

2009 Employee Ownership Conference
NCEO & Beyster Institute
Portland, Oregon April 22-24, 2009

SESSION TOPIC IDEAS

This document is meant to help you get started thinking about sessions to propose for the 2009 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. So in addition to considering these for your proposals, we encourage you to develop your own timely and creative ideas for breakout sessions. We need the standard topics but we welcome your new proposal ideas!!

The conference tracks include:

- ESOP Basics
- ESOPs: Beyond the Basics (includes 4 or 5 in the sub-category of highly technical issues for the very advanced)
- Equity Compensation Plans
- Communication and Ownership Culture
- Management Track: New Ideas & Best Practices

ESOP Basics

In addition to considering these for your proposals, we encourage you to develop your own timely and creative ideas for break out sessions.

- Determining the Feasibility of an ESOP
- Valuation of Stock for Sale to an ESOP
- ESOPs in Business Succession and Estate Planning
- Corporate Governance in an ESOP Company
- ESOP Plan Design
- ESOP Financing
- Accounting for ESOPs

ESOPs Beyond the Basics

In addition to considering these for your proposals, we encourage you to develop your own timely and creative ideas for break out sessions.

- Workshop for Internal Trustees
- ESOP Distribution Rules
- Planning for and Funding the Repurchase Obligation
- ESOPs in Mergers and Acquisitions
- S Corporation Issues for ESOP Companies
- Sustaining an ESOP in Mid-Life and Beyond
- The Mature ESOP: Looking Ahead
- 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
- Critical Issues for ESOP Company Boards

Equity Compensation Plans, Including Stock Options

In addition to considering these for your proposals, we encourage you to develop your own timely and creative ideas for break out sessions.

- Equity Vehicles Other Than ESOPs
- Equity-Linked Compensation: Stock Appreciation Rights, Phantom Stock, and Other Approaches
- Critical Administrative Procedures for Private Company Stock
- Accounting for Equity Compensation Plans in a Private Company
- Communicating Equity Compensation
- Who Gets What?: Who Should Get How Much and in What Form?
- 409A: Deferred Compensation
- Equity Compensation as a Competitive Advantage—Designing for Recruiting, and Engaging Employees
- Is an ESOP enough? Using Equity Compensation in an ESOP Company

Communications and Ownership Culture

In addition to considering these for your proposals, we encourage you to develop your own timely and creative ideas for break out sessions.

- Case Studies: Communicating in Employee-Owned Companies
- Communicating Your Equity Compensation Plan
- Introduction to 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
- Minimizing Cynicism, Building Trust

Management Track: New Ideas and Best Practices

In addition to considering these for your proposals, we encourage you to develop your own timely and creative ideas for break out sessions.

- Building and Compensating Your Top Management Team
- How Employee Ownership Changes Board Dynamics and Structure
- Global Trends in Leadership
- Lean Manufacturing and Employee Owned Companies
- Ownership Plans in Emerging Technology Companies
- Social Responsibility, Employee Ownership, and Employee Motivation: A Win-Win or Extra Cost?
- Strategic Planning for Effective Organizations
- Weathering the Storm: Managing Employee-Ownership Companies in a Weak Economy