

The University of Toledo Family Business Center

2020 EOS Vision/Traction Organizer

<p>CORE VALUES</p>	<ol style="list-style-type: none"> 1) Member-driven 2) Open Learning Environment 3) Healthy Family Relationships 4) Collaborative Community Partnerships 5) Mutually beneficial relationship with UToledo 	<p style="text-align: center;">3-YEAR PICTURE</p> <p>Future Date: June 2023 Membership Size: 285 member companies (35% Friends) Endowment Size: \$3.5 million –\$ 5 million Staff Size: Director, FT Assistant Director, FT Event and Marketing Manager, FT Administrative Assistant, PT Graduate Assistant, PT EIR, PT or Faculty Position, PT</p> <p>What does it look like?</p> <ul style="list-style-type: none"> • Endowed faculty position (split-funded with COBI) • Aggressive capital campaign • Multiple FB research projects • Multiple, relevant certificate courses/programs • Co-branding University relationships • 30 affinity groups • Cost-share or endowed GA position • National reputation • Thought leader in the industry • Content experts in peer groups/relationships • FBC published articles • Wide variety of programming and events
<p>CORE FOCUS</p>	<p>Purpose/Cause/Passion: Help family businesses thrive and grow for the betterment of our community.</p> <p>Our Niche: Holistic support, including relationship-building, advice and education, for family businesses through UToledo and community partnerships and relationships.</p>	
<p>10-YEAR TARGET</p>	<ul style="list-style-type: none"> • Remain financially self-sustaining • Be known as a nationally respected family business center • Support over 500 member companies through outreach and education programs • Industry leader in peer learning, facilitating over 40 affinity groups/trademarked program • Provide original family business education/content, 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 	
<p>MARKETING STRATEGY</p>	<p>Target Market: Owners, family members and non-family executives of family and privately-held businesses in Northwest Ohio and Southeast Michigan</p> <p>Three Uniques: Member driven, peer learning, academic partnerships</p> <p>Marketing Tactics: Strategic partnerships with other FBC's; bold social media plan; creating and distilling family business content; experts in peer group learning (affinity groups)</p>	

The University of Toledo Family Business Center

12 MONTH PLAN	QUARTERLY PLANS/ROCKS	ISSUES LIST																																																	
<p>Future Date: July 1, 2022 Membership Size: 265 (25% Friends) Endowment Size: \$3.5 million (including pledges) Staff Size: Director, FT; Assist Director, FT, Event and Marketing Manager, FT; Admin Assistant, PT, Student Worker PT</p> <p>Goals for the Year:</p> <table border="1" data-bbox="75 704 699 1386"> <tr><td>Total membership: 265</td></tr> <tr><td>Friends of the Center: 66</td></tr> <tr><td>New leadership group: food industry cohort</td></tr> <tr><td>Participation rate: 88%</td></tr> <tr><td>Campaign gifts: \$250,000</td></tr> <tr><td>Publish two journal/trade articles</td></tr> <tr><td>Offer three niche certificate programs</td></tr> <tr><td>Non-member PSP registrants: 10</td></tr> <tr><td>Receive at least one grant</td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>	Total membership: 265	Friends of the Center: 66	New leadership group: food industry cohort	Participation rate: 88%	Campaign gifts: \$250,000	Publish two journal/trade articles	Offer three niche certificate programs	Non-member PSP registrants: 10	Receive at least one grant			<p>Quarterly Plans through March 2022 Who</p> <table border="1" data-bbox="737 518 1360 1386"> <tr><td>Social media metrics process/format</td><td>Megan</td></tr> <tr><td>Secure \$50,000 campaign gifts/pledges</td><td>Angie</td></tr> <tr><td>Launch PSP registry by Jan 15</td><td>Kurstyn</td></tr> <tr><td>Add five more Friends of the Center (convert or new)/10 new members</td><td>Kurstyn</td></tr> <tr><td>Launch two leadership groups</td><td>Kurstyn</td></tr> <tr><td>Solidify KeyBank speaker and plan</td><td>Megan</td></tr> <tr><td>Rebrand the FBSA</td><td>Angie</td></tr> <tr><td>Reach capacity for certificate programs</td><td>Angie</td></tr> <tr><td>Review peer equity data and formulate plan</td><td>Kurstyn</td></tr> <tr><td>Identify grant opportunities</td><td>Angie</td></tr> <tr><td>Proposal for new membership category</td><td>Angie</td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </table>	Social media metrics process/format	Megan	Secure \$50,000 campaign gifts/pledges	Angie	Launch PSP registry by Jan 15	Kurstyn	Add five more Friends of the Center (convert or new)/10 new members	Kurstyn	Launch two leadership groups	Kurstyn	Solidify KeyBank speaker and plan	Megan	Rebrand the FBSA	Angie	Reach capacity for certificate programs	Angie	Review peer equity data and formulate plan	Kurstyn	Identify grant opportunities	Angie	Proposal for new membership category	Angie					<table border="1" data-bbox="1398 453 2024 1276"> <tr><td>Post-pandemic economy</td></tr> <tr><td>Limited sponsorship structure</td></tr> <tr><td>Membership structure and dues</td></tr> <tr><td>Endowment size</td></tr> <tr><td>UToledo bureaucracy</td></tr> <tr><td>Keeping a hold on our niche (peer group competition)</td></tr> <tr><td>Content development</td></tr> <tr><td>In-person attendance/Zoom fatigue</td></tr> <tr><td>UToledo budget constraints</td></tr> <tr><td>Oversaturation of non-profits</td></tr> <tr><td>Center staffing level</td></tr> <tr><td>Trend of family businesses selling to corporations and private investors</td></tr> </table>	Post-pandemic economy	Limited sponsorship structure	Membership structure and dues	Endowment size	UToledo bureaucracy	Keeping a hold on our niche (peer group competition)	Content development	In-person attendance/Zoom fatigue	UToledo budget constraints	Oversaturation of non-profits	Center staffing level	Trend of family businesses selling to corporations and private investors
Total membership: 265																																																			
Friends of the Center: 66																																																			
New leadership group: food industry cohort																																																			
Participation rate: 88%																																																			
Campaign gifts: \$250,000																																																			
Publish two journal/trade articles																																																			
Offer three niche certificate programs																																																			
Non-member PSP registrants: 10																																																			
Receive at least one grant																																																			
Social media metrics process/format	Megan																																																		
Secure \$50,000 campaign gifts/pledges	Angie																																																		
Launch PSP registry by Jan 15	Kurstyn																																																		
Add five more Friends of the Center (convert or new)/10 new members	Kurstyn																																																		
Launch two leadership groups	Kurstyn																																																		
Solidify KeyBank speaker and plan	Megan																																																		
Rebrand the FBSA	Angie																																																		
Reach capacity for certificate programs	Angie																																																		
Review peer equity data and formulate plan	Kurstyn																																																		
Identify grant opportunities	Angie																																																		
Proposal for new membership category	Angie																																																		
Post-pandemic economy																																																			
Limited sponsorship structure																																																			
Membership structure and dues																																																			
Endowment size																																																			
UToledo bureaucracy																																																			
Keeping a hold on our niche (peer group competition)																																																			
Content development																																																			
In-person attendance/Zoom fatigue																																																			
UToledo budget constraints																																																			
Oversaturation of non-profits																																																			
Center staffing level																																																			
Trend of family businesses selling to corporations and private investors																																																			