Austin Family Business Program

# FAMILY BUSINESS 360 - RFP

## Our Impact

Family Business 360 is the premier family business education series in Oregon.

- Selected advisors deliver to an engaged, energized audience of family business leaders, family members, and other key personnel
- Promotional materials are sent to roughly 4,000 family business contacts in Oregon and Washington
- Over 100 unique family businesses are served each season
- Audio podcast companion episodes featuring series presenters have been downloaded over 7,000 times, extending the reach beyond the breakfast events

## Your Expertise

Expert advisors with the experience, commitment and passion for working with family-owned enterprises are invited to propose presentations.

- 8 Opportunities in Portland Metro Area
  2 Opportunities in Seattle
  2 Opportunities in Salem
  4 Webinar opportunities
- Propose your session using the 2017/2018 topic list or submit an original idea based on your experience working with family business clients
- Be recognized as a leader in supporting family business education

**Proposals Due**
**July 24, 2017**

**Proposal Selections**
**August 4, 2017**

For complete details on the 2017/2018 Request for Proposals and to download the RFP package, please visit http://bit.ly/FB360RFP

"Perkin's participation in Family Business 360 is one our greatest investments. We grow personally and professionally from this educational experience and enjoy assisting Oregon Family business owners and their families."
- Don Bielen – Principal, Perkins & Co.

Oregon State University

# Topics of Interest for 2017/2018

Below is a sample of potential topics compiled from past attendee feedback. Other topic ideas from your practice area will also be considered. For a complete list of topics please download the RFP document from http://bit.ly/FB360RFP.

## Nurture the Family/Family Harmony

- Conflict resolution strategies for family members
- Cultivating better communication among family members, employees, and shareholders
- Addressing generational differences; differing goals of senior and junior generations
- Family meetings; how to start and maintain, and best practices
- How to structure employment policies for having family members, spouses & partners work in the family business

## Steward the Enterprises/Business Renewal

- Tax implications of succession plans; how to minimize impact and risk to the business
- How to structure buy-outs, shareholder agreements, buy/sell agreements
- Exit strategies for family members; buying out other family shareholders
- Best practices for management transitions to internal or external managers
- Comparison of FB ownership structures; ownership vs. profit sharing for key employees

## Generational Development

- Leadership, educational development opportunities for the next generation of family business leaders; strategies to involve the next generation in the family business
- Issues dealing with multiple potential successors; fair vs. equal considerations, how to make room in the business for talented family members
- How strategic hiring and key employees can aid in ownership transition
- How to incorporate new ideas/opinions from a younger generation into the strategic vision

## Who We Are

**Sherri Noxel, Ph.D.**
Director
Designing education to advance family business stewardship

**Roger Anderson**
Program Manager
Delivering targeted programs to support business leaders

**John Hasbrook, JD**
Online Instructor
Teaching the e-campus Family Business Management course

**Melissa Elmore**
Office Manager
Coordinating all administrative requirements

**Family Business Advisory Council**
20 professionals dedicated to family business education

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