

Session Topic Ideas

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This topic idea page is meant to get you started in preparing your proposals to speak at the **2016 Employee Ownership Conference**. We have listed some of the standard topics that are usually included as part of the annual conference each year, plus a few new ideas. You can anticipate lots of competition for all standard topics, and although we need to include them, we also welcome new ideas and encourage you to develop them for breakout sessions. See *"Guidelines for Speaking Proposals"* for further information.

Track 1. ESOP Basics

The audience for this track is generally people with business experience but minimal exposure to ESOPs. It includes senior leadership of companies considering ESOPs or with new ESOPs, new leaders in companies with established ESOPs, and non-managers.

- ESOPs 101
- Overview of an ESOP Transaction
- Determining the Feasibility of an ESOP
- Valuation of Stock for Sale to an ESOP
- ESOPs in Business Succession and Estate Planning
- Fundamentals of ESOP Repurchase Obligation
- ESOP Plan Design
- Basic ESOP Financing
- Basic ESOP Administration Issues
- Getting the Most From Your S Corporation ESOP
- Basic ESOP Distribution Rules

Track 2. ESOPs: Beyond the Basics

The audience for this track is experienced senior leaders in ESOP companies, trustees, and service providers.

- Overhauling Your ESOP: Dealing with Changes in Business Conditions
- Workshop for Internal Trustees
- ESOP Distribution Rules
- Planning for and Funding the Repurchase Obligation
- ESOPs in Mergers and Acquisitions
- Administrative Mistakes and How to Fix Them
- Sustaining an ESOP in Mid-Life and Beyond
- ESOP Administrative & Disclosure Responsibilities: Who Must Do What, When
- Forming an ESOP Committee: Fiduciary vs. Administrative Roles
- Trends in Litigation/Legal Updates
- Finance: Capital Market ESOP Transactions
- Diversification: Rules and Current Trends
- Accounting for ESOPs

Track 3. Compensation and Benefits

The audience for this track are senior leaders in ESOP and non ESOP companies concerned with compensation and benefit issues and could also include human resource professionals.

- Key Executive Compensation Issues in ESOP Companies
- Effective Boards of Directors: Obligations, Compensation, and Recruitment
- Broad based Incentive Plans in ESOPs and Non-ESOP Companies
- Planning Compensation and Benefits in an Employee-Owned Company
- Forms of Equity Compensation for ESOPs and Non-ESOP Companies
- Multi-National ESOP Companies: How Do We Include All?

Track 4. Communications and Ownership Culture

The audience for this track comes from all types of employee-owned companies, and includes senior leaders, human resource professionals, non-managers, and members of employee committees.

- Case Studies: Communicating in Employee-Owned Companies
- Plan Communication Basics
- Introduction to Business Literacy and Open Book Management
- Short-Term Incentives to Support Your Ownership Culture
- Effective ESOP Committees
- Techniques for Creating a Culture of Owners
- Tips and Ideas on Motivating Employee Owners
- Teamwork in an ESOP
- Integrating Shared Ownership Into Your Existing Culture Strategy

Track 5. Leadership and Governance Issues

The audience for this track is leadership broadly conceived, including directors, executives, middle managers, and service providers.

- Building Your Top Management Team
- Sustaining Your ESOP Company Over the Long Term
- Selecting and Training ESOP Company Board Members
- The Life of Your ESOP: Decisions You Need to Think About
- Strategic Planning: Pros and Cons
- Management Succession in an Employee Owned Company
- Selecting and Training Inside ESOP Trustees
- Personnel Issues in an Employee-Owned Company: Hiring, Performance Reviews, Firing