Outline

DAY 1 – Monday, October 12

- Understand motivation and how to contribute to and enhance the success of an organization
- Explore the underlying decisions that define employee ownership and investigate the factors that create an ownership culture
- Understand the effect of employee ownership on the governance of your company
- Help frontline leaders to implement organizational change
- Understand the individual needs of employees in your firm
- Confront the issue of sustainability of employee-owned companies
- Sell the intangible benefits of your company to customers both within and without

DAY 2 – Tuesday, October 13

- Position your company within the competitive marketplace
- Learn techniques to manage toward value creation
- Identify ways that individuals contribute to the short- and long-range goals of the company
- Explore the areas of innovation and growth in an employee-owned environment
- Understand and implement the role of employee ownership in strategic planning
- Prepare individuals in your company for strategic change
- Go beyond open book management sharing financial information with employees

DAY 3 – Wednesday, October 14

- Explore an exemplar of employee ownership
- Apply practical tools for implementing management techniques
- Share experiences with peers through interactive discussion
Preliminary Agenda

SUNDAY, OCTOBER 11

6:30-9:00  Opening Dinner Reception - Networking
Location: Sheraton La Jolla Hotel, Executive Room

Welcome
Martin Staubus
Beyster Institute at the Rady School of Management

MONDAY, OCTOBER 12

7:15  Shuttle pick-up at Sheraton La Jolla Hotel for transport to Rady School of Management

7:30-8:00  Breakfast
Location: UCSD Rady School of Management, Otterson Hall, 4th Floor
Executive Education Auditorium

8:00-9:00  Introductions – Setting the Agenda
Anthony Mathews
Tab 1

9:00-10:00  Your Company: Purpose and Values
Martin Staubus
Tab 2

10:00-10:15  Break

10:15-11:00  Employee Ownership Management Strategies: Who Runs an ESOP Company?
Anthony Mathews
Tab 3

11:00-12:30  Banking and Finance for EO Companies
Elisabeth Schutz
Tab 4

12:30-1:30  Lunch

1:30-2:30  Employee Ownership Sustainability Part 1 – Philosophical and Cultural Underpinning
Anthony Mathews
Tab 5

2:30-2:45  Break

2:45-3:45  EO Implications for Strategic Planning
Anthony Mathews, Elisabeth Schutz
Tab 6

3:45-4:45  Employee Ownership Companies in the Growth Mode: Acquisitions and Mergers
Elisabeth Schutz, Martin Staubus
Tab 7

4:45-5:00  Day One Wrap-up and Reflections
John Hoffmire, Anthony Mathews

5:15  Shuttle pick-up at Rady School of Management for transport to Sheraton La Jolla Hotel
TUESDAY, OCTOBER 13

7:15 Shuttle pick-up at Sheraton La Jolla Hotel for transport to Rady School of Management

7:30-8:00 Breakfast
   Executive Education Auditorium

8:00-8:30 Learnings from Day One – Reset the Sails
   John Hoffmire, Martin Staubus

10:00-10:15 Break

10:15-11:15 Employee Ownership Sustainability Part 2 – Practical Design and Implementation Reflections of an Ownership Culture
   Anthony Mathews

11:15-12:00 Improving Employee Understanding of Company Finances
   Martin Staubus

12:00-1:00 Lunch

1:00-2:00 Selling the Intangible Benefits of Your Company – Internal and External Customers
   Martin Staubus

2:00–2:45 Growth through Disruptive Innovation
   John Hoffmire

2:45-3:00 Break - Networking

3:00-5:00 Creating and Delivering the Employee Ownership Message – A Practicum Lab
   John Hoffmire, director of the Said Global Entrepreneur Network and associate fellow at Oxford University’s Said Business School

3:45-5:00 Managing for Growth and Value Enhancement – The Blessing of a Patient Investor
   Facilitated group discussion

5:00-5:15 Day Two Wrap-up and Reflections
   Martin Staubus

5:15 Shuttle pick-up at Rady School of Management for transport to Sheraton La Jolla Hotel
WEDNESDAY, OCTOBER 14

7:15 Shuttle pick-up at Sheraton La Jolla Hotel for transport to Rady School of Management

7:30-8:15 Breakfast and networking

8:15-9:15 The Nature of Leadership in an Employee-Ownership Company
Anthony Mathews and John Hoffmire

9:15 Shuttle pick-up at Otterson Hall for transport to site visit

10:00-11:30 Exemplar ESOP Site Visit: R. W. Smith Company

11:30-1:00 Return to the Sheraton Hotel / Lunch