

SW Employee Ownership OHIO Forum



Dec 8th, 2021

Sinclair Community College, Dayton OH

We're coming back to in-person events with a one-day workshop in Dayton OH to review 2021, and look forward to 2022. The workshop will have sessions on legal and technical issues; a CEO/CFO Roundtable; sessions on HR and communications issues, as well as a mini-workshop session on prepping your communications strategies, and communications committee, for 2022.

Preliminary Agenda (schedule subject to change)

8AM – 8:45AM Registration, Networking, and Breakfast

8:45AM – 9:15AM Morning Welcome

9:30AM – 10:45AM Concurrent Sessions:

1. CEO/CFO Roundtable –

connect with your peers on an open-ended discussion on leadership issues and challenges you are facing in your ESOP company. In order to facilitate an open and honest discussion, attendance is limited to C-Suite leaders of employee-owned companies only.

2. HR Roundtable –

connect with your peers on an open-ended discussion on the HR issues and challenges you are facing in your ESOP company. In order to facilitate an open and honest discussion, attendance is limited to HR professionals of employee-owned companies only.

11AM – 12:15PM Concurrent Sessions:

1. Legal and Administration Year in Review, and Look Forward

With this session, we take a look at recent court cases and administrative rules changes that impact how your ESOP operates – and we'll even get out the crystal ball to discuss what the future may hold.

- David Whaley, Partner, Thompson Hine
- Pete Shuler, Partner, Crowe

2. Communications Strategies and Best Practices

What makes for effective communications in your employee-owned company? One way to think about it is the intersection between strategy and tactics. At this session we will be outlining an overall strategic approach that provides context for developing specific programs, events, and materials for building your communications and culture.

- Jim Bado, President, Workplace Development

12:15PM– 1:15PM Lunch

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1:30PM – 2:45PM Concurrent Sessions:

1. Financial Outlook for 2022, and Impacts (and Update) on Valuations

At this session, we will explore and provide insight into the overall financial picture - where we've been, but most importantly, where we might be headed as turn the calendar to 2022. Then, we will start translating that into the impact on your company, and specifically what's happening with, and impacting ESOP valuations heading into the new year.

- Thomas S. Jalics, Chief Market Strategist, Fifth Third Bank
- Brian Bornino, Director of Valuations, GBQ

2. Strategic Approach to ESOP Sustainability

What helps to make your ESOP sustainable, for the long term? There are a lot of specific tools and techniques – and we'll discuss those – but key is having an approach that helps connect the big picture with the specifics. We'll discuss this and more at this session.

- Tim Jamison, Director, Prairie Capital Advisors
- Peter Jones, Counsel, Tucker Ellis

3. Culture & Communications Mini-Workshop

Join us for an idea exchange, and planning session, for your 2022 communications year. We'll discuss a strategic approach to your types of events, building a calendar for the year, managing your committee or communications staff, and share ideas from among all of us in the room.

- Chris Cooper, Director, Ohio Employee Ownership Center

3:00PM

We are exploring options with the facility for an afternoon reception that fits within the relevant safety protocols.

Cost to Attend:

	Early Bird (ends Nov 26th)	Regular
Members of Ohio's Employee Owned Network (ESOP Companies):	\$95	\$125
General Public	\$150	\$200