

Employee Ownership Management

UC San Diego Rady School of Management
October 10-13, 2010

Outline

DAY 1 – Monday, October 11

- Understand motivation and how to contribute to and enhance the success of an organization
- Explore 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
- Identify ways that individuals contribute to the short- and long-range goals of the company

DAY 2 – Tuesday, October 12

- Position your company within the competitive marketplace
- Learn techniques to management toward value creation
- Explore the areas of innovation and growth in an employee-owned environment
- Prepare individuals in your company for strategic change
- Go beyond open book management sharing financial information with employees
- Sell the intangible benefits of your company to customers

DAY 3 – Wednesday, October 13

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

Agenda

SUNDAY, OCTOBER 10

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 11

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

8:00-8:45 **Welcome and Introductions**
Anthony Mathews and Sid Scott

8:45-9:15 **Ownership Expectations of Employee Owners**
Sid Scott, *VP of HR, Woodward Communications and Adjunct Instructor, UW Platteville*

9:15-10:15 **Employee Ownership Management Strategies: Who Runs an ESOP Company?**
Anthony Mathews

10:15-10:30 Break

10:30-12:30 **Positioning and Marketing Your Company: Internal and External Customers**
Sid Scott and Heather Honea, *San Diego State University*

12:30-1:30 Lunch

1:30-3:30 **Creating and Delivering the Employee Ownership Message – A Practicum Lab**
John Hoffmire, *Faculty, Puelicher Center for Banking Education, UW Madison School of Business*

3:30-3:45 Break

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

5:15 Dinner and Networking Opportunity
Location: TBA

TUESDAY, 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
- 8:00-8:30 **Learnings from Day One – Reset the Sails**
Sid Scott
Location: UCSD Rady School of Management, Executive Education Auditorium
- 8:30-10:30 **Creating, Leading and Managing the Team**
Del Foit, *Professor, UCSD*
- 10:30-10:45 Break
- 10:45-11:45 **Industry Specific Concerns** – Break Out Session (Four Categories TBA)
John Hoffmire, Sid Scott, Anthony Mathews, Martin Staubus
- 11:45-12:15 **Break Out Session Feedback and Sharing** (Final Session Title TBD)
- 12:15-1:15 Lunch
- 1:15-3:15 **Improving Employee Understanding of Company and Personal Finances**
John Hoffmire and Martin Staubus
- 3:15-4:00 Break - Networking
- 4:00-5:00 **The Future of Employee Ownership Education**
John Hoffmire and Anthony Mathews
- 5:00-5:15 **Day Two Wrap-up and Reflections**
Anthony Mathews
- 5:15 Shuttle pick-up at Rady School of Management for transport to Sheraton La Jolla Hotel

WEDNESDAY, OCTOBER 13

- 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 **Communities of Practice:
Bringing it All Together to Effectively Lead an Employee-Owned Company**
John Hoffmire, Sid Scott and Anthony Mathews
- 9:15 Shuttle pick-up at Otterson Hall for transport to site visit
- 10:00-11:30 **Site Visit: ATA Engineering**
- 11:30-1:00 Lunch (site visit area) / Return shuttle to Sheraton La Jolla Hotel