

2023

REPORT

IMPACT

WAKE FOREST UNIVERSITY CENTER FOR PRIVATE BUSINESS



WAKE FOREST UNIVERSITY
CENTER for
PRIVATE BUSINESS

Our Mission

What is our goal?

It is our goal that the Wake Forest University Center for Private Business continues to be a catalyst for economic growth across North Carolina and is deeply embedded in the social prosperity of our region and beyond.

We enable privately-held businesses to thrive by helping them to achieve dreams for their business, family, employees, community, and stakeholders by providing access to industry leaders, resources, networks, and education.

Helping private companies build better business.

cpb.wfu.edu



Core Focus Areas

SUCCESSION PLANNING



It's never too early to plan. Our Members want to ensure their companies are being smart about their 10, 15-year plans as well as adequately investing in their next generation of leaders.

STRATEGIC PLANNING



Intentions matter. The Center brings in financing experts, HR professionals, leadership coaches and more to help our Members think through their growth strategies and company goals.

GOVERNANCE



Sophisticated companies have layers of leadership. Correctly utilizing an advisory board, executive committee or outside audit is paramount for effective and strategic governance.

FAMILY HARMONY



Finding success at the expense of relationships is not the goal. Keeping family ties strong in the face of stressful work requires commitment and coaching — especially for privately-owned family companies.

COMPANY CULTURE



Our Members care about their employees' experience. Pay equity, diversity, the blending of generational perspectives and work-life balance are valued in today's business world.

LEADERSHIP DEVELOPMENT



All leaders have strengths. All leaders have shortcomings. Our Members are eager to learn how to be more effective, self-aware, and confident leaders to further grow in their roles.



“

The Center’s significant growth in the 2023 fiscal year not only accentuates the exciting promise of our region’s economy, but it also evidences the spirit of North Carolina’s economy.

”

The Center for Private Business was founded to support and serve private companies in North Carolina based on the fundamental belief that private companies are the backbone of both our economy and community.

Our mission is to be a resource that enables companies to grow, achieve their dreams, and be intentional about not just working in the business, but on the business.

The Center’s significant growth in the 2023 Fiscal Year not only accentuates the exciting promise of our region’s economy, but it also evidences the spirit of North Carolina’s economy. This includes companies that carve out the monthly time to build stronger leaders, create inclusive and thriving company cultures, practice best in class governance, strategically prioritize growth and proactively prepare their businesses for the generations to come.

In the 2023 Fiscal Year, the Center strategically focused on retention and growth. We successfully launched three new regional Executive Committees composed of Sponsor and Member company leaders to solicit feedback, identify

programming needs and to grow our brand across North Carolina. With the help of our Executive Committee Members, we saw significant growth in every market, and have set our sights on opening a new market in Wilmington in 2024.

The coveted “Celebrate the Legacy” speaker series featured two Center for Private Business Member Companies and state leaders: Trademark Properties and Noble Food & Pursuits. Both stories included key insights around our core focus areas and illustrated the vibrant and resilient nature of our state’s business community. We are energized about continuing to further invest in this program series over the coming year by offering this series in every market!

As we look towards the year ahead, I am excited about closing in on 20 Forum peer groups, offering a robust program lineup and digging deeper into helping our Member companies be the best employers and leaders in the Southeast. We are humbled to witness in real time the impact your businesses make in the lives of your employees, stakeholders and communities. Thank you for your investment of time, energy and resources in the 2023 Fiscal Year, and we can’t wait to aid in your company’s success in the year to come!”

Lily
Lily Cochrane
EXECUTIVE DIRECTOR



Lily Cochrane
Executive Director,
cochralm@wfu.edu



Shelley Holmes
Associate Director of Membership &
Operations, holmesmm@wfu.edu



Lela Newell Ray
Assistant Director,
rayl@wfu.edu



Jack Clayton
Triangle Market Leader,
claytojj@wfu.edu



Andy Calhoun
Charlotte Market Leader,
calhouac@wfu.edu



Stan Kelly
Advisory Board, Board Chair



Drew Hancock
Advisory Board, Vice Chair



Ragan Folan
Advisory Board Member



Julia Jackson-Newsom
Advisory Board Member

FISCAL YEAR
2023

Programming

Most Attended Programs from June 2022 - June 2023

1. "True North" Leading Authentically in Today's Workplace"
2. "Building Your Portfolio: The Success of TradeMark Properties"
3. "Lessons in Scale: How Jim Noble Grew a Culinary Empire"
4. "A Conversation with Author Dr. William Lewis and Drew Hancock"
5. "Black Owned Table Talk: Black Burnout - Mental Health & Entrepreneurship"

webinars

"The Future of the Workplace" // August 16, 2022

"Thriving Through a Downturn" // January 18, 2023

2

workshops

"Building a Culture of Meaningful Mentorship" // September 14, 2022

"How Effective Leaders Understand & Work Through Conflict" - CLT // November 15, 2022

"How Effective Leaders Understand & Work Through Conflict" - Triad // December 6, 2022

"How Effective Leaders Understand & Work Through Conflict" - Triangle // December 13, 2022

"(Re)Set Your Money Journey" - CLT // March 29, 2023

"(Re)Set Your Money Journey" - Triad // April 12, 2023

"Creating a Culture of Feedback" // May 2, 2023

"The Power of Resilience - Managing Change & the Impact on Employee Engagement" // June 22, 2023

8

legacy speakers

"Building Your Portfolio: The Success of TradeMark Properties" // October 13, 2022

"Lessons in Scale: How Jim Noble Grew a Culinary Empire" // March 16, 2023

2

panels

"True North" Leading Authentically in Today's Workplace" // October 19, 2022

"Construction Roundtable" // October 25, 2022

"A Conversation with Author Dr. William Lewis and Drew Hancock" // February 16, 2023

"Black Owned Table Talk: Black Burnout - Mental Health & Entrepreneurship" // May 11, 2023

4

trainings

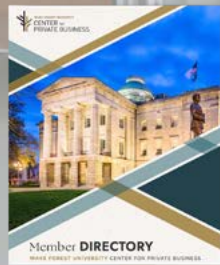
"Foundations of an Excellent Forum Moderator" // January 25, 2023

"Advanced Forum Exercises" // February 8, 2023

"Family Business Alliance" 2023 Conference // June 14-16, 2023

3

190 Members



Where can I find the Active Member Directory?

Our Member Directory, along with Key Contact information for each Member Company, is shared only with Active Members and can be found by logging into your account at cpb.memberclicks.net.

Member Companies by Geography

85 IN THE TRIAD & SURROUNDING AREAS

46 IN THE TRIANGLE & SURROUNDING AREAS

59 IN CHARLOTTE & SURROUNDING AREAS

Member Companies by Employee Size

13 Member Companies with 1,000+ Employees

31 Member Companies with 100-1,000 Employees

32 Member Companies with 50-100 Employees

114 Member Companies with 50 Employees or Less

Member Companies by Industry

- 8 ADVERTISING SERVICES
- 7 ARCHITECTURE & PLANNING
- 16 BUSINESS SERVICES
- 23 CONSTRUCTION
- 5 CONSUMER SERVICES
- 5 EDUCATION SERVICES
- 5 FACILITIES SERVICES
- 23 FINANCIAL SERVICES
- 10 FOOD & BEVERAGE SERVICES
- 2 FUNDRAISING
- 4 HEALTH CARE
- 7 INSURANCE
- 7 LEGAL SERVICES
- 19 MANUFACTURING & DISTRIBUTION
- 5 MARKETING & PRINTING
- 3 MEDIA
- 8 ORGANIZATIONS
- 13 REAL ESTATE
- 6 RECRUITING
- 8 RETAIL
- 6 TECHNOLOGY

45 New Members

joined The Center in Fiscal Year 2023!

In the 2023 Fiscal Year, The Center for Private Business experienced a correction in retention in each of our markets, as well as an unprecedented surge of post-pandemic growth. We welcomed 45 new Member companies into our vibrant community, which represents a 250% increase in membership. Our new Members are enthusiastic and highly engaged! We are grateful for our long-term Members and Sponsors, as they continue to be the Center's most vocal advocates and supporters. As we continue in our growth trajectory, we are so grateful for the trust and commitment of each of our Members. The growth in Center membership is a testament to the meaningful connections, resources and opportunities that the Wake Forest University Center for Private Business provides, reinforcing our position as a dynamic community for business professionals!

▲
Up 250% in New
Member Growth
from 2022!




Drew Blackwell,
Director of Water Efficiency

Cavanaugh & Associates, P.A.

"From large-company executives to small-business owners, Members let their guard down and meet each other as peers with fresh perspectives on similar challenges. Our company has experienced levels of collaboration and openness in the group that makes us excited for future programs and events. The Center staff does an excellent job finding top-notch speakers and workshops to serve the diverse Membership."



 Aprio MATTHEWS, NC FINANCIAL SERVICES	 Bobbitt Construction RALEIGH, NC CONSTRUCTION	 Brown Advisory CHAPEL HILL, NC FINANCIAL SERVICES
 Camellia Advisors, LLC SPARTANBURG, SC LEGAL SERVICES	 Carolinas Biofeedback Clinic PINEVILLE, NC HEALTH CARE	 Caroline's Cakes SPARTANBURG, SC FOOD AND BEVERAGE SERVICES
 Cavanaugh & Associates, P.A. WINSTON-SALEM, NC FACILITIES SERVICES	 Curi Capital RALEIGH, NC FINANCIAL SERVICES	 Derita Floral Supply Co. CHARLOTTE, NC RETAIL
 Express Med BELMONT, NC HEALTH CARE	 FedGrowth, LLC WINSTON-SALEM, NC BUSINESS CONSULTING AND SERVICES	 Five Points Capital WINSTON-SALEM, NC FINANCIAL SERVICES
 Flywheel Coworking WINSTON-SALEM, NC FACILITIES SERVICES	 Fred Kelly RALEIGH, NC BUSINESS CONSULTING AND SERVICES	 Goodwill Industries of the Southern Piedmont CHARLOTTE, NC ORGANIZATIONS
 Grant Thornton, LLP CHARLOTTE, NC FINANCIAL SERVICES	 GreenLyte Group, LLC CHARLOTTE, NC RECRUITING	 Happy Kat Candles & Gifts CHARLOTTE, NC RETAIL
 Informatic Concepts CHARLOTTE, NC RECRUITING	 JW Services Roofing Co. WINSTON-SALEM, NC CONSTRUCTION	 Kenna Custom Painting, Inc. RALEIGH, NC CONSTRUCTION
 Kennedy Office RALEIGH, NC RETAIL	 Lambert Design Group WINSTON-SALEM, NC ARCHITECTURE AND PLANNING	 Living Well, Inc. GREENSBORO, NC EDUCATION SERVICES
 Lockton Companies CHARLOTTE, NC FINANCIAL SERVICES	 LS3P Associates, LTD CHARLOTTE, NC ARCHITECTURE AND PLANNING	 Lynnwood Builders WINSTON-SALEM, NC CONSTRUCTION
 Minglewood Farm & Nature Preserve WESTFIELD, NC ORGANIZATIONS	 Morgan Corp. SPARTANBURG, SC CONSTRUCTION	 Oakworth Capital Bank CHARLOTTE, NC FINANCIAL SERVICES
 One Lucky Pup CHARLOTTE, NC CONSUMER SERVICES	 P Beckett RALEIGH, NC	 Patterson Pizza dba Domino's CHARLOTTE, NC FOOD AND BEVERAGE SERVICES
 Petroleum Transport Company, Inc. PILOT MOUNTAIN, NC MANUFACTURING & DISTRIBUTION	 Seasons Village RALEIGH, NC ORGANIZATIONS	 SL Divine Growth Consulting WINSTON-SALEM, NC BUSINESS CONSULTING AND SERVICES
 Spyglass Talent Solutions RALEIGH, NC RECRUITING	 Stimmel Associates PA WINSTON-SALEM, NC ARCHITECTURE AND PLANNING	 Sunnyside Millwork WINSTON-SALEM, NC CONSTRUCTION
 Team Connection, Inc. HIGH POINT, NC MANUFACTURING & DISTRIBUTION	 The Catalyst Board WINSTON-SALEM, NC BUSINESS CONSULTING AND SERVICES	 Viator Design & Construction WINSTON-SALEM, NC CONSTRUCTION
 Wilkerson Moravian Bakery WINSTON-SALEM, NC FOOD AND BEVERAGE SERVICES	 Woodie's Auto Services CHARLOTTE, NC CONSUMER SERVICES	 YMCA of Greater Charlotte CHARLOTTE, NC ORGANIZATIONS

Center Members in

Charlotte

and surrounding areas



Andy Calhoun,
Charlotte Market Leader

What impressed you most about business in Charlotte in 2023?

"Years ago I used to describe Charlotte as the "largest town or the smallest city" that you will come to know. Now, I must say that we clearly are a significant city much more than a town, adding over 40 new citizens a day to become one of the 10 fastest growing communities in the US. For now 5 decades I have seen Charlotte leaning in on issues and opportunities. It so excites me to witness and experience the strong sense of the "can do" spirit that has always defined our community and a collaborative and innovative culture of thoughtful, purposeful and responsible action and planning that is resourced by an abundance of terrific leaders who are not reluctant to step forward and step up."

Charlotte Executive Committee

Rebecca Adams Starr, CMO, Helen Adams Realty
Chad Shields, Senior Vice President, Lockton Insurance
Deven Carter, Owner, Home Foods LLC
Blake Narr, CLT Managing Partner, FORVIS
David Head, Managing Director, Grant Thornton
Brandon Allain, Associate, Barry, Evans, Josephs, and Snipes
Brandon Blell, Professional EOS Implementer, EOS Worldwide
Derrick Davis, Principal, Informatic Concepts

59 MEMBER COMPANIES
IN THIS AREA

+19 NEW MEMBERS JOINED
IN 2023 FROM CLT

+4 NEW FORUM MEMBERS
JOINED IN CLT

3 EVENTS HOSTED IN
CLT IN 2023

“

The Center has helped me to gain confidence as a 4th generation woman in business. Month after month, Forum provides the space to step away from warehouse operations to uncover pain points or think bigger picture, all with the support of similarly minded business leaders.”



Ashton Molster,
Vice President
Derita Floral Supply Co.

“

My Membership and Forum experience has been awesome! It has been a great decision for my company. I leave the sessions feeling as if I learned a lot. Being an entrepreneur can be lonely, so bringing certain issues to the group allows for other Members to share retrospection on how they handled a similar issue. That has really lessened the learning curve for certain issues. The Center has helped me become a better delegator and empowered my team to step up on days I am away.”



Ed Roper,
President
NJR Construction LLC

Do you know of a Charlotte area owner who would benefit from joining the Center? Send an email intro to Andy!

Center Members in the Triad and surrounding areas



Shelley Holmes, Associate Director of Membership & Operations

What impressed you most about business in the Triad in 2023?

"This year marks a pivotal moment for the Triad and the Center for Private Business as we are experiencing an exciting inflection point of growth and change. As the region becomes even more well-known for the strength of its entrepreneurial ecosystem, the tenacity of its core business sectors and the inclusivity and diversity of its resources and talent pool, we are now renowned as being a hub of success. Recently, there has been an impressive influx of new industries, technology providers and global corporations that are making a bold statement by choosing to locate, build and grow their companies for the future, right here in the Triad. It's clear that the Triad is a global contender in innovation, in limitless potential and in shaping an economic landscape that will benefit generations to come."

Triad Executive Committee

Coleman Team, Partner, Front Street Capital
Stephanie Fenner, Tax Partner, FORVIS
Tiffany Tate, CEO, Career Maven Consulting
Fletcher Wilson, President, Wilson Insurance Services
Amy Sparks, Vice President, Unique Background Solutions
Scott Rempe, Senior Vice President, Excalibur Direct Marketing
Susanne Hall, Executive Vice President, Wysong Services

85 MEMBER COMPANIES
IN THIS AREA

+17 NEW MEMBERS JOINED
IN 2023 FROM TRIAD

+12 NEW FORUM MEMBERS
JOINED IN TRIAD

11 EVENTS HOSTED IN THE
TRIAD IN 2023

“

I have gotten a great deal of value for both myself and my company from being a Member of The Center for Private Business. From the incredible workshops and sessions they offer, to the Forum group that I have been a part of since 2020, the Center is rich with programs that get to the core of my company's needs and pain points.”



Susanne Hall,
Executive VP, CFO
Wysong

“

The Center of Private Business has been such a vital asset to Friend Design & Architecture, whether it be through its open business resources or network of people! Being a part of a business Forum group has also been a lifeline as a leader in this community. I find it similar to having a board of directors with diverse backgrounds that endure the same struggles and shared experiences as business leaders and humans.”



Nisha Mary Prasad,
Partner, Friend Design &
Architecture

Do you know of a Triad area owner who would benefit from joining the Center? Send an email intro to Shelley!

Center Members in the

Triangle

and surrounding areas



Jack Clayton,
Triangle Market Leader

What impressed you most about business in the Triangle in 2023?

"The Triangle continues to experience quality growth as reflected in top ratings as the best place to live, work and buy a home. The expected influx of new jobs creates opportunities for private businesses to flourish throughout the region and attracts many highly educated graduates to move to the area. Surrounded by top tier research universities, Research Triangle Park is the largest research park in the county and a hub for innovation and technology. The diversity found in the cities that comprise the Triangle offers everyone a special spot, close to greenways and parks to be outdoors. These are all reasons Apple recently picked the Triangle for their \$1 billion campus and Durham for an engineering hub."

Triangle Executive Committee

Rick Guirlinger, CEO, Schwartz Advisors
Anna Ball Hodge, Hodge & Kittrell Sotheby's
Fred Kelly, Former CEO, Aeroglide
Bill Kibbe, CEO, Brookwood Construction
Jason Wilkinson, Market Leader, FORVIS
Bose Bratton, Wake Stone Property Company
John Risinger, Middle Market Leader, Truist
Jay Irby, Triangle Area Executive, First Citizens Bank
Allen Cobb, Certified EOS Implementer, EOS Worldwide

46 MEMBER COMPANIES
IN THIS AREA

+9 NEW MEMBERS JOINED IN
2023 FROM TRIANGLE

+8 NEW FORUM MEMBERS
JOINED IN TRIANGLE

3 EVENTS HOSTED IN THE
TRIANGLE IN 2023

“

My Forum group has been an incredible resource for my professional growth, providing a dynamic platform where the exchange of knowledge among fellow Members is truly invaluable. The insights and expertise shared within the group have significantly enriched my understanding and positively impacted my business acumen.”



Amy E. Carroll
President, Principal
Trademark Properties

“

I felt the impact of the Center immediately from my treasured Forum group to leadership training and development, to social gatherings and friendships. They have created a richness to the business community. The Center puts a lot of care and effort into the generational success of each Member's business. We're developing strong roots as a peer group to build something valuable and with character to pass onto the next generation.”



Tim Whitney,
CEO
Tradewinds

Do you know of a Triangle area owner who would benefit from joining the Center? Send an email intro to Jack!

Business Leader

Forum

The Center facilitated 18 Forum Groups across North Carolina in Fiscal Year 2023 and saw a surge of leaders investing in a growth mindset.

We're proud of the growth we saw in Forum during the Fiscal Year of 2023. We invested in our foundation and streamlined communication, processes, and resources so that we could continue to scale. We released the Forum Digital Library, redesigned the Forum Resource Menu and launched a monthly Forum newsletter, the Forum 411 to keep Members connected.

Thank you to all Forum Members for trusting us with your leadership journey!

We understand that joining a Forum group is a substantial time commitment for leaders already stretched for time. Our Members are bombarded with meetings, decisions that need to be made, and work on a never-ending cycle. Business waits for no one!

Every Forum Member we work with is making the dedicated decision to switch from a churn mindset, to a growth mindset. Instead of continuously putting out fires, our Members are building in time in their schedule to make sure their efforts remain long-term goal oriented.

We saw more leaders than ever build time for evaluation and strategy into their schedule, and we're grateful to facilitate that growth through Forum!

Lela Newell Ray
ASSISTANT DIRECTOR

NEW FORUM GROUPS ADDED IN 2023

3

TOTAL FORUM GROUPS

18

▲ up 120% from 2022

NEW FORUM MEMBERS ADDED

26

▲ up 113% from 2022

TOTAL FORUM MEMBERS

122

COMPANIES WITH 2+ FORUM PARTICIPANTS

18



The Center offers an Inclusion Fund for Underrepresented Owners to join Forum! Learn more at cpb.wfu.edu/membership.



How will Forum evolve in 2024? Our main goals!

Statewide growth is the main goal of Forum in the year ahead – and we've already made significant progress. By the time this Impact Report is published we will have successfully launched our 19th Forum Group and be well into laying the foundation for the 20th Forum. (A milestone number!)

It continues to be a primary focus to emphasize the strategic matching process of peers in each group. We're diving into the

diversity of background and thought that allows Forum peers to offer multiple vantage-points. This matchmaking is essential as Forum groups are not a leadership echo-chamber. When an issue is brought to a peer-group, Forum provides a safe-space for thoughtful discussion from a multitude of backgrounds.

It's our team's focus to find the most successful alchemy that allows for valuable discussion!

Forum groups are constantly growing! Don't hesitate to recommend Forum to a leader. Go to cpb.wfu.edu/programming/forum to see a deep-dive on this Center offering.



The Family Business Alliance

June 14 - 16, 2023

The Center for Private Business was honored to host the 2023 Family Business Alliance Conference at our headquarters in Winston-Salem, NC.

The Family Business Alliance was formed in 2003 as a way to learn from, and support Family Business Centers across the United States and Canada.

Various leaders from the approximately 50 centers are invited to come together for an annual conference focusing on best practices.

- SMITH FAMILY BUSINESS INITIATIVE AT CORNELL, NEW YORK
- FAMILY BUSINESS CENTER, UNIVERSITY OF LOUISVILLE, KENTUCKY
- GOERING CENTER FOR FAMILY & PRIVATE BUSINESS, OHIO
- WISCONSIN FAMILY BUSINESS CENTER, WISCONSIN
- CONWAY CENTER FOR FAMILY BUSINESS, OHIO
- UNIVERSITY OF ST. THOMAS, MINNESOTA
- ALBERTA BUSINESS FAMILY INSTITUTE, CANADA
- FAMILY BUSINESS ALLIANCE, PENNSYLVANIA
- THE HIGH CENTER, PENNSYLVANIA
- STEVENS CENTER FOR FAMILY BUSINESS, MICHIGAN
- ST. JOHN FISHER UNIVERSITY, NEW YORK
- PACIFIC ASIAN CENTER FOR ENTREPRENEURSHIP, HAWAII



Cara Sawai, Program Manager

Pacific Asian Center for Entrepreneurship, University of Hawaii

“This was my first Family Business Alliance conference and it was a great opportunity to network with others who support family enterprises around the country. I’ve formed a connection and network that is irreplaceable! I feel so fortunate to have met so many amazing people.”



Daniel Van Der Vliet, Executive Director

Smith Family Business Initiative, Cornell University

“The Family Business Alliance, an association of university affiliated family business programs, gathers once a year to discuss current topics and associate with our peers. In 2023, the Wake Forest Center for Private Enterprise hosted our annual gathering and created one of our most memorable conferences to date. The Center for Private Business team executed a flawless experience.”



Carol Butler, President

The Goering Center for Family and Private Business, University of Cincinnati

“The Family Business Alliance Conference was a fruitful gathering of diverse family business centers fostering collaboration and sharing valuable insights. Old friendships were renewed as well as new friendships made. This was a wonderful conference – much appreciation to the Wake Forest Center for Private Business for hosting this important and impactful event.”

1

Goal: Strategize how to best serve our Members in 2024.

Each Center shared parts of their strategic plan for 2024 and provided relevant resources used to plan for the looming challenges faced by private companies on a national scale.

2

Goal: Compare most impactful programming and speakers.

We compared notes on which speakers resonated with our Members and the topics of interest that garnered the most engagement within our programming calendars.

3

Goal: Educate on successful peer group strategies.

Each Center shared their approach to peer group, or Forum, best practices and we worked through how to better provide impactful mediation, training and support.

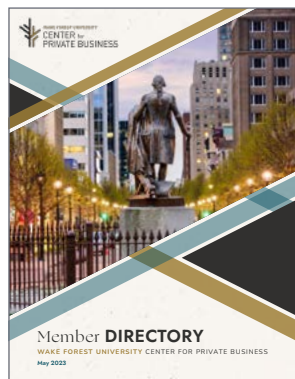


1



Brand New Design for the Member Directory

Published for the first time in December 2022, and the second time in May 2023, the updated Member Directory organizes each Member Company and Sponsor by industry and includes relevant information on the company and Member contact.



2

Forum Retreat Resource's Compiled & Presented

The Forum Retreat Resource Menu was created and presented to all Forum groups so that our Forum Members can utilize this information in an organized, sharable fashion.



3

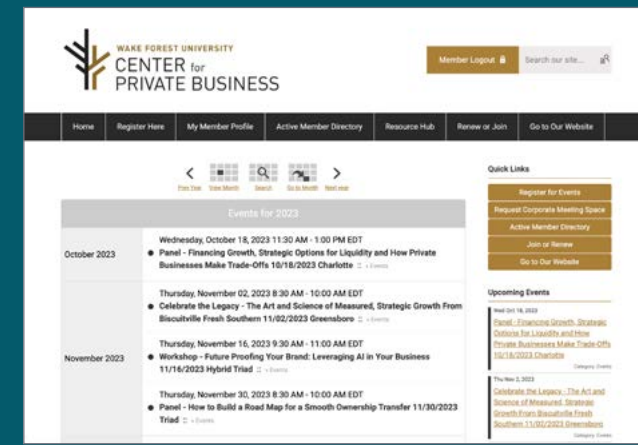
New Email Newsletter! Forum 411 for Forum

We launched a newsletter exclusively for Forum Members to stay connected to their group, and overall Forum leadership. It's published on a monthly basis.

4

Redesign of the Member Portal

A much-needed reorganization of our Member Portal happened in Fiscal Year 2023. It's easier than ever to access relevant Resources, register for Events or find the Active Member Directory.



5

Bi-Monthly Email Communications

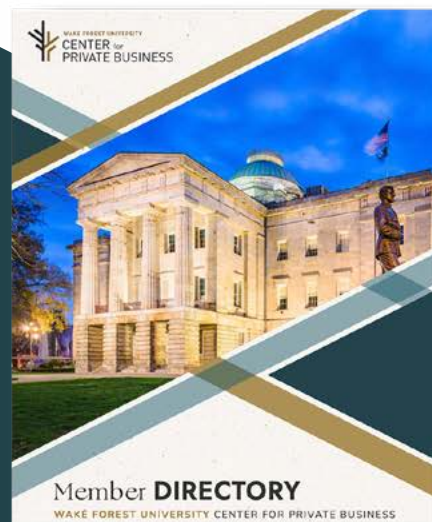
News from the Center sends out on a bi-weekly basis and our engagement rates remain high! The newsletter offers information on Center events, achievements of our Members, community opportunities and more.



6

Full Semester Lineups for Spring / Fall Events

A big achievement of Fiscal Year 2023 was compiling and showcasing the Fall 2022 Program Calendar and the Spring 2023 Program Calendar. We want to make it easier than ever to plan for attendance and schedule events far in advance!



Communication Achievements

Center Offices

Updates in 2023

Pictured is the newly renovated conference room, located within the Center for Private Business offices with seating for eight attendees. This room is available by special request only to Members and Forum Participants, and offers wall-to-wall windows overlooking Downtown Winston-Salem.

This year we also redesigned our Event Space Packet, an easy-to-use informational document that outlines each bookable space. Our payment structure received an update in order to better facilitate outside groups booking at 500 West 5th.

Book meeting space, free to Members!

Five bookable spaces are provided as a membership benefit at no additional cost. Member companies may utilize conference and event spaces for off-site team meetings, lunch and learns, workshops and Forum meetings.

Browse room details and inquire about booking a space for your next company meeting. Go to cpb.wfu.edu/the-center/our-space/500-w-5th for room details and more.

500 W. 5th Street, Winston-Salem



MEMBER EVENTS
HOSTED

291

▲
up 154%
from 2022



TOTAL MEMBER
ATTENDEES

2,160



OUTSIDE GROUPS
HOSTED

90



TOTAL OUTSIDE
ATTENDEES

2,721

▲
up 208%
from 2022



TENANT MEETINGS
HOSTED

76























TOTAL TENANT
ATTENDEES

881

Sponsors

2023 SPONSORS AND FRIENDS OF THE CENTER

 Truist	 First Citizens Bank		
 The Truist Leadership Institute	 Flow Automotive		
 First Bank	 FORVIS	 EOS Worldwide	 Kaplan Early Learning
 Kilpatrick Townsend	 Front Street Capital	 The Budd Group	 Brown Brothers Harriman
 Towne Bank	 Smith Leonard Accountants	 Foundation for the Carolinas	 Pinnacle Financial
 Towne Insurance	 Manning Fulton	 Womble Bond Dickinson	 United Community Bank

Friends of the Center: Graham Bennett, Don & Robbin Flow, Ragan & Dara Folan, Drew & Kelley Hancock, Stan & Liz Kelly, Randall & Claire Tuttle, Ed Weisiger, John & Brenda Woodcock



Jason Clubb
EOS Worldwide

At EOS Worldwide, we are honored to sponsor and support such a great organization that aligns so closely with our passion to help business owners run better businesses and live better lives. From our perspective, the impact of The Center for Private Business cannot be overstated. Its support has a significant multiplier effect. Healthier businesses mean happier business owners, leaders, and employees. This leads to healthier communities and families. And healthier communities mean a high quality of life characterized by abundance.”



Aprille Bell
FORVIS

With a deep history rooted in North Carolina, FORVIS is passionate about serving private businesses, the backbone of our economy. For years, a sponsorship with Wake Forest Center for Private Business has been a natural fit for FORVIS, providing us opportunities to consult with a purpose to deliver value to private business across North Carolina.”

How do Sponsors drive growth? Our focus in 2024!



#1: OPERATIONAL SUPPORT

Enhanced operational support to enable the Center to offer best in-class resources for programming & Business Leader Forum.



#2: VETTED NETWORK

Streamline vetted network connections and referrals: providing resources and consultants that understand the unique challenges of private and family-owned companies.



#3: SUBJECT MATTER EXPERTS

Identify subject matter experts to facilitate workshops and moderator panel discussions around our six core focus areas.

- Level 1
\$3,000+ / year
- Level 2
\$10,000+ / year
- Level 3
\$20,000+ / year

Take your community impact to the next level by becoming a Center Sponsor!
Go to cpb.wfu.edu/the-center/our-people/sponsors to learn about benefits of each level.



WAKE FOREST UNIVERSITY CENTER FOR PRIVATE BUSINESS

500 W. 5th Street, Suite 300, Winston-Salem, NC 27101

CPB.WFU.EDU