## The University of Toledo Family Business Center

### 2020 EOS Vision/Traction Organizer

<table>
<thead>
<tr>
<th>Core Values</th>
<th>3-Year Picture</th>
</tr>
</thead>
</table>
| 1) Member-driven | **Future Date:** June 2023  
2) Open Learning Environment | **Membership Size:** 285 member companies (35% Friends)  
3) Healthy Family Relationships | **Endowment Size:** $3.5 million –$ 5 million  
4) Collaborative Community Partnerships | **Staff Size:**  
5) Mutually beneficial relationship with UToldeo | Director, FT  
Core Focus | Assistant Director, FT  
Special/Wide Scale | Event and Marketing Manager, FT  
10-Year Target | Administrative Assistant, PT  
Marketing Strategy | Graduate Assistant, PT  
What Does It Look Like? | EIR, PT or Faculty Position, FT  
Target Market: Owners, family members and non-family executives of family and privately-held businesses in Northwest Ohio and Southeast Michigan |  
Three Uniques: Member driven, peer mentoring, academic partnerships  
Marketing Tactics: Strategic partnerships with other FBC’s; bold social media plan; creating and distilling FB content; experts in peer group learning (affinity groups) |  
Purpose/Cause/Passion: Help family businesses thrive and grow for the betterment of our community. |  
Our Niche: Holistic support, including relationship-building, advice and education, for family businesses through UToldeo and community partnerships and relationships.  
| Remain financially independent of UToldeo  
| Be known as a nationally respected family business center, presenting or publishing twice a year  
| Support over 500 member companies through outreach and education programs  
| Industry leader in peer learning, facilitating over 40 affinity groups/trademarked program  
| Provide original FB education, offering more than a dozen revenue-generating seminars, workshops, courses, etc.  
| Contribute to the success of regional family businesses, thus having a positive regional economic impact on the local economy |  
## 18 MONTH PLAN

**Future Date:** June 2021  
**Membership Size:** 225 (25% Friends)  
**Endowment Size:** $3 million  
**Staff Size:** Director, FT; Assistant Director, FT; Event and Marketing Manager, PT; Administrative Assistant, PT; Graduate Assistant, PT

**Goals for the Year:**

- Grow membership by 10% (total: 235, Net new: 23; gross new: 34)
- Maintain 94% retention rate
- Maintain 88% participation rate
- Grow endowment to $3 million (current: $2.3M)
- Present at a national conference
- Publish one journal/trade article
- Offer three niche certificate programs
- Conduct a revenue benchmark study
- Increase national brand awareness

<table>
<thead>
<tr>
<th>Future Date: June 2021</th>
<th>Membership Size: 225 (25% Friends)</th>
<th>Endowment Size: $3 million</th>
<th>Staff Size: Director, FT; Assistant Director, FT; Event and Marketing Manager, PT; Administrative Assistant, PT; Graduate Assistant, PT</th>
</tr>
</thead>
</table>

## QUARTERLY PLANS/ROCKS

<table>
<thead>
<tr>
<th>Quarterly Plans through Dec. 2020</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection for HTML code to integrate brand into MemberClicks</td>
<td>Emily</td>
</tr>
<tr>
<td>Revise campaign case</td>
<td>Angie</td>
</tr>
<tr>
<td>Relaunch campaign aligned with UT Toledo capital campaign</td>
<td>Maria/Angie</td>
</tr>
<tr>
<td>Judge national student case competition</td>
<td>Angie</td>
</tr>
<tr>
<td>Work with Jenell to continue Workaholism research and FERC presentation in May</td>
<td>Angie</td>
</tr>
<tr>
<td>Work with Jenell on new research in learning through peer groups</td>
<td>Kurtyn</td>
</tr>
<tr>
<td>Revise Center Bylaws</td>
<td>Exec</td>
</tr>
<tr>
<td>Identify and monitor online tracking/analytic metrics</td>
<td>Emily</td>
</tr>
<tr>
<td>Review lead management process</td>
<td>Kurtyn</td>
</tr>
<tr>
<td>Work with partners to develop marketing certificate program and identify others</td>
<td>Angie</td>
</tr>
<tr>
<td>Five year financial projections</td>
<td>Angie</td>
</tr>
<tr>
<td>Document and streamline membership and event processes</td>
<td>Emily/Kurstyn</td>
</tr>
</tbody>
</table>

## ISSUES LIST

- Naming of the Center
- Sponsorship structure
- Membership structure and dues
- Endowment size
- UT Toledo bureaucracy
- Keeping a hold on our niche (peer group competition)
- Content development
- Commitment and attendance