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Request for Facilitating Services: Next Gen Executive I Affinity / Peer Group

Date of Issue: January 29, 2025

Due Date for Proposals: On or before Friday, February 14, 2025, by 5 p.m.

Contact: Catherine Wygant Fossett, Executive Director

Email to: catherine@fambusiness.org

Notes:

If you have questions, please submit them in writing no later than Friday, January 31, 2025 to Catherine at catherine@fambusiness.org. If you choose not to participate, please let Catherine know so she can remove you from consideration.

Background:

The Institute for Family-Owned Business (IFOB) is a nonprofit 501 (c) 3 organization committed to supporting, strengthening and empowering family-owned businesses throughout the state of Maine. Since 1994, the Institute has served family business owners, executives and employees through a wide range of continuing education programs, networking opportunities and consulting services. The Institute is a comprehensive resource for family-owned business.

Peer Advisory Groups at the IFOB:

The IFOB has several peer advisory groups that are small, confidential discussion groups of about 8-10 members that meet four to six times a year (meetings are generally two hours) and are facilitated by one or more local family business advisors. The group allows individuals to share experiences and learn from each other in a safe and open environment. These groups are for those actively working in a family business or who are interested in joining the family business, are IFOB members and in non-competing businesses. Ideally, only one member of a family will be in each peer group.

Members self-direct their topics exploring family business subjects of mutual interest, provide accountability and feedback, define issues of importance for each member, and discuss what to do (and not to do) in day-to-day interactions among family, owners, employees, and board members in order to make family leadership a competitive advantage.

NEXT GENERATION: Executive I – This group is made up of members who are working at the top management levels within their company i.e. Vice President, President, CEO, CFO levels. This group has been meeting for over 10 years with most of the same participants.

Objective:

The IFOB is looking for a coaching and consulting specialist to facilitate the Executive I Peer Advisory Group. The facilitator will work directly with the IFOB executive director, director of communications and the groups as needed.

Responsibilities:

1. Handle all administrative tasks related to the group, including scheduling, reminders, recap notes from each meeting and communications in coordination with the IFOB.
2. Work with the group to develop topics that are engaging and relatable.
3. Facilitate a discussion around the meeting topic for each meeting.
4. Work with the IFOB for any outside guest speakers.
5. Maintain full confidentiality at all times (including signing a confidentiality agreement) and do not engage in any overt solicitation of IFOB members.
6. Use the Member Portal to house information and discussions within the group.

General Timetable:

The work must be completed on a regular timeline from initial meetings, to follow up within a week of the meeting and scheduling topics for 2025 as the year progresses based on the group's feedback. We have a web-based Portal where we can share information and documents within the group.

Duration of Engagement:

This is for the 2025 year and we will reassess at the end of 2025.

Proposed Meeting Times for the Group:

We are thinking of Thursdays from 1-3 pm and planning 7 and expect to hold 6 meetings in Feb (this may need to be pushed out due to timing of the RFP), Mar, Apr, May, Jun, Jul and November. This group prefers to meet in-person and have a Zoom option if needed.

Proposal & Pricing Instructions:

Please prepare a written proposal, including cover letter, resume, three references and cost to facilitate 6 meetings, two hours each, (per session pricing) per year. Your proposal should include the kind of information that we will need to make our decision including why you would like to work with us as a facilitator for this group.

Please submit your experience with working with or in a family-owned business. Please provide any supporting articles, documents, experiences, etc. that you feel would be relevant to facilitating this group.

Thank you in advance for your consideration. We look forward to continuing our discussion.

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