

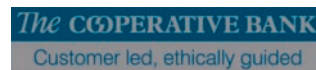
A MAJOR 1 DAY CONFERENCE

EMPLOYEE ENGAGEMENT: DRIVING BUSINESS SUCCESS

THURSDAY 1 DECEMBER 2005 | HYATT REGENCY, BIRMINGHAM UK

- Employee buyouts – an effective solution to business succession
- Using employee engagement to transform the enterprise
- Employee ownership as a driver for growth and sustainability

EMPLOYEE OWNERSHIP AND PARTICIPATION IN
HIGH PERFORMANCE 21ST CENTURY BUSINESS



THIS CONFERENCE HAS BEEN DEVELOPED UNDER THE AUSPICES OF THE UK CO-OPERATIVE FORUM

EMPLOYEE ENGAGEMENT: DRIVING BUSINESS SUCCESS

EMPLOYEE OWNERSHIP AND PARTICIPATION IN HIGH PERFORMANCE 21ST CENTURY BUSINESS

- Learn why employee buyouts can be an effective solution to business succession
- Find out how 'engaged' employees can transform businesses
- Understand why employee ownership is taking off.

Governments across the EU are taking an increasing interest in employee buyouts as a realistic option for business succession. At this unique conference you can explore the potential for transferring ownership to the workforce, understand the benefits, and learn about the practical steps to take by those dealing with the issue of succession to secure a future for their business.

Businesses that develop a high level of engagement with, or are owned by, their employees deliver good performance, create sustainable employment and enjoy staff loyalty and commitment that is the envy of their competitors.

So what's the secret? This conference will give you the inside track on why these businesses work so well, the management techniques they use, and how other businesses can learn from what they do.

Additionally, new research on breaking down the barriers to employee ownership will be launched.

WHO SHOULD ATTEND?

- Trade association and business federation executives
- Proprietors of SMEs considering succession, and their business advisors
- Enterprise development specialists in Business Links, RDAs, and government at all levels
- Management consultants
- Owner/managers in worker co-operatives and employee owned businesses
- Trade unionists
- Academics and researchers
- Social entrepreneurs

CONFERENCE PROGRAMME

9.30–10.15 REGISTRATION AND COFFEE

10.15–11.45 OPENING PLENARY

Dame Pauline Green, chief executive Co-operatives^{UK}
Conference chair

Phil Mercer, chair of the DTI Business Transfer Steering Group
The challenge of business succession

TELLING IT AS IT IS: TWO SHORT CASE STUDIES:

- **John Clough MBE, chief executive, Eaga Partnership**
- **Paul Williams, Datrys Engineering Consulting Ltd**

Jonathan Michie, director of Birmingham University Business School
The evidence for employee ownership

11.45–1.00 SEMINAR SESSION 1

STRAND A EMPLOYEE BUYOUTS AS A SOLUTION TO BUSINESS SUCCESSION

SOLVING THE PROBLEM OF BUSINESS SUCCESSION

Helen Seymour, Co-operatives^{UK}
Chair

Phil Mercer, chair of the DTI Business Transfer Steering Group
The Government's research and approach

Norman Watson, Wales Co-operative Centre
Why the employee ownership option?

Andy Lane, Loch Fyne Oysters
Why sell to the workforce?

STRAND B MAKING EMPLOYEE ENGAGEMENT WORK

MANAGEMENT AND LEADERSHIP IN THE DEMOCRATIC ENTERPRISE
WHAT MAKES IT WORK WELL? EXPERIENCE FROM THE BRIDGE

Ann Tyler, company secretary, JOL and director of Job Ownership Research
Chair

John Clough MBE, Eaga Partnership Ltd

Paul Williams, Datrys Engineering

Jenny Stein, Suma

STRAND C SUSTAINING AND GROWING THE ENTERPRISE

FINANCING THE FUTURE: RAISING FINANCE AND KEEPING THE DEMOCRACY –
STRUCTURES, PROCESSES AND MECHANISMS

Andrew Hibbert, Co-operative and Community Finance
Chair

David Erdal, Baxi Partnership
Financing employee ownership

David Daws, Ingram Winter Green
Employee Benefit Trusts

Unicorn Grocery
Raising money from your stakeholders

13.00 –14.00 LUNCH

13.45 –14.00 THE LAUNCH OF THE TENDER TRAP

Why the employees’ bid to run the Dartford Crossing failed – an investigative report by Anthony Jensen (published by JOL and funded by Co-operative Action).

14.00–15.15 SEMINAR SESSION 2

STRAND A EMPLOYEE BUYOUTS AS A SOLUTION TO BUSINESS SUCCESSION

HOW IT CAN BE DONE

Simon Harris, CEO Wales Co-operative Centre
Chair

Carole Leslie, Learning IT
We did it!

Malcolm Lynch, Wrigleys Solicitors
Making it happen: money and structures

Gareth Nash, CMS
Processes – A business advisor’s view

STRAND B MAKING EMPLOYEE ENGAGEMENT WORK

ENGAGEMENT AND PARTICIPATION IN THE DEMOCRATIC ENTERPRISE

Rainer Schlüter, CEO Co-operatives in Europe
Chair

Speaker from EROSKI, Mondragon, Spain

Adrian Britten, Head of Colleague Engagement, The Co-operative Group

Jim Brown, Baker Brown Associates

STRAND C SUSTAINING AND GROWING THE ENTERPRISE

SKILL NEEDS AND LEARNING IN THE DEMOCRATIC ENTERPRISE

Chris Cooper, director of Learning and Development, the Co-operative College
Chair

Mark Sesnan, Greenwich Leisure Limited

Marian Borde, director, Lime Scotland Ltd

Kate Whittle, Co-operative Business Consultants

ADDITIONAL OPTION

Anthony Jensen
Procurement – lessons to be learned from the Dartford River Crossing experience

15.15–15.30 TEA

15.30–16.30 CLOSING PLENARY: THE WAY FORWARD AND CHALLENGES AHEAD

Rainer Schlüter, Co-operatives in Europe/CECOP
The European perspective – what can we learn? Are they ahead of the game?

Les Bayliss, assistant general secretary, Amicus
Trade Unions and Employee Engagement

Patrick Burns, JOL
Breaking the Barriers: Obstacles to employee ownership and how they can be surmounted – new research findings.

16.30 CONFERENCE CLOSE

THE SPEAKERS

LES BAYLISS

Les Bayliss is assistant general secretary of Amicus, the largest public and private sector union. Les has forty years experience in the trade union and labour movements and for the past 20 has taken a particular interest in co-operatives and employee ownership.

www.amicustheunion.org

MARIAN BORDE

Marian Borde is a business psychologist. She comes from a background as a strategic consultant with The Industrial Society (now The Work Foundation) where she worked for five years. Marion has a twenty year track record of leading and implementing change, for individuals, teams and organisations. Marion, along with her business partner, is currently working with Loch Fyne Oysters Ltd.

www.limescotland.com

ADRIAN BRITTEN

Adrian Britten is Head of Colleague Engagement at the Co-operative Group. Adrian's role involves driving the internal re-branding process within the Co-operative Group while creating the conditions necessary to improve levels of engagement amongst some 58,000 colleagues. His career includes senior positions in international marketing, PR, political and internal communications with leading companies such as Nokia and Unilever. Having worked across North America, Asia and Europe, Adrian has experience of diverse market sectors including packaged consumer goods, telecoms, manufacturing, retail and financial services. As a Chartered Psychologist, he draws heavily on his original training to create the kind of measurable and sustainable change that makes businesses truly successful. www.co-operativegroup.coop

JIM BROWN

Jim Brown is the principal consultant with Baker Brown Associates – a co-operative business specialising in research and development of co-operatives, the social economy and lifelong learning. Jim is the editor and principal author of the groundbreaking book *Co-operative Capital*, and is currently a senior technical expert to a European Union funded co-operative development project in South Africa. www.bakerbrown.co.uk

PATRICK BURNS

Patrick Burns is executive director of JOL, the association of employee owned businesses. He was previously policy director for The Work Foundation and is a former senior economic adviser with the TUC. www.jol.org.uk

JOHN CLOUGH MBE

John Clough MBE is chief executive of Eaga Partnership, an employee owned social enterprise, ranked 28th best company to work for in the 2004 "Sunday Times Best 100 Companies to Work For". As an outsource partner and programme manager for central and local government, utilities and housing providers, Eaga has assisted over 5 million vulnerable households throughout the UK since 1991. www.eaga.co.uk

CHRIS COOPER

Chris Cooper is Vice-Principal and Director of Learning and Development at the Co-operative College and is responsible for the College's programmes across the co-operative, mutual and social enterprise sectors both in the United Kingdom and internationally. www.co-op.ac.uk

DAVID DAWS

David Daws is a solicitor with the firm of Ingram, Winter, Green. He has twenty years experience in the establishment and operation of employee share schemes. David has extensive experience in the privatisation of businesses from the public sector as well as employee buy-outs in the private sector. He specialises in designing and implementing the succession of SMEs from existing proprietors to the employees. www.iwg.co.uk

DAVID ERDAL

David Erdal is MD of the Baxi Partnership Limited, an investment company owned by The Baxi Partnership Trust. The trust's purpose is to support employee buyouts, with three key elements: commercial success, employee ownership and a strong partnership culture. www.baxipartnership.co.uk

EROSKI

Eroski is a leading retailing business and part of the huge Mondragon Co-operative Corporation headquartered in Spain's Basque country. www.eroski.es

SIMON HARRIS

Simon Harris has been with the Wales Co-operative Centre since January 1992 and its Chief Executive since March last year. The Centre provides business support and training services to both new and existing co-operatives throughout Wales and is the largest co-operative development agency in the UK. www.walescoop.com

ANDREW HIBBERT

Andrew Hibbert is the Development Manager of Co-operative and Community Finance (ICOF), the leading lender to co-operatives and social enterprises for over 30 years, and a provider of loan fund management services for other lenders for nearly 15 years. Andrew was previously founder and general manager of Daily Bread Co-operative in Cambridge, a highly successful business employing people with mental illness. www.icof.co.uk

ANTHONY JENSEN

Anthony Jensen has been a researcher, consultant and lobbyist for employee owned businesses for the last 20 years in the UK and Australia. He has a Master of Economics degree focussing on the dynamics of the employee buyout and the reasons for their success or failure. He is currently specialising in insolvency and employee buyouts and leads a research project funded by Co-operative Action to study the Spanish experience and its application to the UK.

ANDREW LANE

Andrew Lane is managing director of Loch Fyne Oysters Ltd and led the transfer of Loch Fyne Oysters' ownership to its employees in 2003. www.lochfyne.com

CAROLE LESLIE

Carole Leslie is director of Learning IT, which was founded in 1997 and specialises in offering high level technical training to IT professionals. The company is also involved in recruitment, IT services and consultancy. The company was owner managed until May 2003 when Baxi Partnership funded an employee buy-out. www.learningit.com

MALCOLM LYNCH

Malcolm Lynch has over 20 years involvement with employee owned businesses. He is a partner at Wrigleys, a leading private client firm of solicitors. He advises on employee ownership as a business succession strategy for private owners including how owners can move towards employee ownership through the development of employee benefit trusts and share incentive plans. www.wrigleys.co.uk

PHIL MERCER

Phil Mercer chairs the Business Transfer Steering Group on behalf of the Government/DTI. The Group comprises representatives from government, professional bodies and specialists, and has the remit to implement the recommendations of the report "Passing the Baton – encouraging successful business transfers" produced in November 2004.

JONATHAN MICHIE

Jonathan Michie is Professor of Management at the University of Birmingham where he is the Director & Head of Birmingham Business School. He previously held the Sainsbury Chair of Management at Birkbeck, University of London, where he was Head of the School of Management & Organizational Psychology, and before that was at the Judge Business School, University of Cambridge. <http://business.bham.ac.uk>

GARETH NASH

Gareth Nash has 18 years experience of co-operative, social enterprise development and financing. He was part of a team advising Universal Bulk Handling (International) Ltd, an employee buyout of 90 staff. He managed the EU funded "Enterprising Services" project on co-operative options for Public Sector services. Gareth is a board member of Co-operativesUK. www.cms.coop

RAINER SCHLÜTER

Rainer Schlüter is the Director of the Cooperatives Europe lobby group, and the ICA's (International Co-operative Alliance) Director for the European region. For the last 20 years he has been General Secretary of CECOP (the European Confederation of Workers Co-operatives, Social Co-operatives and Social and Participative Enterprises). Rainer also has extensive experience of working in employee owned businesses.

MARK SESNAN

Mark is the Chief Executive of Greenwich Leisure Limited (GLL), the pioneering staff-owned social enterprise that took over the operation of Greenwich Council's leisure centres in 1993. The GLL 'model' has since been replicated by 100 local authorities throughout the United Kingdom. GLL itself now operates around 50 leisure centres across London, has a turnover of over £45m and employs more than 2,000 people. One of the secrets of its success is the effort it invests in training for staff and structures to enable them to be involved in the democratic ethos of the business. www.gll.org

JENNY STEIN

Jenny Stein has been a Suma member for nine years. Suma is a flourishing 70 member worker co-operative based in Yorkshire. It is the largest equal pay employer in Europe. www.suma.coop

ANN TYLER

Ann Tyler is a solicitor with more than twenty years' experience in the field of employee ownership. She advised on the first UK ESOP, was a founder shareholder and director of Capital Strategies, and has worked for Unity Trust Bank and The Work Foundation. She has always been particularly interested in schemes to introduce all-employee ownership and democratic participation.

NORMAN WATSON

Norman Watson is a Business Succession Advisor at the Wales Co-operative Centre. Since 1989 Norman has specialised in arranging employee buyouts. The companies assisted have a total turnover of over £62m and over 1150 jobs have been safeguarded or created. www.walescoop.com

KATE WHITTLE

Kate Whittle is a founder member of Cooperative Business Consultants, established in 2003 to promote democratic ownership structures and management methods within the social enterprise sector. Kate focuses on 'people skills', which she sees as the critical bedrock of any successful co-operative business. www.cbc.coop

PAUL WILLIAMS

Paul Williams is a chartered civil engineer, and the Managing Director of Datrys Consulting Limited. He led the buy-out of the business with the active support of the Wales Co-operative Centre and Co-operative and Community Finance (ICOF). www.datrysconsulting.com

BOOKING FORM

To ensure your place at this conference please complete this booking form and return it to Co-operatives^{UK} at the address below. If you have any queries please do not hesitate to contact us on 0161 246 2900. If you wish to book multiple places for the event copy this form, download further copies from www.cooperatives-uk.coop, or contact us for additional copies.

YOUR NAME _____

JOB TITLE _____ **ORGANISATION** _____

ADDRESS _____

TELEPHONE _____ **FAX** _____

EMAIL ADDRESS _____

PAYMENT

The fees to attend the conference are:

For members* of Co-operatives^{UK} or JOL:

Smaller organisations (under £30M turnover) £125 (£146.87 inc.VAT)

Larger organisations (turnover £30M and above) £195 (£229.12 inc.VAT)

All others £225 (£264.37 inc.VAT)

This includes your conference pack, refreshments and a hot buffet lunch.

* For details of membership, please contact Co-operatives^{UK} on 0161 246 2920, or JOL on 020 7821 9298

PAYMENT METHOD

BACS/CHAPS (please give 'Dec 1 Conference' as a reference). Sort code: 08-90-00 Account: 53030043

I enclose a cheque, made payable to Co-operatives^{UK} Limited:

Please invoice me at the above address so that I can get payment authorised.

Note: Delegates will not be admitted to the conference if payment has not been received in full prior to the day of the event.

SPECIAL NEEDS

Please let us know of any special needs (including dietary requirements, access, mobility, etc.) so that we can ensure an enjoyable and problem-free day for you:

Send your completed booking form with your payment to Co-operatives^{UK}, Employee Engagement Conference, Holyoake House, Hanover Street, Manchester M60 0AS. For further information check the website at www.cooperatives-uk.coop or contact Graham Mitchell (graham.mitchell@cooperatives-uk.coop, 0161 246 2953)

CONDITIONS OF BOOKING

By completing and returning this booking form you accept the following conditions of booking: No cancellations can be accepted once a booking has been received. However we are happy to accept substitutes for booked places if you find you are unable to attend. Please let us know in writing as soon as possible. We reserve the right to cancel the event at any point, and cannot be held liable for any costs incurred by delegates. The event programme may be subject to change.

ABOUT THE SPONSORS

CO-OPERATIVES^{UK}

Co-operatives^{UK} is the national member-owned and led organisation that promotes co-operative solutions, works to increase awareness and understanding of co-operative values and principles, and supports the development and growth of new and existing co-operatives. It is a focal point for the sector, a forum for innovation and best practice, and a strategic voice for the co-operative movement.

www.cooperatives-uk.coop

WALES CO-OPERATIVE CENTRE

The Wales Co-operative Centre provides business advice and training services to anyone wishing to establish a co-operatively structured business within Wales.

www.walescoop.com

JOL

JOL is the association of employee owned businesses formed in 1979 as Job Ownership Limited. Its members include the John Lewis Partnership, other long established co-owned companies like Scott Bader and Swann-Morton, and a range of other employee owned businesses from a wide range of sectors.

www.jol.org.uk

THE CO-OPERATIVE BANK

The Co-operative Bank is supporting the conference financially. The Co-operative Bank, which is banker to many small business customers, understands the importance of Employee engagement. Indeed, the Bank believes that employee ownership can in many cases be the answer to one of the biggest issues facing small business owners – succession planning.

www.co-operativebank.co.uk