

Retreat Program

The **Employee Owner Retreat** introduces employee owners to skills, knowledge and peer contacts that will make their participation as owners even more effective.

- **Ownership knowledge** gives employee owners a greater understanding of the mechanics of the ESOP and a greater awareness of the business from the perspective of an owner. All participants attend:
 - ⇒ ABCs of ESOPs & The ESOP Game: For a deeper understanding of how the ESOP really works - great for new employees, ESOP committee members and trainers.
 - And can choose between these two concurrent workshops:
 - ⇒ Understanding Financial Information: The OEOC's classic financial boot-camp for employee owners who want to understand the basic terms and concepts on company financial statements.
 - ⇒ Financial Analysis: The right track for employee owners who are comfortable with the vocabulary on financial statements and who want to analyze what the numbers mean.
- **Team problem solving skills** prepare participants to participate more effectively in meetings, make decisions by consensus, and use a structured process to identify and solve problems.
- **Sharing experiences** with employee owners from across the country is, perhaps, the most important and enjoyable part of the Retreat. Both structured and informal opportunities are available for participants to discuss their successes and challenges.

OEOC Retreat Staff

The Ohio Employee Ownership Center pioneered the Employee Owner Leadership Development Retreat in 1989 for Ohio's Employee Owned Network. In 1993, the Center began running the Retreat for the ESOP Association where it has been run in Boston, Chicago, Phoenix, San Francisco, St. Petersburg, and Cocoa Beach, FL. OEOC staff this year will include:

- ◆ **Chris Cooper, B.A.:** 9 years experience in problem-solving training in employee owned companies and running educational programs for business owners preparing for ownership succession.
- ◆ **Bill McIntyre, MBA, CPA:** 15 years experience as ComSonics CFO, 4 years on the ESOP Association Board of Governors and MidAtlantic Chapter President, and 7 years at the OEOC helping companies establish ESOPs and improve their ownership culture.
- ◆ **Jay Simecek:** 23 years executive management experience including 15 years leading/managing a 100% employee owned company to a change in culture after facilitating a succession plan with the original owner. 4 years as President of the ESOP Association's Ohio Chapter and member of the Executive Committee
- ◆ **Karen Thomas, MPA:** 19 years experience developing and leading leadership development retreats, ESOP training, and front-line leader training.



Class picture from the 2007 Phoenix retreat

Schedule: The Retreats kick off with registration at **9am on Thursday**, and conclude at **1pm on Saturday**. Participants should expect to be involved in activities through 6:30pm Thursday evening. Participants will have free time on Friday night.

Registration: \$525 for first participant; \$415 for additional participants from the same firm (Non-members pay \$725 and \$550). Includes meals and materials. In order to maintain a conducive learning environment, attendance will be limited.

For questions or more information call: The OEOC, Karen Thomas/Bill McIntyre/Chris Cooper/Jay Simecek, 330-672-3028 or the ESOP Association, Rosemary Clements, 202-293-2971.

So How Do I Sign Up?...

Phoenix Jan. 29-31, 2009

Location: Hilton Phoenix East/Mesa, 1011 W. Holmes Ave, Mesa, AZ 85210

Lodging: Please reserve with the hotel **directly**. Call Hilton Phoenix East/Mesa directly at 480-833-5555. Be sure to ask for a room in the ESOP Association room block. Cost is \$149 for a single/double/triple/quad.

Chicago Aug. 13-15, 2009

Location: DoubleTree Guest Suites, 2111 Butterfield Rd., Downers Grove, Illinois 60515

Lodging: Please reserve with the hotel **directly**. Call the DoubleTree at 630-971-2000 to reserve a \$105 room. Be sure to ask for a room in the ESOP Association room block. Rooms can be used as singles or doubles.

Cocoa Beach, FL Feb. 12-14, 2009

Location: Doubletree Oceanfront, 2080 N. Atlantic Avenue, Cocoa Beach, FL 32931

Lodging: Please reserve with the hotel **directly**. Call the DoubleTree Oceanfront directly at 321-783-9222. Be sure to ask for a room in the ESOP Association room block. Cost is \$122 for a single/double.

Cancellation Policy

Cancellations received within seven (7) days of event start date will be subject to a \$125 cancellation fee that covers the cost of non-refundable meals and breaks. Cancellations of sleeping rooms are subject to each hotel's policy and inquiries should be made to the individual establishments directly.

Room Block Information

There are a limited number of hotel rooms available for retreat participants at each hotel. We encourage early registration to ensure a sleeping room at the retreat hotels. Participants can still attend the retreats and stay at a separate hotel.

REGISTRATION FORM

Name(s)	Email	Registration Fee	Special Dietary Needs
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total Amount Due: _____

Retreat: Phoenix Cocoa Beach Chicago

Company: _____

Address: _____

Company Contact Person (for Retreat registrants): _____

Phone: _____ **Fax:** _____

Email: _____

Make check payable to: The Employee Ownership Foundation. Mail to: OEOC/KSU, 113 McGilvrey Hall, Kent, OH 44242
Or fax registration form to the OEOC at 330-672-4063 (Visa/Mastercard payment available; contact The ESOP Association at 202-293-2971)

OEOC

Ohio Employee Ownership Center

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Kent State University
Kent, Ohio 44242



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The Employee Ownership Foundation
An Affiliate of The ESOP Association

2009

Employee Owner Retreats

January 29-31, 2009
Phoenix, AZ

Feb. 12-14, 2009
Cocoa Beach, FL

August 13-15, 2009
Chicago, IL

The *Employee Owner Retreats* are a three-day, off-site training seminar staffed by the Ohio Employee Ownership Center, where *non*-managerial employee owners learn from and interact with their peers from other ESOP companies. In small groups, structured exercises, and informal discussions, employee owners develop new skills and a new perspective on employee ownership at their respective companies.

WHO SHOULD ATTEND?

While any employee owner is welcome, the program is designed primarily to give hourly and salaried **nonmanagerial** employees an opportunity to learn *with* and *from* their peers. Typically, attendees come from outstanding ESOP companies, both service and manufacturing, where developing a culture of ownership is considered an important aspect of corporate success. Participants are often ESOP champions, members of the board of directors, ESOP committees, problem solving teams, or company trainers, and informal nonmanagerial leaders. *Sending 3 to 6 co-employees raises the effectiveness in bringing the learning back.*

Employee Owner Retreat alumni say:

"I shared ideas with and gained valuable knowledge from interacting with a diverse group of fellow employee owners from all types of businesses all over the U.S. about what we are doing to inspire and motivate, which, in turn, makes all of us stronger and better employee owners."

Megan Garvey, Greatland Corporation

"The Employee Owner Retreat was a terrific experience. We both came back 'jazzed' about our ESOP"

Connie Schor, Kindermusik International

"I highly recommend the Employee Owner Retreat. Attendees from our company have raved about the Employee Owner Retreat. One attendee was promoted after attending the Employee Owner Retreat. The enthusiasm he displayed after attending the Retreat was a factor in his being able to be promoted."

Joseph L. Redman, Lewis Tree Service

"It was great. The Retreat helps to educate all of us on the awesome benefits of an ESOP"

Jeff York, A.D. Marble & Co. and
2007 ESOP Association Employee Owner of the Year

The Employee Ownership Foundation

An Affiliate of The ESOP Association



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UPCOMING EMPLOYEE OWNER RETREATS

January 29-31, 2009
Phoenix, AZ

Feb. 12-14, 2009
Cocoa Beach, FL

August 13-15, 2009
Chicago, IL

Where employee owners learn about ESOP communications and the basics of business finance while interacting with and learning from their peers at other ESOP companies

Retreats Staffed by the Ohio Employee Ownership Center

