Employee Ownership Management

Agenda

MONDAY, OCTOBER 14

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

7:30-8:15  Breakfast
*Location: UCSD Rady School of Management, Executive Education lobby*

8:15-8:30  Introductions – Setting the Agenda
Martin Staubus

8:30-9:30  Who Runs an ESOP Company? Corporate Governance
Martin Staubus

9:30-11:00  Operating Your ESOP: Processes and Procedures
Kim Blaugher

11:00-11:15  Break

11:15-12:30  Banking and Finance for ESOP Companies
Leah Turnbull

12:30-1:30  Lunch

1:30-3:00  Managing the Growth in Value of your Company
Martin Staubus

3:00-3:15  Break

3:15-4:15  ESOP Companies In Growth Mode: Organic and Acquisition
Leah Turnbull and Martin Staubus

4:15-4:45  Day One Wrap-up and Reflections
Martin Staubus

5:00-6:00  Opening Evening Reception
Featuring Modern Times Brewing

6:05  Shuttle pick-up at Rady School of Management for transport to Sheraton La Jolla Hotel
TUESDAY, OCTOBER 15

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

7:30-8:15 Breakfast
  Executive Education Lobby

8:15-8:30 Learnings from Day One – Reset the Sails
  Martin Staubus

8:30-10:00 Growth through Disruptive Innovation
  John Hoffmire

10:00-10:15 Break

10:15-11:15 Innovation Driven by by Employee Ownership: SAIC
  Mary Ann Beyster

11:15-12:15 Strategic Planning for ESOP Companies
  Martin Staubus

12:15-1:15 Lunch

1:15-2:15 Engaging Employees in Company Goals
  Martin Staubus

2:15-3:15 Employee Ownership: Philosophy and Culture
  Jennifer Briggs

3:15-3:30 Break - Networking

3:30-4:15 Employee Ownership in Marketing
  Thomas Dudley

4:15 – 5:00 Internal Marketing – Recruiting and Retention
  Martin Staubus

5:15 Shuttle pick-up at Rady School of Management for transport to Sheraton La Jolla Hotel
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<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:15</td>
<td>Shuttle pick-up at Sheraton La Jolla Hotel for transport to Rady School of Management</td>
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<td>7:30-8:15</td>
<td>Breakfast and networking</td>
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<td>8:15-8:30</td>
<td>Reset the Sails</td>
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<td>8:30-9:30</td>
<td>Leadership in an Employee Ownership Setting</td>
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<td>Jennifer Briggs</td>
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<td>9:30-10:30</td>
<td>Driving Performance through Financial Literacy</td>
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<td>Martin Staubus</td>
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<td>10:30-10:45</td>
<td>Break</td>
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<td>10:45-12:15</td>
<td>Creating a Messaging Plan – A Practicum Workshop</td>
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<td>Jennifer Briggs</td>
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<td>12:15-12:30</td>
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Tab 15