



The Minnesota/Dakotas Chapter

Thursday, February 14, 2019

Doubletree Hotel
7800 Normandale Blvd., Bloomington, MN

PROGRAM AGENDA

7:30 – 9:30 HR Roundtable – Atrium 1
 CFO Roundtable – *Atrium 2*
 CEO Roundtable – Atrium 3

8:30 – 10:00 Registration for Chapter meeting – Plaza 6 Mall

9:00 – 9:45 **NEW!** ESOP Committee Roundtables – Intended for all employee owners. Bring your questions, struggles and ideas to be discussed with fellow Communication Committee members - Moderator: Missy Pieske, Walman – Plaza 5- 6

General Session – Plaza 5 and 6

10:00 – 10:30 **Company Profile – Haldeman Homme Inc., Minneapolis, MN**

Haldeman Homme, Inc. partners with clients, designers, and builders combining design, products, systems, and services that deliver a total facility solution to meet our clients' specific requirements and vision.

Our clientele includes contractors, architects, health care facilities, colleges and universities. We provide design, sales and service of laboratory equipment, classroom and science casework, athletic flooring, athletic equipment, seating, lockers, millwork, material handling and storage equipment, filing systems and software, and technology education equipment and curriculum.

Ron Johnson



Ron has been with HHI for 23 years. Ron was elected to be HHI President in 2015 by the HHI board of directors. Ron is also an ESOP trustee.



Nicole Federer

Nicole has been with HHI for 12 years and is currently the Human Resources and Safety Manager. Nicole is on the leadership team and has helped develop many of the employee owner focused programs and initiatives.



Danette Childs

Danette has been with HHI for 2 year as our Marketing Manager. Danette and her team are responsible for internal and external branding and communication. Danette is active in the employee owner focused committees and is on the leadership team.

10:30 – 11:30 Beyond the Paycheck...Winning the Talent War

Most leaders are looking at the current talent market and wondering how they are going to retain and recruit the best people to grow their business and achieve their goals. In a tight labor market, the best companies need to focus on unique things that set them apart and really drive engagement and high performance. In this keynote/workshop, we will talk about the following topics:

- How to retain your top talent that you have today and drive higher performance in a tight labor market
- Key aspects of your business that might be driving lower engagement and retention – things you don't even realize
- Creating a talent retention and recruitment roadmap that is aligned to your growth strategy
- The Talent war – what does the top talent in your industry actually want? Creative (and inexpensive) ways to increase retention, engagement, and performance in your workforce.
- The myth – you don't need everyone to be on the “A” team, how to drive higher performance in even your middle of the road employees – and the impact it can have on your bottom line.

This topic will help you get Beyond the Paycheck with your employees and drive a healthy culture.



Jaime Taets spent 13 years in a large corporate environment in a variety of leadership roles. She is currently the CEO of Keystone Group International, a firm focused on leadership development and organizational strategy and growth. She has lived and traveled globally and strongly believes that strong leadership is the foundation for healthy and sustainable growth for any business. Jaime uses her leadership experiences to drive “real” discussions about how we can all utilize our strengths and values to lead others – both within and outside of the office.

11:30 – 12:15 Chapter Business

12:30 – 1:15 Lunch – Garden Court

1:30 – 2:30 Technical - Valuation Checklist for the ESOP Company – Plaza 5

This presentation outlines 15 items that should be considered by the Company management, ESOP Trustee and valuation firm when performing an ESOP valuation. How can each of the items impact the valuation conclusion, Company or ESOP participants.

Speakers: Shaun McGehee and Macie Dorow, Prairie Capital Advisors

1:30 – 2:30 Communication – Interviewing when you have an ESOP – Plaza 6

Join this interactive session to learn about team interviewing, behavior-based questions, and to hear how other ESOP companies are conducting their interviews. This is a workshop format so bring your pen and paper and be ready to participate!

Speakers: *Dan Marcue, The ESOP Association; Chelsey Paulson, North Country Business Products; Nicole Hoverson, Oxygen Service; Megan Clyne, Hunt Electric*

2:30 – 2:45 Break

2:45 – 3:45 *Technical* – New and Notable ESOP Valuation Issues - Plaza 5

Valuation methodology and theory continue to evolve. Judicial opinions, DOL Process Agreements, academic studies, and thoughtful debate all contribute to a constantly evolving body of knowledge and portfolio of “best practices.” This valuation session will present and discuss recent valuation-related developments and other “hot topics” relevant to ESOP valuation.

Matt Schubring, Chartwell

2:45 – 3:45 *Communication* –Fanning the Creative Spirit – Plaza 6

This session will explore the idea of creativity, present tools that you can use and practice using the tools to generate new ideas to enhance your ownership culture and ESOP.

Victor Aspengren, Prairie Capital Advisors

3:45 – 5:30 Reception – complimentary refreshments – Plaza Mall

Plan to stay and continue the conversation with your ESOP colleagues.

Hotel Room Booking Link: <http://doubletree.hilton.com/en/dt/groups/personalized/M/MSPBSDT-SOP-20190213/index.jhtml>

Single or Double rate: \$109 Cut off date: January 30, 2019