

## Employee Ownership Management

UC San Diego Rady School of Management  
October 18-21, 2009

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### Outline

#### DAY 1 – Monday, October 19

- Understand motivation and how to contribute to and enhance the success of an organization
- Explore the factors that create an employee ownership
- Help front line leaders to implement organizational change
- Understand the effect of employee ownership on the governance of your company
- Make sense of the independently determined value of your firm
- Go beyond open book management sharing financial information with employees
- Understand the individual needs of employees in your firm
- Identify ways that individuals can contribute to the short- and long-range goals of the company

#### DAY 2 – Tuesday, October 20

- Position your company within the competitive marketplace
- Understand the impact of globalization in your company
- Learn competitive techniques in a globalizing economy
- Explore the areas of innovation and growth in an employee owned environment
- Prepare individuals in your company for strategic change
- Sell the intangible benefits of your company to customers
- Coach employees in how to market your firm

#### DAY 3 – Wednesday, October 21

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

# Agenda

## SUNDAY, OCTOBER 18

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

**Welcome Address**  
Anthony Mathews  
*Beyster Institute at the Rady School of Management*

## MONDAY, OCTOBER 19

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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, 4<sup>th</sup> Floor*

8:00 - 9:00 **Welcome and Introductions**  
Anthony Mathews and Sid Scott

9:00 - 9:30 **Ownership Expectations of Employee Owners**  
Sid Scott, *VP of HR, Woodward Communications & Adjunct Instructor, Univ. of Wisconsin*

9:30 - 9:45 Break

9:45 -10:45 **Employee Ownership Management Strategies: Who Runs an ESOP Company?**  
Anthony Mathews

10:45 - 11:00 Break

11:00 -12:30 **Employee Ownership Management Strategies: Positioning and Marketing Your Company**  
Sid Scott

12:30-1:30 Lunch

1:30 – 2:45 **Presenting Your Companies' Value Propositions**  
John Hoffmire, *Director of the Center on Business and Poverty University of Wisconsin School of Business*

2:45 - 3:15 Break

3:15 - 3:45 **Social Implications of Employee Ownership**  
John Hoffmire

3:45 - 4:30 **Employee Ownership Culture Building**  
Anthony Mathews

4:30 – 5:00 **Day One Wrap-up and Reflections**  
John Hoffmire, Sid Scott and Anthony Mathews

5:15 Shuttle Pick-Up at Rady School of Management for Transport to Sheraton La Jolla Hotel

## TUESDAY, OCTOBER 20

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- 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, 4<sup>th</sup> Floor*
- 8:00 - 8:30 **Learnings from Day One – Reset the Sails**  
Sid Scott  
*Location: UCSD Rady School of Management  
Otterson Hall, 4<sup>th</sup> Floor, Executive Education Auditorium*
- 8:30 – 10:15 **Employee Ownership Management Strategies: Managing to Create Value**  
Rob Fuller, *Director of Entrepreneurial Programs*  
*Beyster Institute at the Rady School of Management*
- 10:15 - 10:30 Break
- 10:30 – 12:15 **Operating your Employee Owned Company in a Global Economy**  
John Logue, *Director*  
*Ohio Employee Ownership Center*
- 12:15 -1:30 Lunch
- 1:30 – 3:30 **Employee Ownership Management Strategies: Managing for Innovation and Growth**  
Vish Krishnan, *Professor of Innovation, Technology & Operations*  
*UCSD Rady School of Management*
- 3:30 – 3:45 Break
- 3:45 – 4:30 **Employee Ownership: Future Trends and Challenges**  
John Hoffmire, Sid Scott and Anthony Mathews
- 4:30 - 5:00 **Day Two Wrap-up and Reflections**  
Anthony Mathews
- 5:00 Shuttle Pick-Up at Rady School of Management for Transport to Sheraton La Jolla Hotel

## WEDNESDAY, OCTOBER 21

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- 7:45 - 8:30 Shuttle Pick-Up at Sheraton La Jolla Hotel for Transport to Site Visit
- 8:30 - 11:00 **Site Visit**  
Hot Dog on a Stick Corporate Office– Carlsbad, CA
- 11:00 - 11:30 **Communities of Practice:  
Bringing it All Together to Effectively Lead an Employee-Owned Company**  
John Hoffmire, Sid Scott and Anthony Mathews
- 11:30-1:00 Lunch  
Hot Dog on a Stick Carlsbad Outlet Mall  
Return Shuttle to Sheraton La Jolla Hotel