying common roadblocks and solutions
- Analyze family meeting logistics, including the ideal frequency, duration, and location of the meetings
- Learn how to set family meeting agendas according to the stage of the family business and family dynamics
- Explore who to include in family meetings
- Discover topics to discuss at your next family meeting
- Contrast meeting leadership from family or business leadership
- Plan for your family’s next (or first!) family meeting

Audience

This workshop is at a fundamental level and does not require previous family governance knowledge. It is particularly useful for families looking to introduce or improve family meetings.

Family members may attend individually or alongside other members of their family. The workshop is suitable for all family members, whether active in the business or not. Enrolment is restricted to members of family firms.

Faculty

WENDY SAGE HAYWARD



Wendy is an adjunct professor at the Sauder School of Business with over 25 years of experience in working with business leaders and family firms. Recognized as a thought leader in creating educational experiences for business families, Wendy has worked with the Business Families Centre to develop and deliver a number of programs for family firms and their professional advisors. In particular, she facilitates multi-generational conversations on firm continuity, next generation preparation, and governance. A member of a century-old family enterprise herself, Wendy is one of the directors of the board of her family enterprise, which has over 40 partners in the cousin consortium stage.

Business Families Centre

Since 2001, the Business Families Centre has helped business families to address their most complex challenges. Working at the intersection of family enterprise and business acumen, Sauder's Business Families Centre advocates education as the central path to success for all enterprising families. The Business Families Centre is an unrivaled resource for every issue relevant to the family enterprise, including governance, relationship management, wealth preservation, intergenerational transitions, and next generation leadership.

Program Support



ENROL OR LEARN MORE:

To find out more about this course and the Business Families Centre at UBC Sauder School of Business, please contact us at:

604-822-0102 | bfc@sauder.ubc.ca

or visit www.sauder.ubc.ca/bfc