Preliminary Agenda

8am - 8:30am: Registration, Networking and Breakfast
Breakfast sponsored by Blue Ridge ESOP Associates
Free Parking - sponsored by Mills, Potoczak & Company

8:30am - 9am: Morning Welcome - Chris Cooper
Economic Outlook for 2024 - Thomas Jalics, Fifth Third Bank

9am - 9:15am: Short Break

9:15am -10:30am: Concurrent Sessions One

CEO/CFO Roundtable
Join your peers for an open-ended discussion on issues and challenges in your ESOP company – nothing is off limits, and the agenda is yours. To maintain confidentiality and encourage open discussion, this session is limited to C-suite leaders from ESOP companies only.
Presented by
Chris Cooper – Ohio Employee Ownership Center

Things You Should Know: Administering Your ESOP
Whether you are a new ESOP company, or someone taking on a new role at an existing ESOP company, this session will provide a primer on what you need to know about administering your ESOP. From compliance to managing ongoing tasks throughout the year, this session will highlight best practices and provide you with necessary information to do the job.
Presented by
Pete Shuler – Blue Ridge ESOP Associates
Gary Dick – Cornerstone Controls, Inc.

Is there an app for that?
Leveraging Communication Platforms for Timely Messaging and Culture Building
Regardless of your industry or makeup of your workforce, more and more of our communications are moving online and digital. But not all platforms are the same, and new technologies are changing how we learn and engage with information. Relying on the practical experiences of other employee-owned companies this session will discuss the benefits and limitations of digital platforms and how they can be creatively used and combined to achieve better communications and even build an ownership culture.
Presented by
Amber Ferrell and Elisabeth Cox – FST Logistics

10:30am - 10:45am: Short Break

10:45am - 12pm: Concurrent Sessions Two

Recruitment and Retention: Thinking Beyond the ESOP Account
Research finds that being employee owned has a positive impact on recruitment and retention. But how is that achieved? Does a technical explanation of how an ESOP works resonate enough to attract and retain talent? Most likely not. For new ESOP companies, and new hires at mature companies, the financial benefits of the ESOP aren’t immediate. Relying on practical examples and proven strategies, we will discuss how areas often seen as “outside” the ESOP – programs, policies, mission, and values of your company – can be used to recruit and retain talent while building a strong workplace culture.
Presented by
Amber Ferrell and Elisabeth Cox – FST Logistics
10:45am - 12pm: Concurrent Sessions Two - Cont.

**Repurchase Obligations: Strategies Beyond Cashflow**

More often than not, ESOP companies rely mainly (or even solely) on cash flow to finance their repurchase obligation. As ESOP companies continue to out-perform the stock market, you need to utilize a broader approach to managing this essential function of your ESOP, learn more at this session.

**Presented by**
Matt Silla – Apple Growth Partners
Pete Shuler – Blue Ridge ESOP Associates

**ESOP Leadership and Board of Directors Forum**

At this open-ended and moderated discussion, you will have the opportunity to engage in conversation with others about the challenges and solutions to the full range of leadership and governance issues. This session is ideal for new ESOP companies finding their way; new or next-generation leaders at existing or mature ESOPs; board members; and others involved in running your company.

**Presented by**
Rick Van Doel – Indiana Center for Employee Ownership
Keith Packard – Ever-Roll Specialties
Chris Cooper – Ohio Employee Ownership Center

**Planning Your 2024 Communications Year: Creating A Calendar That Works**

It takes time and effort to create successful ESOP events. First you need fun and interesting things to do that don’t forget the employee ownership; next you need to figure out how to do them effectively; then you need to schedule the events and make sure they stay within budget – all while taking care of your day job! This session is designed to get you on the right track with your 2024 ESOP events, provide insight and ideas to make those events engaging, and give you the space and time needed to develop a communication plan for the upcoming year. Come ready to share your ideas too!

**Presented by**
Lori Robinson and Michelle Schneider – Parallel Technologies, Inc.

12pm - 12:30pm: Lunch
Sponsored by GBQ Capital Advisors

12:30pm - 1pm: Taking Advantage of Existing Government Programs
Michael Kahoe, Governor’s Office of Workforce Transformation

1pm - 1:15pm: Networking Break

1:15pm - 2:30pm: Concurrent Sessions Three

**HR Professionals Roundtable**

Join your HR peers for an open-ended discussion on all things HR – recruitment and retention practices, administration, communications, and other topics, the agenda is yours! To maintain and encourage open discussion, this session is limited to HR professionals in ESOP companies only.

**Presented by**
Melissa Henderson – BRP Manufacturing Company
Mike Palmieri – Ohio Employee Ownership Center

Contact Us
oeoc@kent.edu or 330-672-3028
1:15pm - 2:30pm: Concurrent Sessions Three - Cont.

Building Your Bench: Company Sustainability and Leadership Training at Your ESOP Company

What makes for a resilient employee-owned company? Making and managing cash is clearly important, but just as important is a strong organizational structure and culture that drives performance over the long term. This session will provide strategies and practices for developing and supporting leadership; aligning the corporate and employee ownership philosophies so they work together and not against each other; and connecting the ownership culture with the organizational structure.

Presented by
David Horvath – Prairie Capital Advisors

Things You Should know: Company Value and Your ESOP Valuation

It’s the one number that everyone wants to know – but what does it mean, and how is it determined? This session will provide a grounding in what creates value; how the value of your ESOP company is measured; and maybe a tip or two on how to communicate value to your employee owners. This session is ideal for new ESOP companies; new or next-generation leaders, and those tasked with communicated value to participants.

Presented by
Brian Bornino – GBQ Capital Advisors
Brad Minor – Blue & Co.

2:30pm - 4pm: End of Year Reception Lobby

Join us for appetizers and drinks as we celebrate the end of 2023.

Special Thanks to Our Sponsors & Network Members

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EON Employee-Owned Network
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