



## Upstate Executives Peer Group (Hudson Valley)

### Overview

The Executives Peer Group supports executives of established and high-growth potential companies and organizations to address both day-to-day and strategic challenges. The professionally facilitated group serves as a strategic advisory resource to provide and receive insights, knowledge, and experience that assist fellow members in identifying and resolving key business questions.

The goal is to bring together a diverse group of high-performing leaders of organizations in the Hudson Valley to build a trusted group of advisors who will act as invaluable resources for one another. The initial guidelines for members are CEOs or other C-level leaders of companies with at least \$1MM in revenue. Non-profit executives will also be considered.

What's most important is the mindset of the leader - s/he should be:

- Focused on strategy and evolution for the organization s/he runs
- Willing and able to maintain confidentiality
- Willing and able to share confidential information
- Open to feedback from fellow members
- Willing to provide feedback to other members and engage with content before and during meetings

### Logistics

The group will be led by an experienced facilitator and will have a minimum of 8 and maximum of 15 members. It will meet at least every other month at a member's location for up to ¾ of a day (start 8:30 AM, end 3:00 PM). The format of each day will include pre-meeting preparation (sharing of KPIs a week in advance, reviewing same for all members a few days in advance), and detailed discussions in a closed-room environment about specific challenges or questions that individual members face. Action items will be agreed on by the end of the meeting. The facilitator will hold individual check-ins by phone between meetings. Occasionally, outside speakers will be invited at the request of the group or recommendation of the facilitator. The peer group is priced at \$3,600 per year. The fee includes membership in Upstate Capital. A one year commitment is required. The group launched with its first meeting on June 26, 2018.

### About the Facilitator

Steven Wasser (MBA, Harvard Business School) has 20 years of experience participating in CEO groups and 30 years as the CEO of Verne Q. Powell Flutes – the Stradivarius of flutes, a company which he sold in 2016. He is an active member in the Hudson Valley Startup Fund, a member-managed seed capital fund located in the Mid-Hudson region, and had prior



angel investment experience in Boston. Steven has taught entrepreneurship, strategy, and leadership at both the undergraduate and graduate levels.

### **Hudson Valley Group Members**

Tim Dean, Marshall & Sterling, Poughkeepsie, ESOP insurance company

Kevin Pitcock, Peak Trading, Saugerties, rigging supplies

William Schaefer, Rhinebeck Kitchen and Bath, Rhinebeck, retail and service business

Katy Dwyer, Dwyer Design, Kingston, graphic design and marketing

Jacob Reckess, Paz Management, Poughkeepsie, real estate and healthcare businesses

Kathryn Whitman, Quatrefoil, Hyde Park, high end residential design and build

Brett Fliegler, Brookbeam Dental, Kingston, dental group practices

Dan Stone, Moonfarmer, Kingston, software and website development company

Eileen Banyra, Founder and CEO, Accord, Community Compost Company

Noa Simons, New Paltz, non-profit facilitating access to capital

### **About the Organization**

The Upstate Capital Association of New York is a non-profit formed in 2003 to support high growth potential startups and established companies across Upstate New York. The organization connects the business and investment community to help start, grow and sustain strong companies in Upstate New York - read more at [www.upstatecapital.org](http://www.upstatecapital.org).

For more information, please contact:

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