



**Center for Cooperatives**  
UNIVERSITY OF WISCONSIN-MADISON

## **Business Succession and Retention: Employee Ownership Solutions**

Thursday, April 20, 2017 from 9:00 a.m. – 3:00 p.m.

Location: Landmark Services Cooperative, 1401 Landmark Drive, Cottage Grove, WI 53527

### DRAFT AGENDA

#### **8:15 a.m. – 9:00 a.m. Breakfast and Registration**

#### **9:00 a.m. – 9:30 a.m. Welcome & Setting the Stage**

*Anne Reynolds, Executive Director, UW Center for Cooperatives*

#### **9:30 a.m. – 10:30 a.m. What are ESOPs & Co-ops? Clarifying the Models and Dispelling Myths About Employee Ownership**

This session will explore the benefits of employee ownership, will give attendees a better understanding of the different types of employee-owned businesses and their ability to revitalize economies.

*Courtney Berner, Cooperative Development Specialist, UW Center for Cooperatives*

#### **10:30 a.m. – 10:45 a.m. Break**

#### **10:45 a.m. – 12:00 p.m. Becoming Employee Owned: Key Steps in the Conversion Process and Resources to Ease the Way**

This session will break down the conversion timeline and explain the key steps for undergoing a successful conversion. Presenters will also give an overview of the available resources that can help with the transition process.

*Paul Karch, Partner, Husch Blackwell LLP*

*Margaret Lund, Principal, Co-Opera Co.*

#### **12:00 p.m. – 1:00 p.m. Lunch & Networking**

#### **1:00 p.m. – 1:45 p.m. Strategies for Capitalizing Conversion Deals**

This session will provide different strategies for capitalizing a conversion deal, including outside financing and staged buyout when most workers don't have the resources to pay for a business in cash.

*Mark Fick, Director of Lending, Shared Capital Cooperative*

#### **1:45 p.m. – 2:30 p.m. Conversion in Action: Stories of Real Employee-Owned Business Transitions**

During this session, participants will hear directly from employees about the conversion of their business to employee ownership and how that change has affected their company's structure, culture, and bottom line.

*Dirk Maroske, President & CEO, Aztalan Engineering, Inc.*

*Karl Cumblad, Chief Operating Officer, Diversified Insurance Solutions*

**OPTIONAL:** 2:45 p.m. – 3:45 p.m. One-on-one consultations with professionals who have supported employee ownership conversions. Pre-registration required.