

11th Annual



**SCHLESINGER GLOBAL
FAMILY ENTERPRISE
CASE COMPETITION**

January 10 - 13, 2024



JUDGES PROFILE BOOKLET



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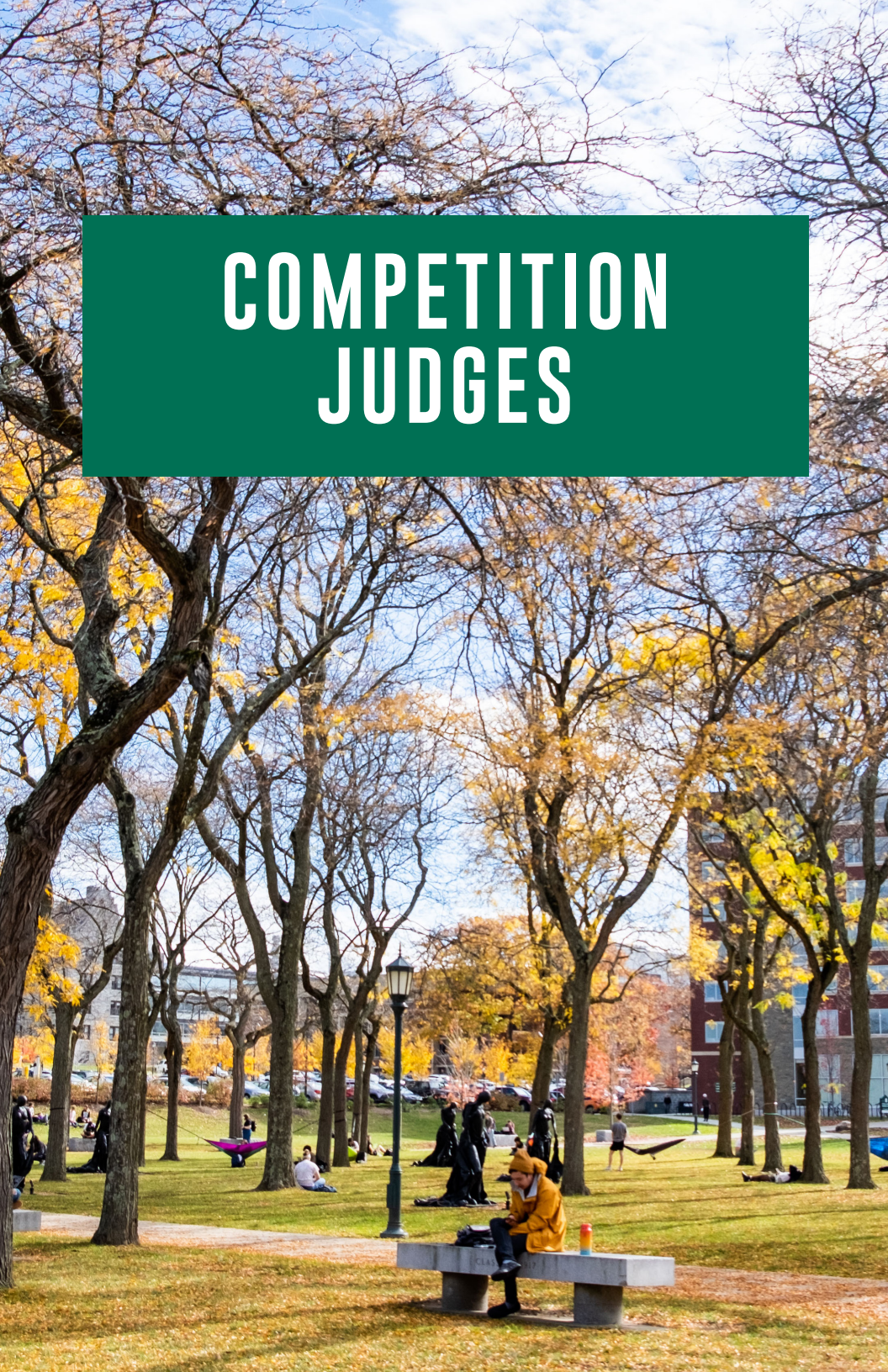
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COMPETITION JUDGES



Matt Allen

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Dr. Matt Allen is the John L. Ward Clinical Professor of Family Enterprises and Executive Director of the Ward Center for Family Enterprises. His expertise is in the area of family learning, family entrepreneurship and the development of the next generation. Professor Allen has taught entrepreneurship and family entrepreneurship courses at the undergraduate, graduate and executive levels. His teaching approach has earned him numerous awards and invitations including the Poets and Quants Best Undergraduate Business Professors for 2020. At the executive level, Professor Allen has worked with audiences across the globe with a special interest in Middle Eastern, Asian and Latin American markets.



Denise Alosa

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New England Kenworth, NH

Denise is currently President and Dealer Principal of New England Kenworth, a family owned and operated network of truck dealerships in Maine, New Hampshire, and Vermont. This 100 year-old business provides truck sales, service and parts for heavy and medium duty trucks serving the Northeast with 8 locations and over 350 employees. New England Kenworth is the largest truck dealership group in New England. The business was the recipient of the 2017 UVM Family Business Award for the Multi-Gen US-Based Family Enterprise Category. Denise, a third-generation family member, specializes in the parts and service areas of the dealerships. The fourth generation has recently joined the business. Before joining the family business, Denise enjoyed a career in Sports Medicine for 25+ years as an athletic trainer. She continues to consult and work in this arena as the Medical Director for the People's United Bank Vermont City Marathon and to the Vermont Department of Public Safety. She graduated with a Bachelor of Science degree from UVM in 1985, and has a Master's degree from UNH.



Reena Atanasiadis

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Williams School of Business



Reena Atanasiadis is the Dean of the Williams School of Business. She brings over two decades of wealth management and finance experience to her university. Her areas of academic interest include Behavioral Finance, Corporate Finance, Portfolio Management and Financial Institutions Management. Prior to her arrival at Bishop's, she was the Director of the John Molson's School of Business MBA in Investment Management. As a senior lecturer in Finance, she received the Dean's Award for teaching excellence at the Graduate level and served as Director of the Kenneth Woods portfolio management program, an innovative initiative through which undergraduates actively manage a \$2.85 million portfolio. With significant expertise in the areas of AACSB accreditation, student-led portfolio management programs, case competition coaching, faculty development, online / hybrid learning and executive education, she has acted as a consultant to universities, organizations and businesses.

Ali Azouz

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Ali Azouz Ph.D. is Professor of Entrepreneurship and SME Management at the Université of Québec at Montréal (UQAM), Quebec, Canada. He has over 15 years' experience in SME management consulting in Quebec and around the world. His research interests include qualitative research on resilience, innovation, organizational justice, the psychology of emotions, and the education and preparation of next generation family business leaders.

Alexander Bergfeld

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Courage Partners Group, Singapore



Alexander F. Bergfeld is the General Manager of Courage Partners Group in Singapore. Courage is a privately held consultancy, advising the top echelon of business families in Europe, Southeast Asia and the Americas. Prior to joining Courage, Alexander advised and consulted corporate business acceleration programs in Europe, and managed ground-breaking clean-tech projects on the Arabian Peninsula. He is a member of the European Commission Expert Evaluator Group, author of the book "Business Acceleration 2.0" and several other academic articles on family business. Alexander was awarded the "Best Coach" in 2017 at the Family Enterprise Case Competition in Vermont and acted as the Lead Judge in 2018 at the first "Asian Family Business Case Conference" in the Philippines. Alexander holds an M.B.A. (Munich Business School, GER), a B.Sc. (University of Manchester, UK), and is pursuing a PhD on the role of capabilities in ownership succession processes in Southeast Asian Business Families (University of Antwerp, BEL). In his free time, Alexander is a passionate martial artist who holds a blackbelt in Kali Eskrima / CQC and a two-stripe blue belt in Brazilian JiuJitsu.

Mira Bloemen-Bekx

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Dr Mira Bloemen-Bekx is Professor of Regional Innovative Capacity at the Hanze UAS, Groningen, Netherlands. Mira's dissertation on next generations' engagement and commitment from Hasselt University, Belgium, received the prestigious 'Best Doctoral Dissertation Award' of the Family Firm Institute, USA, in 2020. Mira has enjoyed a distinguished career as an entrepreneur and strategic marketing consultant for SMEs and family businesses and as a lecturer, head of department and dean in higher education. Her academic interests focus on value-driven approach to leading family enterprises, and she focuses on developing ownership competences, impact-driven innovation and ecosystems. Mira serves as the chair of Case Selection Committee and the Judge Orientation Leader of the SG-FECC.

Elise Brunelle

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Vermont Symphony Orchestra



In 2020, Elise Brunelle was appointed Executive Director of the Vermont Symphony Orchestra, the state's only professional orchestra, now in its 89th season. She came to Vermont from South Africa, where she led the country's largest non-profit performing arts organization, Cape Town Opera, for 16 years. Under her leadership, Cape Town Opera toured to the Middle East, Asia, Europe and Africa and produced 16 new South African operas. Growing up in Minnesota with her father, a conductor, and as a former violinist herself, Brunelle had a lively background in music. Before her career overseas, Brunelle also held leadership positions at the University of Minnesota School of Music, Guthrie Theatre in Minneapolis, and Walnut Street Theatre in Philadelphia.

Patrick Buckley

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Managing Director of EPS Group



Patrick has over 27 years of experience working within the water sector in Ireland, the United Kingdom, and the Middle East. He has been a director and shareholder representative on the group board since 2008, was appointed Deputy Managing Director in May 2012 and Managing Director in September 2016. Patrick is married to Julieanne and has two daughters Ava 13, Beth 12 and a son Ryan 8. Patrick is an active Triathlete and enjoys competing in middle- and long-distance triathlons as well as cycling and open water swimming. Patrick has experience of working in both the private and public sectors and was an elected member of Cork County Council from 1999 to 2009. During these two terms Patrick served as Chairperson of various committees focusing on waste management and water quality as well as a director in a local rural development company in county cork. Patrick also currently serves in a voluntary capacity as a director in a local not for profit community owned childcare centre having been one of the founding directors in 2007. Patrick is actively involved in the promotion of skills development with the Southwest region of Ireland (Cork and Kerry) and currently Chairs the executive forum of the regional skills forum working with the educational providers and industries within the region. Patrick is also Chair of the Water Services Operators Group in Ireland who represent the private Design, Build and Operate companies promoting the sustainable ongoing development of water services and infrastructure in Ireland.

John Burton

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Stormsey Associates LLC



John is currently the President of Stormsey Associates, a Vermont based consulting firm working with business leaders and communities around issues related to economic development. He is the Director of Research at the Vermont Futures Project where he develops economic data and policies to improve state-wide economic performance. John also consults with the Distributed Ledger Governance Association around distributed ledger pilots, project planning and legislation. He is the Chair of the South Burlington Economic Development Committee and serves on several business association boards. John was the former Founder and President of NPI Technology Management in South Burlington Vermont where for over 30 years he consulted with business executives around technology budget and planning.

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Amazon



Enerino "Rino" Caruccio is currently Vice President Insights Planning & Technology (IPAT) for Amazon Devices & Services, responsible for developing, implementing and delivering insightful analysis that scales with the growth of Device & Services portfolio. Rino joined Amazon in March 2006 as Vice President Corporate FP&A and in 2009 became Vice President Worldwide Seller Services Finance. In 2013 he became Vice President Worldwide Consumer Analytics before moving to his current Amazon role in 2017. Prior to joining Amazon, Rino worked 22 years for General Electric, joining the Financial Management Program in 1984 and then GE Corporate Audit Staff. After earning his MBA in 1991, Rino moved to London as a financial analyst for GE International. In 1993, he became Finance Manager for GEM.

Michael Casella

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Casella Waste Systems



Mr. Casella brings broad experience in both the private and public sectors, particularly in the field of Waste and Recycling. Mr. Casella has been a member of numerous industry-related and community service-related state and local boards and commissions, including the Green Up Vermont, Vermont Chamber of Commerce, National Waste & Recycling Association's Future Industry leader association, Wheels for Warmth. Mr. Casella is also a recipient of the waste 360 – 40 under 40 award for his work in the industry. The waste360 "40 under 40" awards program recognizes inspiring and innovative professionals under the age of 40 whose work in waste, recycling and organics has made a significant contribution to the industry. Mr. Casella holds a Bachelor of Science in Business Administration from West Virginia University.

Ted Castle

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Rhino Foods



Ted Castle is the owner and President of Rhino Foods, a certified B Corporation located in Burlington, VT. Rhino employs 250+ people and manufactures bakery-style inclusions for ice cream manufacturers and a variety of frozen desserts and snacks. Rhino Food's Purpose is to "Impact the Manner in Which Business is Done". Rhino Foods and Ted have been recognized with the Hal Taussig B the Change Award, Beta Gamma Sigma Entrepreneurial Award, Vermont Small Businessperson of the Year, the Terry Ahrich Award for Socially Responsible Business, Forbes Magazine's List of Small Giants, Optimas Award for vision in the workplace, Inc Magazine's Entrepreneur of the Year Award, and Special Recognition Award from the Vermont Refugee Resettlement Program.

Thomas Clark

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Family Enterprise Canada



Growing up in a family business, Thomas is acutely aware of the strategies, dynamics, and structures needed to run an effective family business system. As National Director of Content Development and Resources at Family Enterprise Canada, Thomas's focus is primarily on developing thought-provoking education and conducting relevant research for business families and Family Enterprise Advisors (FEAs). Leveraging an understanding of where education and technology can best meet to provide the most modern and interactive learning experience, while also incorporating families, advisors, and academics alike in his educational development process, he has helped Family Enterprise Canada become the go to resource for all things family business in Canada.

Matthew Cropp

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Vermont Employee Ownership Center



Matthew Cropp is Executive Director of the Vermont Employee Ownership Center, an organization he has worked for since 2014. He has advised hundreds of business owners on succession planning, and worked with numerous employees seeking to purchase their workplaces. He received his MA in History from UVM in 2011, and lives in the New North End of Burlington with his wife Allison and their young son.

Jay Daniel

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Lodge Cast Iron



Jay Daniel is a 5th generation member of the Lodge family and a Shareholder Director. Elected to the Lodge Board of Directors in 2007, Jay has served or chaired several committees which have helped navigate transitions in executive leadership and board composition. Jay is also founder and CEO of Intechrate Systems, an IT Services provider based in Sarasota Florida. The company has provided technical expertise to small and medium-sized businesses since 2001.

Rocki-Lee Dewitt

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Grossman School of Business



Dr. DeWitt is a Professor of Management at the Grossman School of Business, University of Vermont. She received her Ph.D. in strategic management from Columbia University. An award-winning scholar and teacher, her research, teaching and consulting supports leadership and stewardship of land-based family enterprises. From her experiences growing up on a family farm in New York to study of family/non-family workplace dynamics on Ohio dairy farms, professional experience as an advisor to and leader of performance-challenged enterprises, to current studies of terrorism and bankruptcy in land-based industries and regenerative agriculture, Dr. DeWitt focuses on identifying, understanding and addressing organizational, market, and institutional failures and readying next generation leaders for those challenges.

Catherine Faherty

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Dublin City University Business School



Dr. Catherine Faherty is an Assistant Professor of Enterprise at Dublin City University Business School, Ireland. She is co-founder and Associate Director of the DCU National Centre for Family Business. Catherine earned her PhD from DCU Business School in 2018, where she was a recipient of the prestigious Irish Research Council Postgraduate Scholarship. During her doctorate, she held visiting Research Fellow positions at Northwestern University, USA and Northeastern University, USA. Following her studies, Catherine joined the Kellogg School of Management, Northwestern University, USA, where she was a Postdoctoral Fellow at the Kellogg Center for Family Enterprises. Catherine's research focuses on trust dynamics in family firms. Her research has been published in a variety of peer-reviewed scholarly outlets, including *Entrepreneurship Theory and Practice*, and her work is regularly presented at leading international conferences.

Davis Farmer

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Ulysses Advisory Group



Davis Farmer is an entrepreneur in the life sciences. He has extensive experience with technology transfer, company formation, deal formation, and corporate governance. He has executed on transactions in China, Japan, Europe and the Americas. He has established companies in the US, UK, New Zealand and Russia, and has done business in Turkey and Argentina as well. His current focus is on developing a novel platform for vaccine discovery that activates all components of the immune system.

Ryan Foley

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Foley Inc.



Ryan Foley, Director at Foley Incorporated. Third generation owner of the Caterpillar tractor dealer for New Jersey, Metro Philadelphia area, Staten Island, Ny, New Castle County, Delaware, and Bermuda. Foley Inc is a Values Based Leadership firm. A journey that began in 1997 and helped us transform our business. It shaped the way we interact within our organization, with our customers and our stakeholders. Our success since 1997 has been unparalleled and directly related to this change. In 2013 participated in an executive program hosted by Caterpillar and facilitated by the professors at the Stanford Graduate School of Business. Since 2012, an active board member for HEART 9/11, a group of PAPD, NYPD, FDNY individuals that bonded after the September 11 attacks and respond immediately to natural and man-made disasters; Rebuild community centers in hard-hit areas and recover by building resiliency for individuals, families, and communities. Currently working with two classmates from UVM to grow and scale a new fuel additive for gas- and diesel-powered vehicles that drastically reduces the amount of CO2 released into the atmosphere. Teton Village, WY is where we call home and married to Emily and father to Marley (8), Hollis (7) and Hayes (8 months). "Doing the right thing is never the wrong thing" – Ted Lasso.

Nancy Forster-Holt

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University of Rhode Island



Lead Faculty Fellow in innovation and Aging Faculty Fellow Nancy Forster-Holt, PhD, MBA, CMA, RFG, is Clinical Associate Professor in the College of Business. At URI, she developed the interdisciplinary Innovation and Entrepreneurship major, minor, and certificate programs. Her teaching interests include Lean Startup, Innovation and entrepreneurship, Intrepreneurship, Acquisition entrepreneurship, and small and new venture accounting and finance. She is an advocate of real-world learning through 'stimulation, not simulation' and in her award-winning INE149 course, every student starts a side-hustle business. Her research interests include: gerontology and aging of business owners, mortality and family business, innovation in existing (and family) businesses ('intrepreneurship'), gendered investigations of business owner retirement ("ENDrepreneurship"), and entrepreneurial and small firm exit and acquisition strategies. She re-started the family business center at Husson University and developed workshops and other programming directed at family businesses and their advisors. Dr. Forster-Holt has presented her research nationally and internationally, including on the TEDx stage. Prior to academia, she had a 25-year career in public accounting and tax (Ernst and Young, NYC and Sacramento, CA), and as CFO of the second largest credit union in Maine. She was CFO of a tech startup and also co-owner of a family business, the manufacturing company Shaw & Tenney, which was a finalist for the Maine Family Business of the year.

Steven Gagner

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Lecturer, Grossman School of Business



Steve Gagner is an educator, entrepreneur, and strategist. Recently retired from the US Army after 28 years of service, Steve now teaches business at the University of Vermont's Grossman School of Business. Additionally, Steve is the co-founder of 14th Star Brewing Company in St Albans, Vermont. In this capacity, he was named the Small Business Administration's Legacy Business Awardee (2023) and Small Business Person of the Year (2019). The Military Times presented Steve their first-ever "Entrepreneur of the Year" award in 2018 and Vermont Business Magazine named him a Rising Star (40-under-40) in 2016. In addition to serving on the Vermont Chamber of Commerce's Board of Directors, Steve continues to serve his community through memberships in the Governor's Workforce Development Board and as an inaugural advisory board member of the Norwich University Center for Leadership. He also provides business consulting services to veteran entrepreneurs through the Small Business Administration's Veteran Business Outreach Center. Steve lives in St Albans, Vermont with his beautiful wife of 19 years, Nicole, and their two children: Madison and Marcus.

Edward Gamble

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Grossman School of Business



Ed is an Assistant Professor of Accounting at the Grossman School of Business. He joined the faculty in 2021. Prior to the University of Vermont, he was a tenured professor at Montana State University and a research fellow at the Initiative for Regulation and Applied Economic Analysis. Ed has taught financial accounting, managerial accounting, accounting research, and tax, at both graduate and undergraduate levels. In 2023, the students in the Grossman School of Business awarded him with the faculty member of the year award (thank you GSB students!). Ed's research examines how accounting and tax can facilitate entrepreneurial solutions to the UN-SDGs. This sustainability research focuses on performance measurement, internal controls, social and environmental audits, fraud, social impact measurement, and tax policy.

Matt Glass

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Eventage



Matt Glass '90 is Partner and Chief Creative Officer at Eventage, which he founded in 1998 with his wife Jennifer. Before Eventage, Matt served as Production Manager for the Macy's Thanksgiving Day Parade and other national events produced by the storied retailer. He has supervised the installation of everything from fireworks shells to rare orchids and managed every type of person, from Teamsters to tap dancers. Matt oversees production and creative services at Eventage. As a scriptwriter, his words have been spoken by the likes of Billie Jean King, Reese Witherspoon, Patrick Dempsey and First Lady Michelle Obama as well as Fortune 100 CEOs and everyday people battling challenges such as breast cancer, brain tumors and multiple sclerosis.

Judy Green

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Judy Green, Ph.D., is the president of the Family Firm Institute, an international organization engaged in educating, connecting, and inspiring advisors, consultants, educators, and researchers who serve family enterprises. FFI's mission is to be the most influential global network of thought leaders in the field of family enterprise.

Danna Greenberg

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Danna Greenberg is the Walter H. Carpenter Professor of Organizational Behavior at Babson College where she is also currently serving as Associate Dean of Faculty and Management Division Chair. Her research focuses on how individuals integrate work, family, and community as they move through their careers and how organizations can support individuals to have meaningful, impactful lives in and outside of work.

Lisa Groeneveld

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OnLogic



After a decade in Telecom sales in the US and Europe, Lisa Groeneveld returned to her native Vermont in 2003. She cofounded OnLogic which specializes in industrial computer hardware design and manufacturing. Lisa has guided the company to strategic growth of nearly 25% year over year through her strong international business, sales and technology background. Together with husband and co-founder Roland, she has expanded OnLogic's international efforts to develop in-house engineering and keen industrial design knowledge. Integrating the latest and most requested industrial IoT technologies, OnLogic ensures a seamless fit into complex client solutions. Today the company provides the computing power for some of the world's most well known businesses. As OnLogic's Chair of the Board, Lisa is deeply committed to meeting her clients' business, financial and technical goals.

John Gugliada

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John Gugliada Director of Strategic Partnerships & Business Development John Gugliada is an experienced Business Development Executive who partners with CEO's of both large and small businesses, to grow their top line. After many years of leading sales teams in a corporate setting, as an EVP and SVP, John truly understands what is required to drive results- and it's never accomplished through cutting corners in the short term. It's accomplished through a well thought out strategy and keeping your daily playbook simple. He has worked with companies in multiple industry segments, spanning five continents. John holds an MBA from the University of Hartford and is a regular contributor to State economic and workforce development committees.

Torri Hawley

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Tamarind Learning



Torri is the Director of Client Learning Experience at Tamarind Learning. A seventh-gen member of a 150-year-old family business, she sits on her family office and operating companies' boards. With a BBA in Family Enterprise Management and a master's in Strategic HR, she brings a decade of experience in wealth education. Certified in family business and wealth advising, she previously worked in Ultra-High-Net-Worth Wealth Management and a multi-gen family office. A recognized speaker, she was named one of Family Business Magazine's "25 Under 35." Torri focuses on local childhood hunger initiatives and lives in Philadelphia with her husband and dog.

Matthew Hoffman

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Hoffman Auto Group



Matthew S. Hoffman is President of Hoffman Auto East of the Hoffman Auto Group, which was founded in 1921. Matthew Hoffman graduated in 1999 from the University of Vermont and holds a degree in Small Business Management with a minor in Marketing & Economics. As an Automotive News 2015 "40 Under 40 Retail" honoree, Mr. Hoffman has always made it a priority to be involved in the community. Mr. Hoffman and his family are also involved with many other local charitable organizations and fundraising events in the arts, education, and medical associations within the Greater Hartford area. Matthew Hoffman resides in West Hartford, Connecticut with his wife, Monica Hoffman, and their two daughters, Emma and Serena, with whom he enjoys spending most of his time.

Adam Ifshin

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DLC



Adam Ifshin is Founder and CEO of DLC Management Corp., which he founded in 1991. Since then, he has grown DLC into one of the nation's premier owners and operators of retail real estate, and one of the most active acquirers of assets with value added potential. Mr. Ifshin oversees DLC's acquisitions and dispositions, capital markets activities, redevelopments, joint ventures, and corporate strategy. As a principal, he has been involved in over \$4.5 billion of real estate transactions. Mr. Ifshin received a BA, cum laude, from Williams College, with honors degrees in economics and history, and was elected to Phi Beta Kappa. Mr. Ifshin is a member of the Board of Trustees of the International Council of Shopping Centers (ICSC), a member of the Executive Board of the Board of Trustees of ICSC, and a full member of the Urban Land Institute (ULI).

Debbie Ingram

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Executive Director of Vermont Interfaith Action



Rev. Debbie Ingram has served as a non-profit executive, businessperson, and elected official. For 16 years, she has been the Executive Director of Vermont Interfaith Action, a social justice non-profit. Before moving to Vermont, Debbie worked in the film and TV industry in Los Angeles, then ran a Communications firm in Bangladesh, where for seven years she produced publications and informational videos for NGOs and businesses. Currently Debbie makes videos and performs voiceovers in the Vermont communication industry. Debbie served on the Williston Selectboard and as a Senator in the state legislature. She received her BA "with distinction" from Stanford University and her Master of Divinity from Fuller Theological Seminary, and she completed a fellowship at Cambridge University, England.

Albert James

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Dalhousie University



Albert James, an Associate Professor in the Faculty of Management at Dalhousie University. A late bloomer who after 25 years working for family businesses became an academic in his 50th year. Research and teaching interests are focused on family business topics, entrepreneurship, Indigenous entrepreneurship, decolonization in our curriculum, and stewardship theory.

Luis Arturo Jimenez-Castillo

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Luis Jimenez Castillo is a Professional Lecturer at the Driehaus College of Business, Management and Entrepreneurship of DePaul University. He earned his Ph.D. in Business Administration at the Business School from the Worcester Polytechnic Institute (WPI) in Worcester, MA. His research interests are internationalization, strategy, corporate entrepreneurship, family firms, and sustainability. In addition, Luis has experience teaching management, strategy, entrepreneurship, and innovation courses. As a family business practitioner, Luis served as the Chairman of the Board of his family's firm in Mexico. He has also consulted for other family-managed companies in the Jalisco area.

Arran Joyce

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University of Vermont



While a student at the University of Vermont, Arran was a Lead Student Coordinator during the 2014 and 2015 Family Enterprise Case Competitions. After graduating in 2015, Arran spent 4 years at General Electric in their Power and Oil & Gas businesses, holding a variety of positions in the Finance and M&A departments. Arran is currently a Manager in the Private Equity Services practice at Alvarez & Marsal, specializing in operational due diligence and performance improvement for private equity clients.

Jim Keller

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Green Mountain Business Consultants LLC



Jim Keller is the President of Green Mountain Business Consultants, a consulting business solving a diversity of issues for international enterprises. He is also the retired President of Rengo Packaging Inc., a packaging manufacturer located in Honolulu, Hawaii. Mr. Keller received a Bachelor of Science from the University of Vermont and was previously the Interim President of the UVM Foundation. He received his Master of Business Administration from Dartmouth College. Mr. Keller is currently the Chairman Emeritus of the University of Vermont Foundation and the Chair of the Indigenous Education Foundation of Tanzania, which provides for co-education opportunities in rural Tanzania Communities.

Michael Keller

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Retired Partner from Gallagher, Flynn and Company,LLP



Mike is a retired managing partner of Gallagher, Flynn and Company, LLP, a regional CPA firm headquartered in South Burlington VT. In addition to firm management, Mike was responsible for providing accounting, tax, and general advisory services to closely held or investor-owned businesses in a variety of industries. Mike was a former chair of the Vermont Board of Accountancy as well as New England Peer Review, Inc. Mike currently does advisory board work for family-owned businesses.

Bram Kleppner

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Danforth Pewter



Bram Kleppner is the non-family member CEO of Danforth Pewter, a 50-year-old family business with roots in the 1750s. He led the company out of the Great Recession and back to profitability, and shepherded Danforth through the pandemic. Bram has led three successful acquisitions and instituted company-wide profit-sharing and partially paid maternity leave. He converted the company to 100% solar electricity, and put the company on the path to zero fossil fuel use. Bram serves on the Vermont Climate Council, overseeing the implementation of Vermont's plan to reduce carbon emissions. In 2018, Bram was honored with the Terry Ehrich Award for Lifetime Achievement in Socially Responsible Business. He is a proud graduate of the Grossman School's MBA program.

Astrid Kramer

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Tilburg University



Dr. Astrid Kramer is senior lecturer at the Department of Strategy and Entrepreneurship from Tilburg School of Economics and Management, Tilburg University. In her work, Astrid combines teaching, management of education, and research. She teaches courses on strategy and entrepreneurship and is associate dean program portfolio and innovation at Tilburg School of Economics and Management. In addition, she conducts research on various facets of family businesses, such as (family) governance, HRM, and the role of the family in family businesses. She is she is affiliated to the Tilburg Institute of Family Business where she is responsible for the executive program of supervisory boards in family firms.

Evan Langfeldt

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O'Brien Brothers



As President & CEO of O'Brien Brothers, Evan oversees all aspects of the 65-year-old real estate development and management firm, including operations, strategy, finance, and real estate development planning and execution. Evan joined O'Brien Brothers in late 2015. His previous eight years had been spent at ReArch Company, a Vermont-based real estate development, construction and property management firm, where he served as Vice President of Development. Prior to ReArch, Evan spent several years as Director of Operations of Meridian Development Group, where he contributed to the development of the base villages at Mammoth Mountain and Northstar ski resort in the Lake Tahoe area. Evan was born and raised in Middlebury, Vermont, and graduated from Hamilton College in Clinton, New York.

Karen Lawson

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Lawson's Finest Liquids



Karen is a graduate of the University of Vermont, with a Master's degree in Public Administration. Her undergraduate degree in Sociology and Psychology was obtained at Franklin Pierce University in NH. After graduation, Karen had a 20-year career in Vermont state government with Department of Corrections as their Housing Coordinator. Karen is co-owner of Lawson's Finest Liquids, a B Corp certified brewery in Waitsfield, VT. She oversees the company's values-based Social Impact Program, which works to support thriving communities and is focused on cultivating a people-first work place and greening the planet. In her spare time, Karen enjoys doing Pilates, reading, relishing the Vermont summer and enjoying adventures with her husband, two daughters and rescue dog.

Steve Legler

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TSI Heritage



Steve Legler grew up as the heir apparent to his father in the family business that "Steve Sr." had started before "Steve Jr." was born. After dutifully completing his MBA to prepare himself to eventually take over their steel fabricating business, a liquidity event changed those plans pretty quickly. So instead, Steve spent a couple of decades running their "Family Office" even though that term was still not well known. Steve eventually got wind of the "Family Enterprise Advisor Program" in Canada, and somehow ended up there, just in time to have his "calling" in his late 40's. He has since re-oriented his work towards helping family businesses, while concentrating on the family circle. Steve immersed himself in coaching, mediation and facilitation training, and continues to study Bowen Family Systems Theory. He is the author of SHIFT your Family Business (2014) and the Interdependent Wealth (2019).

Paul Ligon

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Casella



Paul Ligon is the Senior Vice President and Chief Revenue Officer for Casella (CWST), a premier provider of sustainable recycling, recovery, and disposal services. Prior to joining Casella, Paul served on the leadership teams of Waste Management (WM) Organic Growth venturing unit, scaling profitable sustainable material management service units. Before joining WM, he was a Senior Scientist with the Tellus Institute for Resource and Environmental Strategies - a global environmental research and consulting NGO - advising agencies and businesses on emerging best practice and policies related to sustainable product and material recovery, recycling, and reuse. Paul received a Bachelor of Science in Natural Resources from the University of Vermont, and an MBA from the Tuck School of Business at Dartmouth College. He co-founded the University of Vermont's "Vermont Student Environmental Program", and Tuck's "Business and Sustainability Initiative".

Olivia Machanic

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Unilever

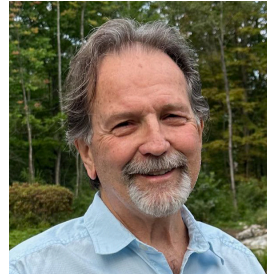


Olivia Machanic is a fourth-generation Catamount and alumna of the UVM Grossman School of Business. While at UVM, she was the Finance Chair of the Student Government Association, the Manager of the Women's Varsity Lacrosse Team, and the President of the Inter-Residence Association. She competed in multiple case competitions, was a member of the organizing committee for SG-FECC, and co-founded the Grossman Deans Cup — UVM's first in-house case competition. She graduated from UVM in 2020 and joined Unilever's Supply Chain Future Leaders Program. She completed four rotations in waste mitigation, factory management, retail sales, and demand planning. Now, she is transitioning into a new role as an Associate Innovation Planning Manager.

Will MacKinnon

willmackinnonvt@gmail.com

Retired Part-time Consultant "MacKinnon Business and Banking Consulting"



Recently retired after 45 years in Commercial Banking. Currently providing consulting services. Recently retired after 28 years in management with TD Bank N.A. (Toronto Dominion Bank). Served as a Regional Vice President in charge of Commercial Loan, Deposit and Treasury Management Services production. Managed a team that was responsible for well over a billion dollars in Commercial Loan Commitments & Deposits. Prior to joining TD Bank, managed all Commercial Operations for a very successful Community Bank in VT. Other: Founded & operated the Vermont Hockey School with two partners for 30+ years; Played & Coached Professional Hockey in Italy & Sweden (two years) and, with my wife Colleen, founded, operated & sold a specialty bake shop here in VT.

Felipe Massa

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Grossman School of Business



Felipe G. Massa became an Associate Professor at the University of Vermont's Grossman School of Business in 2023. He teaches experiential entrepreneurship and consulting classes and conducts research on decentralized, non-hierarchical organizations (e.g., hacker collectives, cultural industries, decentralized finance movements) that break with conventional ways of structuring innovation and supporting social change. He comes to UVM after receiving his M.S. and Ph.D. in Organization Studies from Boston College and serving as a faculty member at the Loyola New Orleans College of Business (2012-2023) where he founded the Center for Entrepreneurship and Community Development, led undergraduate and graduate programs in Entrepreneurship (ranked 14th by U.S. News and World Report, 2022), and published a bestselling guidebook called "Entrepreneurship in the Wild: A Startup Field Guide" (MIT Press, 2021). For his efforts, he has been named one of the Top 50 undergraduate business professors by Poets and Quants (2021) and one of the most influential people in technology in Louisiana (Silicon Bayou News, 2013-2019).

Will Nedds

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KPMG



William Nedds is an advisory manager and automation development lead within KPMG's Federal advisory practice. After completing his undergraduate studies at the Grossman School of Business in 2016, William began advisory and consulting work within the government space. Now, six years later and after completing his MBA, William oversees the standup of business process optimization and robotic process automation programs within the U.S. Federal Government. Currently residing in Washington, DC, William is thrilled to return to judge GSB FECC.

Viviane Neiter

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Neiter Consulting



Viviane is a slasher in corporate governance. After running a family jewellery store between 1980 and 2003, she has been a family and business advisor at Neiter Consulting in the East of France. She animates the consultative shareholders committee at Wendel, a family business firm. Moreover, she serves as a board member in four French-listed companies and as a Chair of the French subsidiary of an Irish company Glanbia Performance Nutrition. Viviane teaches corporate governance & CSR in a couple of business schools. She regularly attends FERC and she is a member of the Governance Professionals of Canada. She is excited to serve once more as a judge. All the more, she was co-coach of the ICN team for the 6th annual SG-FECC. She graduated from NEOMA BS in Reims, France.

Maria Jose Parada

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ESADE Business School



Maria José Parada is Director of the Strategy and General Management Department and an Associate Professor of Family Business & Strategy at ESADE Business School. Co-Director of the ESADE Global Business Family Initiative. She holds a PhD from JIBS, a PhD, and an MBA from ESADE. She is CeFEO Affiliated Researcher at JIBS, and former Visiting Researcher of the INSEAD Global Leadership Center at HEC. She is FFI Fellow and has an advanced FB advising certificate from Family Firm Institute. Her work has been published in academic journals, book chapters, and has co-edited three books. Prior to academia she worked for a corporation in the telecom industry and in her family business in the tourism industry. She served as board member in the EU STEP council and in her family-owned business.

Patricia Prelock

patricia.prelock@uvm.edu
University of Vermont



Patricia Prelock, Ph.D., is Provost and Senior Vice-President at University of Vermont. Formerly, she was the Dean of the College of Nursing and Health Sciences at the University of Vermont for 10 years. She is also a Professor of Communication Sciences & Disorders and Professor of Pediatrics in the College of Medicine at the University of Vermont. Dr. Prelock received her Ph.D. in speech-language pathology from the University of Pittsburgh. She is a recognized expert in the nature and treatment of autism and has been awarded more than 24 million dollars in funding as a PI or Co-PI and has over 211 publications and 585 peer-reviewed and invited presentations/keynotes.

Wendy Sage-Hayward

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Family Enterprise Canada



Wendy, an educator, author, consultant, and family business owner, with 30+ years of experience guiding business leaders, family firms, and their boards. She serves as Academic Director at Family Enterprise Canada and a senior consultant at the Family Business Consulting Group. Wendy's tenure includes 20+ years as a fifth-generation director in a 135-year-old U.S. family firm. Presently, she operates an agricultural tourism business in the Southern Gulf Islands with her family. Wendy shares her expertise in two co-authored books, "Human Resources in Family Business: Maximizing the Power of Your People" and "Own It! How to Develop a Family Enterprise Owner's Mindset at Every Age". Her passion lies in supporting business families in transitioning their enterprises to future generations.

Petru Sandu

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Elizabethtown College



Petru is the founding director of the Family Business and Entrepreneurship Program and the academic coordinator for the High Center for Family Business at Elizabethtown College. As a tenured associate professor of Entrepreneurship and Management at the School of Business, he has been teaching classes of Family Business, Corporate Strategy, and Entrepreneurship. Petru received his Ph.D. in Entrepreneurship from Al. I. Cuza University, Romania, and his MBA from The Ohio State University. He founded a family business in his old country that has been around for the past 30 years. He has been a visiting professor in several countries, teaching in other two languages, besides English. In the Spring semester of 2023, Petru will be a Fulbright Senior Scholar at the University of Murcia, Spain.

Ava Schlesinger

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Terra Sky Center for Wellness



Ava Schlesinger is a Licensed Clinical Social Worker and Supervisor in NY and NJ; an adjunct professor at NYU's Silver School of Social Work; an interfaith minister; a non-profit management consultant; and most recently, a para-medical tattoo artist. She began her professional career as an Art Director in the world of marketing, branding and communications before becoming a social worker.

Ava received her BFA from Parsons School of Design and both her MSW and MPA from New York University. She was ordained as an interfaith/interspiritual minister by One Spirit in 2012. Ava's expertise over the last 30 years has been focused on holistically addressing the short- and long-term symptomatology and human and community costs associated with different aspects of individual and systemic trauma and violence. This work has informed her depth of commitment to social movement and change and was the inspiration for her to begin developing programs and curricula to support non-profit organizations with their management and training. She has had the privilege to work locally and nationally, traveling to Thailand, Cambodia, Liberia and India on working missions in her pursuit of discovering how to best be of service.

Steve Schlesinger

steve.schlesinger@sago.com

Sago



Steve has been in the marketing research industry for over 35 years, starting his career as a project manager and then working his way up to lead Schlesinger Group as CEO for 25 years where he created the strategy and vision for the business as the world's leading data solutions and research technology company. In November 2022, he became Executive Chairman and continues to help drive the company's growth and digital transformation under its new brand, Sago.

He served for 8 years on the board of the then Marketing Research Association, finishing his tenure as the Secretary of the Board. He is a founding member of the Insights Association CEO Summit and continues his involvement, co-chairing the events. Steve is also a founding member of Marketing Research Education Foundation. Steve is an active member of Insights Association, AMA, ESOMAR, EphMRA & PMRG. He was presented the MRA (Insights Association) Honorary Lifetime Member award in 2015, in recognition of a commitment of outstanding individual service to the Association and the marketing research profession.

Steve serves on the board of directors of SampleCon, Inspire.com, the advisory board HR Acuity, the advisory board of Brrrn, the advisory board of The University of Vermont Foundation, and the Advisory Board of Michigan State University Master of Science in Marketing Research Program. He previously served on the board of directors of The Overlook Foundation, Maplewood Country Club, Beth Hatikvah Synagogue, Bibo Barmaid, and Free All Media.

Steve is a graduate of the University of Vermont with a Bachelor of Science in Biochemistry. His numerous passions include innovation and technology as well as tennis, golf, and travel. He is married with two grown-up children and a grandson.

Hank Slauson

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Flexaseal Engineered Seals and Systems, LLC



Hank Slauson is Chairman & Founder of Flexaseal Engineered Seals & Systems LLC. Flexaseal is a leading global manufacturer of close-tolerance and custom-engineered mechanical seals and systems with over 80,000 SKUs. Having manufacturing and repair facilities in VT (100% solar powered), LA, and three in TX, NY, WA, Flexaseal prides itself on supplying sealing solutions in the time required and at a fair price point. Further, in 1996, Hank and his Brazilian business partner started a sister manufacturing company with four branches in Sao Paulo Brazil. There are 60+ employees at these locations. Flexaseal has grown from an original one-person operation to 250+ employees worldwide doing business in 50+ countries. It remains a family-owned business with an additional merged partner added in 2020.

Olaf Ten Hoopen

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Moore MKW



I have worked as a tax advisor for owner managed businesses for thirty years and helped to manage several business successions. I served as the CEO of our company for 10 years, before merging it with another company. In January, I joined the board of Moore MKW, an organization of accountants and advisors with 1000 employees. For 9 years I have taught tax law at a business university. I am 56 years old, married to Nynke, two children Marijke and Wouter.

Jim Tessmer

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Brown Brothers Harriman



Jim Tessmer is the Head of Digital Product Strategy for BBH's Investor Services business, responsible for leading the digital product lifecycle of discovering, incubating, and delivering BBH's newest and most differentiated digital solutions. Jim's career includes operational, technical, product, and consulting roles. Prior to joining BBH, Jim held a variety of roles including Department Head for Global Product and Platform Solutions at State Street, Senior Manager at Deloitte Consulting, and Director of Digital Consulting at Genpact. While most of his career has been in financial services, Jim also has experience in Healthcare and Public Sector industries. Jim holds a BS in Business from Skidmore College and an MS in Information Systems from Boston University.

Júlia Tobak

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University of Pannonia



Dr. Júlia Tobak is a research fellow from Hungary with a professional background spanning academia and the profit sector. Her expertise in entrepreneurship, business management, and practical food industry experience aligns with her active role in projects, events, and startup judging promoting innovation and entrepreneurship. She has a strong commitment in the investigation of family businesses because she comes from a family business founded by her father. This is the driving force behind her openness and curiosity to understand the specialties of family-owned companies. In her previous research, she focused on the success factors and succession in family businesses. Beyond her professional pursuits, she's an amateur triathlete and a Spinning instructor.

Joyce Van Leeuwen

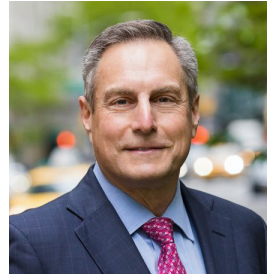
joycevan_leeuwen@hotmail.com
Van Leeuwen Group



Drs. Joyce van Leeuwen is a labor and organizational sociologist and has been working with joy and passion at the family business Van Leeuwen Group for many years. Since 2011 she has been the strategy manager and is ultimately responsible for the Van Leeuwen Group. In addition, Joyce is doing an external PhD on work satisfaction and life satisfaction at Erasmus University Rotterdam. Joyce's mission is to encourage conscious living.

Jeffery Wacksman

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Loeb, Block & Partners LLP



Jeff a 1982 graduate of UVM is a senior partner at the law firm of Loeb, Block & Partners LLP. He started his legal career at Shearman & Sterling after graduating from Cornell Law School in 1985. Jeff advises ultra-high-net-worth individuals, family offices, and fiduciaries in all aspects of their legal, business, and financial activities. He assists clients in business and investment structuring, corporate mergers, financings and asset acquisitions and divestitures, including real estate. He advises those same clients in their domestic and international trust and estate planning, family succession planning, and philanthropic giving. Jeff has served on numerous Boards, including open and closed-end public mutual funds, private foundations, public charities, and closely held corporations.

Thomas Wheeler

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A.W. Brown Pet and Garden Store



Tom Wheeler owned and operated a successful family retail pet and garden business in Western Massachusetts. Under his family's leadership since 1985, Tom's company became an award-winning local retailer serving the greater Springfield, MA area with pet, garden, and seasonal products, a dedicated staff, superior customer service, and engagement with the local community. To sustain his family enterprise and their legacy, in 2022 Tom partnered with Teamshares Inc., a private equity fintech firm, to transition the company to become an 80% employed-owned organization over the next 20 years. In addition to assisting his former company with the ownership transfer, Tom continues to be engaged with other small businesses and charitable organizations. In 2013, his company and family were recognized by the Grossman School of Business as the 1st Generation Family Enterprise Award winner. Tom has served as a GSB FECC Judge and actively supports other GSB Legacy and Family Enterprise programs. He is an alum of UVM '77 BS, with post-graduate degrees from Penn State MS, and UConn MBA.

Robyn Worrall

robypw@gmail.com

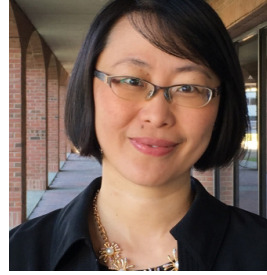
RJW Pharma



Robyn graduated from UVM in 2014 from the Business School, and also participated in FECC her senior year. After graduation, she moved to NYC and worked in sales before deciding to join her family business, which is focused in the pharmaceutical industry. After working there for a few years, she moved into Business Development at a generic pharmaceutical company called Lannett managing mergers and acquisitions for the firm. Using the knowledge gained at Lannett, Robyn recently started a sister company under her family business focused on growing and diversifying the core business model her mom built over 30 years ago.

Chun Zhang

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University of Vermont



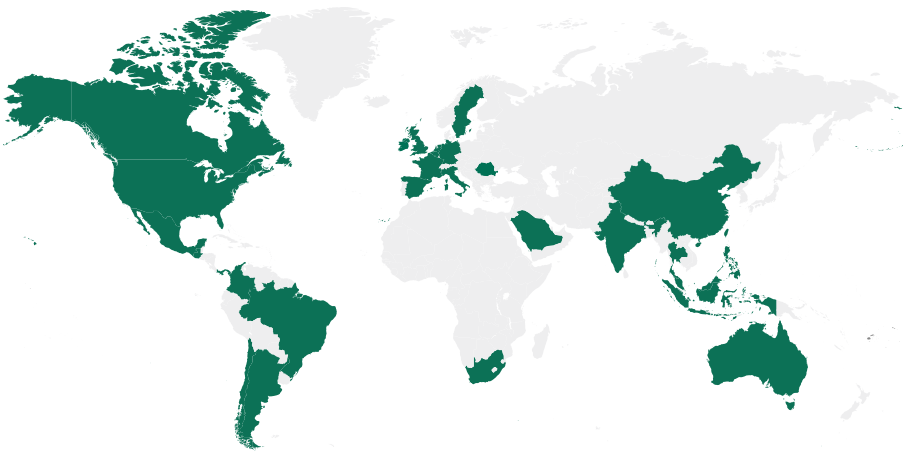
Dr. Zhang received her Ph.D. in Marketing and her M.S. degree in Agricultural Economics from Michigan State University. She also received her B.A. in Finance from Renmin University of China. Her research interests include relationship management challenges between organizations. In particular, she examines how to govern and recover inter-organizational relationships in complex environments. In recent years, Dr. Zhang has been working on disruption management in B2B relationships. Her scholarly work has appeared in journals including the Journal of International Business Studies, Journal of Operations Management, MIT Sloan Management Review, Industrial Marketing Management, Marketing Letters, International Business Review, and Journal of International Marketing. Dr. Zhang has taught marketing management, international market analysis, and marketing research since 2005. Her industry experience includes statistical analysis for the Risk Management Group at Kraft Foods Inc. and project intern work for the Euro-Asia Flower Trade Corporation, Beijing.



SCHLESINGER GLOBAL FAMILY ENTERPRISE CASE COMPETITION | COMPETITION JUDGES

2024 RECAP

There was considerable interest in judging this year's SG-FECC, with 197 judge applicants and only 115 judging spots – and there's already a wait list for judging for the 2025 event. Altogether 61 judges serving on 23 judging panels, shared their time and expertise during this competition. "SG-FECC wouldn't be the same event without our esteemed judges like Steve Schlesinger, Jim Keller, UVM Provost Patty Prelock, Rino Caruccio, Wendy Sage Hayward, Mira Bloemen-Bekx, and Adam Ifshin," added Sharma. Over 600 judges has served on SG-FECC panels since the inception of this competition in 2013.





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Case Selection Committee

Mira Bloemen-Bekx (chair)

Hanze University of Applied Sciences, The Netherlands

Albert James

Dalhousie University, Canada

Karen Vinton

Emeritus Montana State University, USA

Leilanie Mohd Nor

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