

CHAPTER CONFERENCE PROGRAM OF EVENTS

September 27-29, 2017
Sheraton Portland Airport Hotel
8235 NE Airport Way
Portland, Oregon



The ESOP Association is the national trade association for companies with employee stock ownership plans (ESOPs) and the leading voice in America for employee ownership. The core cause of The ESOP Association is the belief that employee ownership will improve American competitiveness, increase productivity through greater employee participation, and strengthen our free enterprise economy.

About the Conference Sessions: The Chapter is offering general sessions and breakout sessions throughout the conference so employee owners of all experience levels gain from the information provided. Whether you are brand new to ESOPs or experienced with ESOPs, you will gain knowledge from attending the 2017 Chapter Conference.

About the Communications Fair: The Communications Fair is an opportunity for companies to share their company communications materials – brochures, story boards, intranet, websites – Your company can participate and have a table to show your materials or you can enjoy visiting with those who have a display and learn more about communicating your ESOP to your employee-owners. The displays will be up throughout the conference but company representatives only need to staff the tables during the welcome reception.

Wednesday, September 27

5:30 p.m. – 7:30 p.m. **REGISTRATION DESK OPEN, WELCOME RECEPTION & COMMUNICATIONS FAIR**

Thursday, September 28

7:30 a.m. – 9:00 a.m. **REGISTRATION, BUFFET BREAKFAST & COMMUNICATIONS FAIR**

9:00 a.m. – 10:00 a.m. **WELCOME, OPENING REMARKS & KEYNOTE ADDRESS:**
All the Latest about The ESOP Association, the Politics in Washington DC and Round Robin Discussion with the President of The ESOP Association
J. Michael Keeling, President, The ESOP Association

10:00 a.m. – 10:30 a.m. **BREAK & COMMUNICATIONS FAIR**

10:30 a.m. – Noon

BREAKOUT SESSIONS

CULTURE:

Strategic Planning

Speakers:

Donny Springer, Principal, Columbia Financial Advisors, Inc.
(Portland, Oregon)

TECHNICAL:

Tough Decisions: Making Internal Changes that Affect Everyone

Speakers:

Janece Higgins, Chief Executive Officer, Alaska Rubber Group
(Anchorage, Alaska)
Kim Blaugher, CPA, Vice President-Consulting, Principal Financial
Group (Boise, Idaho)

Noon – 1:30 p.m.

LUNCHEON, CHAPTER AWARDS PRESENTATION & KEYNOTE ADDRESS

Mark Lomele, Chief Financial Officer, Recology (San Francisco, California)

1:30 p.m. – 3:00 p.m.

BREAKOUT SESSIONS

CULTURE:

It's all About ESOP Culture

Speakers:

Katrina Haney, Human Resource Manager, DKS Associates
(Portland, Oregon)
Victor Enriquez, Group Human Resources Manager – Pacific
Northwest, Recology (Portland, Oregon)

TECHNICAL:

Legal and Regulatory Update: It's not a glamorous topic, even if you put lipstick on it, but it's all latest information you need to know

Speakers:

Lynn Archer, Attorney, Lathrop Gage LLP (Portland, Oregon)
Lara Hemingway, Foster Pepper (Spokane, Washington)
PJ Carstens, Foster Pepper (Spokane, Washington)

3:00 p.m. – 7:30 p.m.

OFFSITE EVENT: BOB'S RED MILL

A highlight of this year's conference is the opportunity to visit an employee-owned company – Bob's Red Mill.

The attendees will be transported to Bob's Red Mill where they will enjoy a tour of the mill, a Keynote Address by Bob Moore, Founder of Bob's Red Mill, and a reception at the Mill Store.

4:00 p.m.

Tour of Bob's Red Mill

4:45 p.m.

Keynote Address: Bob Moore, Bob's Red Mill

5:30 p.m.

Transport to the Red Mill Store – a mile from the mill – for private shopping and reception

Guests will be transported back to the hotel at approximately 7:30 p.m.

Friday, September 29

7:30 a.m. – 8:30 a.m. **BUFFET BREAKFAST**

8:30 a.m. – 9:30 a.m. **ROUNDTABLE DISCUSSIONS**

Roundtables will have a moderator for each topic. Registrants may attend one roundtable or move around throughout the area. Learn from each other, share ideas, and get answers to some of your most important questions.

9:30 a.m. - 10:00 a.m. **NETWORKING BREAK**

10:00 a.m. – 11:30 a.m. **BREAKOUT SESSIONS**

CULTURE: Engaging Millennials Through an ESOP

This exciting session not only focuses on how to engage millennials, but also how to engage your entire workforce through the unique nontraditional benefit an ESOP provides. The presenters will provide you with seven key things that all millennials are looking for in their employer along with the four key emotions that cause employees to become engaged at work. The session will also provide you with several “best practices” to improve retain rates and potentially attract more qualified applicants.

Speakers:

Jason Wellman, Senior ESOP Relationship Consultant, ESOP Partners

Dan Marcue, Chapter Development Officer, The ESOP Association

TECHNICAL: Capital Markets Update: What is Happening in the Public and Private Marketplace and What that Means to ESOP Companies

Speaker:

Nicholas Braun, Vice President, Chartwell

11:30 a.m. **CONFERENCE CONCLUDES**