STEWARDSHIP INSTITUTE

Education for family business success
RESPONSIBLE OWNERS ARE MADE, NOT BORN.

THE FAMILY BUSINESS STEWARDSHIP INSTITUTE prepares family business owners, shareholders, and stakeholders (including non-owner spouses and future owners) for effective stewardship of their family enterprise and for the significant and sometimes unpredictable transitions and decisions that must be made to determine the success and continuity of the family business.
SIX AREAS OF FOCUS

Taught by expert faculty, the Stewardship Institute’s comprehensive curriculum focuses on six key areas that play a vital role in the health and success of your family business. Participants are encouraged to apply what they learn to their own business, measure the impact, and share the results with fellow peers.

MANAGING RELATIONSHIPS  GOVERNANCE  LEADERSHIP

FINANCE  STRATEGY  TRANSITIONS
COHORT SIZE & FORMAT

FACULTY LEADER
Each new cohort is led by a Family Business Center faculty member who facilitates the group throughout their journey together.

PARTICIPANTS
Each new cohort is composed of 8-12 participants. Cohorts are a melting pot of family business CEOs, shareholders, family council members, non-family business employees, and managers.

TIMELINE
The Stewardship Institute meets 6 times over the course of 18 months (one meeting per quarter). Each meeting runs 2 days and focuses on one of the 6 topics mentioned previously. The final meeting includes a graduation dinner.

SAMPLE SCHEDULE

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<tr>
<th>MAR (2 DAYS)</th>
<th>JUN (2 DAYS)</th>
<th>SEP (2 DAYS)</th>
<th>DEC (2 DAYS)</th>
<th>MAR (2 DAYS)</th>
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<tbody>
<tr>
<td>TOPIC: MANAGING RELATIONSHIPS</td>
<td>TOPIC: GOVERNANCE</td>
<td>TOPIC: LEADERSHIP</td>
<td>TOPIC: FINANCE</td>
<td>TOPIC: TRANSITIONS</td>
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LOCATION
Meetings take place in the Schreiber Center located on Loyola’s Water Tower Campus at 16 E. Pearson Street, Chicago.
No other program out there offers this level of comprehensive family business education. Thought leaders, subject matter experts, and live case studies, along with confidential peer-to-peer learning, will help you develop a set of tools and resources to foster responsible and effective stewardship.

By enrolling in the Stewardship Institute, you join a trusted and confidential group of like-minded peers who will support you on your journey and help you develop a family strategy for responsible ownership. Many participants stay in touch with each other long after graduation.

“For anyone who has not spent time talking with other family business owners, I cannot express how valuable the Stewardship Institute is.”

JENNA JUDAY
COMMITTEE CHAIR
IDEAL INDUSTRIES

“The Stewardship Institute is a very worthwhile experience if your intent is to perpetuate your family business to the next generation.”

SUE KOLAVO
BOARD DIRECTOR
THE MINIAT COMPANIES, INC.
Our next cohort begins March 28-29, 2022.

If you’d like to learn more about the Stewardship Institute, please contact us. We would love to discuss how the program can help you, your family, and your business.

CONTACT US
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