

Schedule of Events

Day One: Thursday April 16th and Tuesday May 19th

- 9 – 10 **Registration/Refreshments/Meet-n-Greet**
- 10 – 10:30 **Introduction**
- 10:30 – 11 **The Importance of Small Business**
Succession Planning in Your Community
 Statistics
 Job Retention vs. Job Creation
- 11 - 12 **The Basics of Succession Planning**
 Introduction & Basic Concepts
 Owner's Goals, Needs
 Family Issues
 Management Succession
 Time Frame, Start to Completion
- 12 – 1 **Lunch**
- 1 – 3 **Common Issues & Techniques**
 Valuation
 Legal Issues and Documents
 Trusts and Insurance
 Family Transfers
 Sales to Outsiders
 Management Buyouts
- Tax Issues**
- 3 – 3:15 **Break**
- 3:15 – 4:15 **Emergency Situations/Shutdowns**
 Identifying Emergencies Before It's Too Late
 Defining Success and Failure in A Crisis
- Resources**
 Government Resources
 OEOC Resources
- Group Discussion**
 Best Practices
- Dismissal**

Day Two: Friday April 17th and Wednesday May 20th

- Conferences will run from 9 am to 5 pm in Akron and 9 am to 3 pm in Cincinnati and will include breakout sessions on the following topics of interest to Economic Development Professionals:
- Selling to Your Employees Through an Employee Stock Ownership Plan (ESOP)
 - Cooperatives 101: How to sell/buy a company through a worker cooperative
 - Employee Buyouts
 - Government Financing Programs

TENTATIVE AGENDA

- 8:00-9:00 **REGISTRATION & CONTINENTAL BREAKFAST**
- 9:00-9:15 **WELCOME**
- 9:15-10:15 **KEYNOTE ADDRESSES**
- 10:30-12:00 **CONCURRENT PANELS I**
- 12:00-1:15 **LUNCH**
- 1:30-3:00 **CONCURRENT PANELS II**
- 3:00-3:15 **COFFEE BREAK (Akron Only)**
- 3:15-4:45 **CONCURRENT PANELS III (Akron Only)**
- 4:45-6:00 **CLOSING RECEPTION (Akron Only)**

Full day two agenda will be sent out upon receipt of registration

Business Succession Planning

For Economic Development Professionals

What is the most cost effective means of retaining small businesses and the jobs they provide in our communities?

Timely and effective succession planning.

The Ohio Employee Ownership Center (OEOC) at Kent State University, with funding from the Ohio Department of Jobs and Family Services (ODJFS), has put together a 2-day program designed to provide you with the knowledge and tools you need as an economic development professional to help the businesses in your area thrive, and survive the ownership succession process. The program is being conducted twice in 2009. First as part of the OEOC's 23rd Annual Ohio Employee Ownership Conference in Akron, and second at the Southwest Ohio Employee Ownership Conference in Cincinnati.

When Is It?

Thursday, April 16th and Friday April 17th in Akron and Tuesday May 19th and Wednesday May 20th in Cincinnati.

Where is It Located and How Much Does It Cost?

The Akron program is being held at the Akron Fairlawn Hilton, Fairlawn, OH, across from Summit Mall and the Cincinnati program is being held at the Crowne Plaza Cincinnati Blue Ash. Please contact the OEOC at 330-672-3028 for details on sleeping rooms and directions. There is a fee of \$75 for the 2-day program. Registration fee includes lunch on Day one (both locations), breakfast, and lunch on day 2 (both locations).

Who Should Attend?

Local economic development professionals who work for cities, counties, the state, SBDCs, chambers of commerce, utilities, universities, and other economic development organizations.

What is Covered?

Participants will get a grounding in the basics of succession planning to help them communicate the topic from a position of knowledge; an overview of the tools and resources available to help provide the businesses in their area get the help they need; and a discussion of strategies for crisis and shutdown situations. A full agenda can be found on the reverse of this flyer.

How Do I Learn More or Register?

Call Chris Cooper, Jay Simecek or Roy Messing at the OEOC at 330-672-3028 or oeoc@kent.edu with questions. To register, enclose a check or money order made payable to the OEOC for the proper amount with the registration form below to OEOC, 113 McGilvrey Hall, Kent State University, Kent, OH 44242.

Name(s)	_____
Organization	_____
Address	_____
City	_____ State _____ Zip _____
Phone	_____ Fax _____
Email	_____
I would like to register for the _____ Akron _____ Cincinnati program Cost \$75 x _____ = \$ _____	