

**The Austin Family Business Program
College of Business, Oregon State University
Family Business 360 – Request for Proposals
2019/2020 Season**

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1. Introduction

The Austin Family Business Program (AFBP) at Oregon State University is seeking professional advisors with experience, commitment, and passion working with family businesses to deliver presentations based on topics of interest to the family business community. Three types of Family Business 360 programs are offered: breakfast event presentations, afternoon “happy hour” presentations, and online webinars (for event descriptions see Section 4: Family Business 360 Program Description).

Professional advisors interested in participating in the 2019/2020 season of Family Business 360 should respond to this Request for Proposals. Selected presenters are required to pay a fee to the Austin Family Business Program (see “Section 3: Costs, Benefits and Responsibilities” for details).

Visit <http://business.oregonstate.edu/familybusinessonline> to learn more about the Austin Family Business Program and past program offerings.

For questions about this RFP or the Family Business 360 program, please contact Roger Anderson at roger.anderson@bus.oregonstate.edu or call 541.737.6017.

2. New Items in the 2019 Request for Proposal

- Optional 30 minute post-session for discussion of topic among attendees. Provides the presenter with an opportunity for additional engagement with family business owners. See Section 4: Family Business 360 Program Description.
- Addition of late afternoon “happy hour” event option. See Section 4: Family Business 360 Program Description.
- New pre-event marketing campaigns with presenter involvement. See Section 3: Costs, Benefits & Responsibilities,

3. Costs, Benefits & Responsibilities

Selected advisors are required to pay a fee to the Austin Family Business Program. This fee serves two purposes; to help defray the cost of promotion and program delivery, and to help support the AFBP in its mission to serve the family business community.

The AFBP will provide an invoice for the total amount due at the beginning of the season and fees are due no later than 30 days prior to your presentation date. The fees are as follows:

Portland Metro locations – \$2,500 per session

Salem location - \$1,500 per session

Webinar presentation - \$500 per session

Benefits to Presenter

In addition to leading a Family Business 360 presentation, advisors will receive:

- Featured in distributed program materials including program schedule mailers and email invitations. Direct mail (sent twice per season) will reach family business owners throughout Oregon and Washington. Email invitations are sent for each event.
- Listing in program materials distributed to partner and outside programs, e.g. chambers of commerce, OSU Alumni Association, trade groups, etc.
- Listing in the Family Business 360 program section of the AFBP website and the OSU event calendar, along with related AFBP and College of Business marketing efforts including annual Excellence in Family Business Awards Tribute magazine.
- Feature in a podcast interview that is available on the AFBP website and Apple Podcasts.
- Four complimentary event registrations, which may be used to invite family business clients of your choice.
- One complimentary FB 360 event registration which may be used for a colleague.
- Listing on the AFBP website “Supporters” page as a Family Business 360 presenter.

Responsibilities of Presenter

- Presentation creation and delivery, consistent with original proposal and selection committee feedback.
- Recruitment of family business owner to participate in presentation.
- Participate in pre-event promotion; may include a video promo or other social media content.
- Record a post-session podcast interview on day of event, schedule permitting
- Provide business cards and collateral for attendee packets.

Responsibilities of AFBP

The AFBP will be responsible for event planning & logistics, attendee registrations, coordinating handouts, and event promotion.

Past program information, and past presentation briefing papers including advisor biographies will be publicly accessible on the AFBP website at <http://business.oregonstate.edu/familybusinessonline> for public reference until the beginning of the following season. Podcast episodes are available indefinitely on OSU MediaSpace and Apple Podcasts.

Safe Harbor Environment

Feedback from past attendees is very clear and consistent about the desired role of advisors in educational programs. In order to foster an atmosphere of openness and allow the family business attendees to feel as comfortable as possible, information presented should be educational only and should not constitute solicitation. You may provide your contact information with your presentation, and you may include business cards and collateral for the attendee packets. Materials should be freely available to attendees at the time of the event or through the Austin Family Business Program after. Please note that attendee introductions are not made to maintain the privacy of the registrants, and registration lists will not be available to the presenter before or after the session. Colleagues of the presenter that attend will be seated together at a reserved table.

4. Family Business 360 Program Description

Launched in 2013, Family Business 360 (FB360) is a core component in the Austin Family Business Program educational portfolio. Family business owners, family members and key personnel who attend can network with one another, learn from top-caliber professionals, and gain solutions and next steps to their pressing family business issues. Suggested topics are detailed in Section 5: Session Objectives, Suggested Topics & Dates.

The 2019/2020 season will offer three presentation options: breakfast events (Portland and Salem), afternoon/“happy hour” events (Portland) and online webinars.

Presentations may be delivered by a single advisor or a panel of advisors. **All breakfast and afternoon presentations must include at least one family business owner as a panelist.**

Breakfast and Afternoon Formats

Breakfast events are scheduled from 7:30 am to 9:00 am on a weekday. Afternoon events are scheduled from 4:30 pm – 6:00 pm on a weekday.

- First 30 minutes: Attendees arrive and network with their peers
- Final 60 minutes: Presentation delivery, Q&A

Post Session

- As each presentation concludes, attendees will be invited to stay for an optional 30-minute discussion period among themselves. At this time the presenter may choose to participate in the optional discussion period or record the podcast interview depending on schedule availability.

Webinar Format

Webinars are scheduled from noon to 1:00 pm on a weekday, with the entire hour dedicated to the presentation and Q&A from attendees. Family business panelists are not required for webinars.

- Four separate webinar presentations are tentatively offered for the 2019/2020 season
- Webinars will be recorded and will be available for viewing online indefinitely
- Webinar attendance is unrestricted. Attendees may include family business owners, professional advisors, or community members

Attendee Information and Demographics

The Family Business 360 program attracts a diverse and highly engaged set of family businesses. Attendees are typically a mix of family business owners, managers, and other family business personnel (may include family members not yet working in the business e.g. successor generation or board members). Metro area sessions average 39 attendees, with attendance as high as 50+ depending on the topic and family business guest panelist. Webinars average 36 registrations.

Refer to the table below for a list of industry types and firm size typically represented.

Industry Types	Registered
Manufacturing	21%
Agriculture/Forestry	18%
Prof. Services/Trades	16%
Real Estate/Prop. Mgmt.	12%
Food & Beverage	9%
Supply Chain/Logistics	9%
Construction	5%
Other	10%

Firm Size (number of employees)	Estimate
>99	15%
25-99	30%
10-24	35%
1-9	20%

5. Session Objectives, Suggested Topics & Dates

The following section outlines the desired outcomes for each FB360 session along with suggested session topics, dates and locations for the 2019/2020 season.

Desired Session Outcomes

By the end of each Family Business 360 session, attendees should understand:

- The unique advantages and vulnerabilities of family-owned businesses in addressing this issue
- Examples of actions and outcomes for family business operations relative to the topic
- Recommended actions that families can undertake to reduce the problem or prepare themselves to meet with a professional advisor regarding the topic.

Topics of Interest

To ensure relevant content, highlight the presenters' expertise, and to offer more compelling and engaging material, desired topics will address specific problems that family businesses face. Topics are based on past attendee input regarding major challenges over the next 12 to 24 months.

Ideas for topics that are part of your practice area but not listed below are encouraged if they would be of great interest to the family business community. You can submit your own "Challenge/Topic" in your RFP response.

AFBP's educational focus supports the "Three Pathways" benchmark of successful multigenerational family enterprises identified by Dennis Jaffe, Ph.D. These pathways are 1) Nurture the Family, 2) Steward the Family Enterprises and 3) Cultivate Human Capital for the Next Generation.

Nurture the Family/Family Harmony

Practices that actively build shared vision and purpose over generations, promoting healthy communications and trust among family members, and stewarding the legacy of the family business.

- Establishing bonds and healthy working relationships between members of sibling and/or cousin groups.
- Communicating and managing relationships with non-active family members; not allowing business involvement (or lack thereof) to affect family relationships.
- Inclusivity issues; how spouses or extended family members should be involved in the business as active employees or shareholders.
- Holding effective family or shareholder meetings. General communication issues that prevent healthy relationships in the business and/or family.
- How family members manage their relationships when business roles change (some next generation members will become business leaders while others do not, or financial disparity increases between family members).

Steward the Family Enterprises/Business Renewal

Practices that preserve the family enterprise so that it is viable for future generations. This includes strategic wealth planning for family members, care and cultivation of boards of directors, shareholder agreements, and transparency with financial information and business decisions.

- Lack of readiness or interest from current generation in planning for the transition of the business; how to get owners to make decisions and start the process.
- How to plan for transition and succession, and how to execute transition with minimal impact to business operations or family dynamics.
- Onboarding and utilizing non-family key personnel, board members, or senior management. How non-family personnel can facilitate transition.
- Financing ownership transition to next generation of family in a way that allows successors to buy into business and owners to retire comfortably.
- Managing post-succession issues including financial instability, new governance structures, graceful exit of long-time owners, etc.

Cultivate Human Capital for the Next Generation/Generational Development

Practices to improve the personal and professional development of family members to prepare them for either contributing or leadership roles within the enterprise, or as informed shareholders or family members working outside of the business.

- How to incorporate next generation leaders into the family business; how to manage relationships between next generation leaders and long-time key employees.
- Leadership development of successors; how to prepare for management roles and eventual business ownership or shareholder role.
- How to structure ownership to protect family interests and the legacy of the business when transition will result in changing from one or two active owners to multiple active and non-active owners.
- Managing family involvement in the business, measuring performance and accountability, defining roles and expectations.

Locations and Dates

If your proposal is selected you will be scheduled to present on one of the tentative dates listed below. You can specify your preferred dates and locations in your RFP response. Locations not listed will be considered if proposed.

Portland Metro Area (8) (breakfast or afternoon events)

October – 10th
November – 7th
December – 5th
January – 16th
February – 13th
March – 12th
April – 16th (a.m. only)
May – 14th (a.m. only)

Salem (2) (breakfast events only)

March – 19th
May – 7th

Webinar (4 – dates flexible)

October
December
February
April

6. How to Respond to this RFP

Key dates to note for the RFP process

May 20, 2019 – RFP Released
June 5, 2019 – RFP Orientation Webinar
July 19, 2019– Proposals due in AFBP office
July 29 to August 2 – Family Business Selection Committee reviews and selects winning proposals. Respondents are notified of decisions and feedback from the Selection Committee.
October 2019 through May 2020 – Family Business 360 season

How proposals are selected

A group of family business owners and leaders has been selected by AFBP to review proposals. The following criteria will be used for selection from the submitted proposals. Please note that this is a competitive selection process and not all submitted proposals may be selected.

Instructions for Submitting a Proposal

Please respond to this RFP no later than the end of business on **Friday, July 19, 2019**.

Online responses (preferred)

You will first need to complete the “Signup for online access” process at the link below. You will then be able to access your RFP response form from any computer.

Step 1: Signup for online access: <http://bit.ly/RFP-Access>

Step 2: Online response form: <http://bit.ly/360-2019>

Alternative response methods

You may also send responses via email (attached as a Word or PDF file), fax, or hard copy via postal mail. Please note that if you choose to use postal mail, we must have your response in-hand by the due date of Friday, July 19th, 2019.

Email at roger.anderson@bus.oregonstate.edu

Fax at 541.737.5388, Attn: Roger Anderson

Postal Mail:

Roger Anderson
Austin Family Business Program
2751 SW Jefferson Way
Corvallis, OR 97331

Criteria for selection:

Capacity to Deliver

The selection committee will judge your responses based upon several factors relating to your experience and professional qualifications. Consideration will be given to your prior experience with the topic you are proposing, and your prior experience with family business clients. Past work with the AFBP, if applicable, will be considered as well.

Topic Selection

The selection committee will consider your topic selections and proposal content to determine how the chosen family business challenge would be addressed in your presentation.

Delivery

The selection committee will consider your presentation style and the key takeaways detailed in the RFP response.

Overall

The selection committee will look at all the criteria and discuss overall impressions of your proposal. Availability for open dates and locations may also play a role in selection.

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