

Preliminary Conference Agenda



40th Annual
Ohio Employee
Ownership Conference
April 22-23, 2026

Wednesday, April 22nd - Preconference

Every year the OEOC runs pre-conference events including:

3pm-5pm - CEO Roundtable *

3pm-5pm - CFO Roundtable *

3pm-5pm - HR Roundtable *

5pm-7pm - Opening Night Reception with drinks and appetizers**

* To encourage open discussion, roundtable attendance is limited to members from employee-owned companies.

** Opening night reception is \$40 per individual. **No charge** if registered for the April 22nd pre-conference roundtable or the April 23rd full conference.

To register for pre-conference events [**fill out this form**](#) and email it to Kelly Fitts at kfitts@kent.edu

Thursday, April 23rd - Full Conference

Each year the OEOC's Annual Conference features an interesting mix of featured speakers and 20-plus breakout sessions for management and leaders of employee-owned companies, rank and file employee-owners and business owners interested in selling to their employees.

7:30am – 8:30am - Registration and Continental Breakfast

8:30am – 8:45am - Morning Welcome

8:45am – 9:30am - Keynote Presentations- Tim Rettig

9:30am – 9:45am - Networking Break

9:45 – 10:45 - Concurrent Panels One

10:45am – 11:00am - Networking Break

11:00am – 12:00pm - Concurrent Panels Two

12:00pm – 1:15pm - Lunch & Ohio Employee Ownership Awards

1:15pm – 1:30pm - Networking Break

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

2:30pm – 2:50pm - Afternoon Coffee Break

2:50pm – 3:50pm - Concurrent Sessions Four

3:50pm – 5:00pm - Closing Reception - (Patio Weather Permitting)

Preliminary sessions are listed on the next page



Preliminary Sessions by Track

As we do every year, the sessions at our conference will be organized by tracks, ensuring that every employee owner can enjoy a full day of engaging topics and speakers.



40th Annual
Ohio Employee
Ownership Conference
April 22-23, 2026

Legal and Technical

- Repurchase vs. Sustainability Analysis: What's the Difference?**
Alex Grasser, *Prairie Capital Advisors*
- Connecting the Dots: Distribution Policy and Repurchase Strategy in ESOPs**
Tina Langlois, *Chartwell Financial Advisory*
Lori Stuart, *SCJ Fiduciary Services*
- Developing Your Acquisition Strategy for Strategic Growth** - Speakers TBD
- Acquisition Mechanics for ESOP Leaders: From Target to Close** - Speakers TBD
- Managing an ESOP: An Administrative Overview and Q&A** - Speakers TBD

Governance, Leadership, and Best Practices

- Basic Duties Of Board Members and Trustees**
Joe Yonadi
Kjersti Cory, *SCJ Fiduciary Services*
- New Employee Ownership Research, and Tools to Put it Into Practice**
Michael Palmieri, *Ohio Employee Ownership Center*
Adria Scharf, *Rutgers Institute for the Study of Employee Ownership and Profit Sharing*
- Women Leadership Roundtable** - Moderators TBD
- Managing Growth and Change Without Losing the Cooperative** - Speakers TBA

HR, Communications, and Culture

- Total Reward Benchmarking: How to Reinforce Trust, Motivation, and Long-Term Value Creation**
Michael McGrath, *McGohan Brabender*
- Culture Isn't What You Say- It's What Managers Do**
Jon M. Sweigart, *Praxis Consulting Group*
- Building and Sustaining a Cooperative Culture** - Speakers TBD
- Beyond Statements and EO Month: Building Year-Round ESOP Culture** - Speakers TBD

Essential Employee Owner Education

- ABCs of Worker Cooperatives for Worker Members**
Jonathan Welle, *Cleveland Owns*
- ABCs of ESOPs for ESOP Participants**
Michael Palmieri, *Ohio Employee Ownership Center*
- Basics of Business Financials for Employee-Owners** - Speakers TBD
- Retirement and Financial Planning for Employee Owners** - Speakers TBD

Selling Owner

- From Feasibility to Reality: Horizon's Journey to Employee Ownership ESOP**
Brian Bornino, *GBQ Capital Advisors*
Herb Wainer, *Horizons Incorporated*
- Taking The Helm: What Every New ESOP Leader Needs To Know**
Amanda Strickler, *Chartwell Financial Advisory*
Andrew Adolph, *Eide Baily*
Mark Swanson, *Blue Ridge Associates*
- Beyond the Numbers: The Importance of Qualitative Factors in Your ESOP Valuation**
Eric Flickinger, *Eide Baily*
Jason Venner, *Clampco Products, Inc.*
- Selling Your Company to a Worker Cooperative or Employee Ownership Trust** - Speakers TBD

Special Thanks To Our Sponsors

PLATINUM Sponsors



GOLD Sponsors



SILVER Sponsors



BRONZE Sponsors

CPAs / ADVISORS



J.P. Morgan

