

# Family Enterprise Programs

**Educating and Inspiring Generations  
of Enterprising Families**

Family Enterprise Boards  
Forming Family Enterprise Governance  
Governing Family Enterprises  
Leading for Impact within Family Enterprise  
The Single Family Office

# Kellogg's Family Enterprise Suite of Programs

As enterprising families throughout the world transition to new generations of leaders, their success and continuity depends on the management and leadership effectiveness of those at the top. The John L. Ward Center for Family Enterprises at Kellogg has developed a comprehensive curriculum that will help established, new and aspiring family business leaders master the concepts and skills required to navigate the intricacies of these complex organizations.

These four programs cover the full gamut of management issues — from family business strategy, governance and succession planning to multigenerational continuity, family offices and councils, and family business culture. Guided by our outstanding Kellogg faculty, all of whom are experts in family business practice, your learning experience will include interactive lectures, case studies and group discussions with peers facing family business challenges similar to yours.

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## Learn from Kellogg's World-Renowned Faculty



**Jennifer Pendergast**  
Academic Director;  
John L. Ward Clinical  
Professor of Family  
Enterprise and Executive  
Director of the John L.  
Ward Center for Family  
Enterprises



**Ivan Lansberg**  
Academic Director;  
Adjunct Professor,  
John L. Ward Center  
for Family Enterprises



**Brooke Vuckovic**  
Academic Director;  
Clinical Professor of  
Leadership



**Tim Kelly**  
Academic Director;  
Adjunct Lecturer of  
Family Enterprises

# Family Enterprise Boards

## Navigating Unique Governance Challenges

Feb. 1-19, 2021 | Live Virtual || Sept. 19-23, 2021 | In Person: Evanston, IL  
[kell.gg/kxfamboard](https://kell.gg/kxfamboard)

This program empowers current and future directors of family-controlled organizations to navigate the uniquely complex system of a family enterprise. Learn how to design, engage and lead family business boards to leverage the strategic advantages of your organization while managing the strategic, fiduciary and communication functions of the board and understanding the nuances of orchestrating board committees.

**“Kellogg excels at the ‘breadth and depth’ of contemporary board issues and opportunities [that are] very relevant for families and owners. A voyage of discovery into the realm of possibilities to refresh and revitalize our Board of Directors and interaction with a multi-gen family and global business.”**

OWNER, TAUCK, INC.

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### Key Benefits

- Define the role of the board in understanding family business strategy
- Explore the differences in board decisions for a family enterprise
- Understand the unique challenges of selecting family and non-family directors
- Learn to effectively link the board with the family

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### Who Should Attend

- Current family and non-family board directors, trustees and chairs of family-controlled firms
- Family members developing themselves for future roles as board members in their enterprise
- Family and non-family executives who interact with or who will soon be appointed to the board



# Forming Family Enterprise Governance

## Creating Structures and Processes to Ensure Success and Continuity

March 8–24, 2021 | Live Virtual

[kell.gg/kxfameg](https://kell.gg/kxfameg)

One of the most critical times in a family enterprise evolution is moving from the processes, people and structures that proved successful for a controlling owner to those that support a sibling partnership. Providing your stakeholders with education on governance can increase your confidence that you will have the latest insights, and can move forward with the right systems that fit your stage and needs. This program is focused on what skills leaders need to design appropriate governance architecture, lead effective decision-making across all stakeholders and set a vision that will guide multi-generational continuity.

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### Key Benefits

- Learn the governing structures families must consider to promote multi-generational continuity
- Understand the heterogeneity of each stakeholder in family enterprises — family, owner and management
- Appreciate the unique challenges of operating in the sibling stage of ownership as well as the requirements to transmit the business beyond this stage
- Acquire tools and language to put these concepts in action with the rest of the family
- Learn from other families in a similar stage of evolution through exposure to other participants and cases

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### Who Should Attend

- Members of enterprising families and non-family executives with businesses in the founders and/or sibling stages of growth. Consultants or advisors are not eligible unless attending with a family member.



**“This program provided an excellent overview of the issues surrounding early governance formation and transition in family business. Each time that members of my family or I take time away to wrestle with these issues, I have inevitably noticed growth and change in a positive direction for our family and our business.”**

FAMILY MEMBER AND NEUROLOGIST, CENTRE FOR NEURAL SKILLS



# Governing Family Enterprises

## New Insights and Skills for All Involved in the Family Business

April 12–30, 2021 | Live Virtual || Oct. 3–7, 2021 | In Person: Evanston, IL  
[kell.gg/kxfamgov](https://kell.gg/kxfamgov)

This highly collaborative program explores the specialized knowledge and skills unique to the effective governance of a complex family enterprise. You will learn to differentiate between the roles and responsibilities of owners, family members, independent directors and executives; develop new governance and leadership skills; and be energized and equipped to define the future of the family enterprise with confidence.

**“This is a very comprehensive and insightful program on what makes great family companies great. You’ll learn about the importance of acknowledging independence between owners, management and family and how these dynamics work.”**

CHIEF COMMUNICATION & CORPORATE  
RESPONSIBILITY OFFICER, JERONIMO MARTINS



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### Key Benefits

- Define the roles and responsibilities of owners, directors, board chairs, the executive team and the family council
- Improve your board’s effectiveness
- Understand critical governance policies needed to sustain the relationship between the enterprise and the family
- Learn how a common vision can unite family owners in a long-term commitment to continuity
- Explore how governance can be used to gain trust among family owners, directors and top management
- Leverage governance as a key competitive advantage of family business

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### Who Should Attend

- Family and non-family directors, CEOs, board chairs and trustees of family-controlled firms. The enterprise must be 3rd generation or beyond, with a significant number of family owners and minimum annual revenue of US\$100m with a preference for \$500m or above
- Family members involved in governing their family councils, family office or their family foundations
- Family shareholders

# Leading for Impact within Family Enterprise

Formerly named  
Leading Family  
Enterprises

## A Personal Approach

May 3-14, 2021 | Live Virtual

[kell.gg/kxfamlead](https://kell.gg/kxfamlead)

As an aspiring family enterprise leader, you'll discover how to establish your credibility and authority in the business community, among family shareholders, and with the board and management team. As an established leader, you'll explore the complexities of mentoring the next generation, and of managing succession and letting go. With insights gained from a 360-degree assessment and personalized individual and group coaching, you'll leave better able to meet the personal, familial and organizational challenges of your dynamic enterprise.



**“Incredible learning and development experience. The faculty were world class and content was spot on. This is giving me the best foundation to develop as a next gen family leader.”**

VP, DIAMOND CONSULTANTS

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## Key Benefits

- Articulate a detailed vision for the future of the family, the enterprise and for your own leadership role
- Learn to communicate your vision and imbue it with the significance and purpose needed to engage your family and your employees
- Understand the fundamental importance of emotional intelligence for successfully leading in senior roles
- Learn to manage the unique dilemmas that confront family enterprise leaders in ways that harness the strategic advantages of these organizations
- Learn to manage generational transitions and to collaborate effectively with your seniors, juniors and generational peers
- Discover how best to constructively influence the many stakeholders of a family enterprise
- Discuss the special challenges and skills needed to earn trust and authority as a leader of a family enterprise
- Master working effectively with the board of directors, shareholders, management and the family

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## Who Should Attend

- New or emerging leaders of an enterprising family
- Established family and non-family leaders in roles such as: board chair, CEO or CEO candidate, family council chair, family foundation chair, family office head, family director or trustee

# The Single Family Office

## Maximizing Performance in a Complex Environment

October 25–27, 2021 | In-Person: Chicago, IL

[kell.gg/kxfamoff](https://kell.gg/kxfamoff)

Challenging, often subtle family dynamics, sensitive communications, and interlinked governance structures all contribute to the complexity of family offices. You will learn to navigate complex family office dynamics to more fully align stakeholders. You will develop skills to plan strategy, promote trust and communication, and address challenging issues around governance and continuity.

**“The challenges presented in leading a single family office are unique, due to centrality of family members as owners, clients, and board members. The Single Family Office (SFO) program addresses the critical skills a SFO leader needs to meet these challenges. The program offers a rare opportunity for you and your SFO peers to learn the skills to better lead your office and enhance value to family clients from Kellogg professors with deep family enterprise experience.”**

TIM KELLY, CO-ACADEMIC DIRECTOR

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### Key Benefits

- Understand and address family dynamics that affect and impede family office functions and processes
- Gain skills to promote trust-building positive interactions among family office stakeholders
- Learn practical insights about family, family business, and family office governance
- Develop strategic planning skills related to continuity, succession, outsourcing, and other areas
- Share insights with other family office leaders, while learning from their experience

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### Who Should Attend

- Senior executive leaders of single family offices. Typically, these executives are non-family members. These executives will lead multidisciplinary family office teams that serve the needs of sophisticated multi-generational family offices.





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## Immerse Yourself in the Incomparable Kellogg Experience



The family enterprise program suite is shaped by the rigorous learning, accessible faculty and outstanding networking opportunities that define the Kellogg culture of teamwork and collaboration — an immersive, interactive learning experience unavailable elsewhere.

Developed and led by world-renowned faculty, the instructional methodology stimulates new thinking and encourages you to reexamine and reformulate your professional and personal goals and strategies. An emphasis on peer and faculty interaction intensifies the learning experience, promotes the informal exchange of ideas and fosters rewarding relationships that can last a lifetime.

These programs are limited to individuals with specific experience. All applications will be subject to review and approval from the program's academic director.

Fees for programs held on our Evanston campus include classroom instruction, program materials, accommodations, meals, coffee breaks and receptions. Chicago campus program fees do not include accommodations.

*Groups of up to five participants from a family enterprise can be accommodated in each session. Requests for groups of more than five in a single session must be approved by the program's Academic Director. Please direct your inquiry to the John L. Ward Center for Family Enterprises at [c-bath@kellogg.northwestern.edu](mailto:c-bath@kellogg.northwestern.edu).*



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### Kellogg Executive Education Live Virtual Programs feature

- Live Online Learning — Delivered in our live virtual classroom, with a limited number of participants to ensure maximum engagement
- Top Kellogg Faculty — Kellogg's renowned thought leaders will share their knowledge and facilitate thoughtful discussion in real time throughout the program
- Peer-to-Peer Connections — Many opportunities to interact with your global peers through both formal and informal activities
- A Rich, Interactive Experience — A high-quality, transformative learning experience with timely, actionable content and seamless interactivity
- Credit towards a Kellogg Executive Scholar Certificate — All our live virtual programs count towards completion of your certificate

### Learn more and apply

Website:

[kell.gg/kxfambiz](http://kell.gg/kxfambiz)

Consult with an advisor:

**847.467.6018**

[execed@kellogg.northwestern.edu](mailto:execed@kellogg.northwestern.edu)

**Northwestern**  
**Kellogg**  
School of Management

847.467.6018 [ExecEd@kellogg.northwestern.edu](mailto:ExecEd@kellogg.northwestern.edu)

James L. Allen Center | 2169 Campus Drive | Evanston, IL 60208

[kell.gg/kxbexeced](http://kell.gg/kxbexeced)

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