

Rutgers University School of Management and Labor Relations

Foundation for Enterprise Development

Employee Ownership Foundation

The Beyster Symposium

June 25-28, 2017

Purpose

The purpose of the annual symposium is to study broad-based forms of financial participation in capital ownership and capital income, such as broad-based employee stock ownership, equity compensation, profit sharing/gain sharing, worker cooperatives in the corporation, and broad-based capital shares in the United States, from an interdisciplinary perspective. The workshop provides an opportunity for senior and emerging scholars, legal, and policy experts to present research and receive mutual mentoring and feedback. The meeting convenes more than 130 Fellows of the Fellowship Program on Employee Ownership and Profit Sharing of the School of Management and Labor Relations (SMLR) at Rutgers University. The Fellows are investigating these issues at more than forty universities, colleges, and research centers nationwide in more than thirty states.

Theme: *Empirical Research on Employee Ownership and Modest Income Employees*

Copies of empirical papers, powerpoints, resource material, the updated program, and other related announcements are available on Dropbox:

<https://www.dropbox.com/sh/mxedw0anu6sycer/AAD7VE6pCPs5xXKNBZHWq28Za?dl=0>

Locations:

All locations are within 1-3 blocks of each other:

The official conference hotel is the Inn by the Sea Hotel, 7830 Fay Avenue, La Jolla

The conference hall for all sessions is The Cuvier Club, 7776 Eads Avenue, La Jolla

Another conference hotel is the La Valencia Hotel, 1132 Prospect Street, La Jolla

Another conference hotel is the Empress Hotel, 7766 Fay Avenue, La Jolla

The restaurant for Monday evening dinner at Hennessey's, 7811 Herschel Ave, La Jolla

OVERVIEW OF THE SCHEDULE OF THE ENTIRE CONFERENCE

SUNDAY, JUNE 25

4:00pm – 6:00pm. Informal reception, Café La Re, La Valencia Hotel

6pm. Dinner. Restaurant of your choice

MONDAY, JUNE 26

7:00am – 8:00 am. Breakfast, Inn by the Sea Hotel

8:15am – 8:30am. Welcome, Cuvier Club

8:30am – 10:00am. Session One, Cuvier Club

Empirical Research on Employee Share Ownership, Main Room

Panel: Unions and Employee Share Ownership, North Atrium

Law and Economics Theory Session, South Atrium

10:00am – 10:30am. Break, Cuvier Club, Entrance Area

10:30 am – 12:00 pm. Session Two, Cuvier Club

Empirical Research on Equity Compensation, Main Room

Empirical Research and Theory on Worker Ownership, North Atrium

The Role of State Centers of Employee Ownership in Education/Research, South Atrium

12:00pm – 2:00pm. Lunch, Cuvier Club, *Luncheon Theme Tables*, Main Room

2:00 pm – 3:00 pm. Session Three, Cuvier Club

Body of Work Presentation: Worker Cooperatives, John Pencavel, Main Room

3:00pm – 3:30pm. Break, Cuvier Club, Entrance Area

3:30pm – 5:00pm. Session Four, Cuvier Club

Equity Compensation: Trends and Case Studies, North Atrium

Worker Cooperatives: A Panel Discussion on Research and Developments, Main Room

Paper Development Workshop: Human Resource Management, South Atrium

5:00pm – 6:00pm. Session Five, Cuvier Club, *Mentoring Meetings*, Main Room

6:00pm. Dinner at Hennessey's Restaurant, 7811 Herschel Ave, La Jolla

TUESDAY, JUNE 27

7:00am – 8:15am. Breakfast, Inn by the Sea Hotel

8:30am – 9:30am. Session Six, Cuvier Club

Body of Work Presentation: European Employee Ownership, Erik Poutsma, Main Room

9:30am – 10:30am. Session Seven, Cuvier Club

Empirical Papers on Employee Share Ownership, Main Room

Discussion: Community Economic Development and Employee Ownership, North Atrium

10:30am – 11:00am. Break, Cuvier Club, Entrance Area

11:00am-12:30pm. Session Eight, Cuvier Club

Impact of Employee Ownership on Modest Income Workers/Their Families, Main Room

Financial/Social Problems in Citizen Capital Ownership/Basic Income, North Atrium

12:30pm – 2:00pm. Lunch, Cuvier Club, *Luncheon Theme Tables*, Main Room

2:00pm – 3:00pm. Session Nine, Cuvier Club

Capital Ownership, Invisible Wealth Source: Louis O. Kelso, Patricia Kelso, Main Room

3:00pm – 3:30pm. Break, Cuvier Club, Entrance Area

3:30pm – 5:00pm. Session Ten, Cuvier Club.

A Panel of ESOP Companies: Designing a Conscious Capitalism, Main Room

5:00 pm – 6:00pm. Session Eleven, Cuvier Club, *Mentoring Meetings*, Main Room

6:30pm – 7:30pm. Reception, Cuvier Club, Patio

7:30pm – 9:30pm. Dinner, Awards, and Conclusion, Cuvier Club, Main Room

SCHEDULE FOR JUNE 25, SUNDAY AND JUNE 26, MONDAY

JUNE 25, SUNDAY

Opening informal meet-up and reception - 4:00pm – 6:00pm

Location: Café La Re and La Sale Lobby Lounge, La Valencia Hotel, 1132 Prospect Street, La Jolla

JUNE 25, SUNDAY

Dinner – 6:00pm

Note: Conference members and guests will have dinner at the restaurant of their choice in downtown La Jolla in small groups after the initial meet-up and reception.

SCHEDULE FOR JUNE 26, MONDAY

Breakfast – 7:00am – 8:00 am

Location: Special Conference Breakfast Buffet, Conference Room, Inn by the Sea Hotel, 7830 Fay Avenue

Note: This is an additional breakfast buffet provided for conference guests. The hotel-provided breakfast is also available at the Breakfast Room near the pool, Inn by the Sea Hotel, 7830 Fay Avenue

JUNE 26, MONDAY

Brief Welcoming Remarks – 8:15am – 8:30am

Location: Cuvier Club, 7776 Eads Avenue, La Jolla, Main Room

Note: The Cuvier Club is a 5 minute walk from the conference hotels.

James Hayton, Dean and Distinguished Professor, Rutgers University School of Management and Labor Relations; Doctorate in human resource management from the W.T. Beebe Institute of Personnel and Employment Relations at the Robinson College of Business at Georgia State University

Adrienne Eaton, Associate Dean and Professor, Labor Studies and Employment Relations, Rutgers University, School of Management and Labor Relations; Doctorate in industrial relations from the University of Wisconsin

Joseph Blasi, J. Robert Beyster Distinguished Professor and Director, Fellowship Program, Rutgers University School of Management and Labor Relations Research Associate, National Bureau for Economic Research; Doctorate in education from Harvard University

SCHEDULE FOR JUNE 26, MONDAY

Douglas Kruse, J. Robert Beyster Faculty Fellow and Distinguished Professor and Associate Director, Fellowship Program, Rutgers University School of Management and Labor Relations; Research Associate, National Bureau for Economic Research; former Senior Economist, Office of the President, Council of Economic Advisors, The White House; Doctorate in economics from Harvard University

Mary Ann Beyster, President, Foundation for Enterprise Development; MA from the MIT Sloan School of Management

Beth Schriefer, Program Coordinator and Conference Coordinator, Fellowship Program, Rutgers University School of Management and Labor Relations

JUNE 26, MONDAY

SESSION ONE – 8:30am – 10:00am

Location: Cuvier Club, Main Room

Empirical Research on Employee Share Ownership

Chair: **Edward Carberry**, J. Robert Beyster Fellow and Blue Wolf Capital Fellow, Rutgers University, School of Management and Labor Relations; Assistant Professor, Management, University of Massachusetts at Boston College of Management; Doctorate in sociology from Cornell University

Paper: Employee Ownership and Economic Well-Being: Household Wealth, Job Stability, and Employment Quality among Employee-Owners Age 28 to 34

Nancy Wiefek, Robert W. Edwards Fellowship for Advanced Study of Employee Stock Ownership, Rutgers University School of Management and Labor Relations; Research Project Director, National Center for Employee Ownership; Doctorate in political science from Pennsylvania State University, 15 minutes

Discussants:

Alex Brill, Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; Founder, Matrix Global Advisors; Resident Fellow, The American Enterprise Institute for Public Policy Research; Former Policy Director and Chief Economist, U.S. House of Representatives Ways and Means Committee, and Former Staff Member of The President's Council of Economic Advisors, The White House; MA in mathematical finance from Boston University, 6 minutes

Doug Kruse, J. Robert Beyster Faculty Fellow and W.K. Kellogg Fellow and Distinguished Professor and Associate Director, Fellowship Program, Rutgers University School of Management and Labor Relations; Research Associate, National Bureau for Economic Research; former Senior Economist, Office of the President, Council of

SCHEDULE FOR JUNE 26, MONDAY

Economic Advisors, The White House; Doctorate in economics from Harvard University, 6 minutes

Paper: Employee Ownership and Firm Performance: A Meta-Analysis

Earnest H. O'Boyle, Professor, Management and Organizations, Indiana University; Doctorate in organizational behavior from Virginia Commonwealth University, 15 minutes

Discussants:

Iiona Babenko, J. Robert Beyster Fellow, Rutgers University, School of Management and Labor Relations; Associate Professor, Finance, Arizona State University; Doctorate in finance from the University of California at Berkeley, 6 minutes

Ellora Derenoncourt, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Harvard University, Department of Economics, 6 minutes

Brief Research Updates

Ellora Derenoncourt, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Harvard University, Department of Economics. *Research Topic: The Effects of Differential Levels of Employee Ownership Benefits on Employee Satisfaction and Quit Rates*, 1 minute

Presentation of the Book: How Did Employee Ownership Firms Weather the Last Two Recessions? Employee Ownership, Employment Stability, and Firm Survival: 1999-2011. By Fidan Ana Kurtulus and Douglas L. Kruse. Kalamazoo, Michigan: W.E. Upjohn Institute for Employment Research, 2017.

Fidan Kurtulus, Senior Fellow, J. Robert Beyster Fellow, Joseph Cabral Distinguished Scholar and Fellow, and Michael W. Huber Fellow, Rutgers University, School of Management and Labor Relations; Associate Professor, Economics, University of Massachusetts at Amherst; Doctorate in economics from Cornell University, 2 minutes

Douglas Kruse, J. Robert Beyster Faculty Fellow and Distinguished Professor and Associate Director, Fellowship Program, Rutgers University School of Management and Labor Relations; Research Associate, National Bureau for Economic Research; former Senior Economist, Office of the President, Council of Economic Advisors, The White House; Doctorate in economics from Harvard University, 2 minutes

A Book Party and Book Signing will immediately follow this session during the break at the entrance to the Cuvier Club.

SCHEDULE FOR JUNE 26, MONDAY

JUNE 26, MONDAY

CONCURRENT SESSION

8:30am – 10:00am

Location: Cuvier Club, North Atrium

A Panel: Unions and Employee Share Ownership – What Are The Key Research Issues?

Chair: Sanjay Pinto, W.K. Kellogg Foundation Fellow and Louis O. Kelso Fellow and Post-Doctoral Associate, Labor Studies and Employment Relations, Rutgers University, School of Management and Labor Relations; Doctorate in sociology from Harvard University

Overview of National Data on Employee Ownership and Unions (with Jung ook Kim)

Sanjay Pinto, W.K. Kellogg Foundation Fellow and Louis O. Kelso Fellow and Post-Doctoral Associate, Labor Studies and Employment Relations, Rutgers University, School of Management and Labor Relations; Doctorate in sociology from Harvard University, 10 minutes

Case Study: An Online Platform for Union Members to Deliver Home Health Care

Abby Solomon, Carina Care and Service Employees International Union 775, 5 minutes

<https://www.carinacare.com/>

Case Study: A Union's Role in a Retail Employee-Owned Business With an ESOP

Tricia McTague, Kevin Ruble Fellow, Rutgers University School of Management and Labor Relations and Assistant Professor, Eastern Michigan University, Department of Sociology; Doctorate in sociology from North Carolina State University, 5 minutes

New Developments: Union Initiatives with Worker Cooperatives

Chris Michael, Rutgers Research Fellow and Q.A. Shaw McKean Jr. Fellow, Rutgers University School of Management and Labor Relations; General Counsel, The ICA Group; Founder, New York City and New York State Worker Cooperative Business Association; Attorney in New York and New Jersey; J.D., City University of New York; Ph.D. candidate, Department of Political Science, City University of New York, 5 minutes

SCHEDULE FOR JUNE 26, MONDAY

Camille Kerr, Co-Director, Workers to Owners Project, Democracy at Work Institute; Former Director of Research, National Center for Employee Ownership; J.D. from the University Of Cincinnati College Of Law, 5 minutes

Two Case Studies: Unions in Employee-Owned Companies

Chris Mackin, Ray Carey Fellow and Adjunct Lecturer, Rutgers University School of Management and Labor Relations; Faculty Member, Harvard Trade Union Program, Harvard Law School Labor and Worklife Program; Partner, American Working Capital, LLC; Special Advisor, New Jersey/New York Employee Ownership Center; Founder and CEO, Ownership Associates; Former Sidney Harman Fellow, Harvard University JFK School of Government; Doctorate in human development from the Harvard University School of Education, 5 minutes

Case Study: A Large Unionized ESOP With Modest Income Workers

Mark Lomele, Chief Financial Officer, Recology, 5 minutes

Discussants:

Adrienne Eaton, Associate Dean and Professor, Labor Studies and Employment Relations, Rutgers University, School of Management and Labor Relations; Doctorate in industrial relations from the University of Wisconsin, 10 minutes

Wilma Liebman, Visiting Research Fellow, Rutgers University, School of Management and Labor Relations; former Chair, National Labor Relations Board; J.D., George Washington University Law School, 10 minutes

JUNE 26, MONDAY

CONCURRENT SESSION

8:30am – 10:00am

Location: Cuvier Club, South Atrium

Law and Economics Theory Session

Chair: Richard Simpson, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Assistant Professor, Humanities, University of Alaska Southeast; Doctorate in modern thought and literature from Stanford University

SCHEDULE FOR JUNE 26, MONDAY

Paper: Introduction to the Economic Theory That Gave Rise to the ESOP

Robert Ashford, Faculty Mentor and Fellow, Fellowship Program, Rutgers University School of Management and Labor Relations; Professor of law, Syracuse University School of Law; J.D. from the Harvard Law School, 30 minutes

Discussants:

Andrzej Baranski Madrigal, Corey Rosen Fellowship, Assistant Professor, Maastricht University-The Netherlands; Doctorate in economics from Ohio State University, 10 minutes

Tony Fang, J. Robert Beyster Fellow, Rutgers University, School of Management and Labor Relations Stephen Jarislowsky Chair in Economic and Cultural Transformation at Memorial University of Newfoundland; Doctorate in industrial relations and human resource management from the University of Toronto, 10 minutes

Brief Research Update

Andrzej Baranski Madrigal, Corey Rosen Fellow, Rutgers University, School of Management and Labor Relations, Assistant Professor, Maastricht University-The Netherlands; Doctorate in economics from Ohio State University. *Research Topic: An Experimental Design to Test Pre-distributive Bargaining Related to Employee Ownership and Profit Sharing*, 1 minute

JUNE 26, MONDAY

Break – 10:00am – 10:30am

Location: Cuvier Club, Entrance Area

JUNE 26, MONDAY

SESSION TWO – 10:30 am-12:00 pm

Location: Cuvier Club, Main Room

Empirical Research on Equity Compensation

Co-Chairs: **James Hayton**, Dean and Distinguished Professor, Rutgers University, School of Management and Labor Relations; Doctorate in human resource management from the W.T. Beebe Institute of Personnel and Employment, Robinson College of Business, Georgia State University; **Martin Staubus**, Executive Director, Beyster Institute and MBA Program Instructor, University of California at San Diego Rady School of Management; Former policy analyst and staff attorney, U.S. Department of Labor; J.D., Golden State University

SCHEDULE FOR JUNE 26, MONDAY

Paper: Will I Get Paid? Employee Stock Options and Mergers and Acquisitions

Iona Babenko, J. Robert Beyster Fellow, Rutgers University, School of Management and Labor Relations; Associate Professor, Finance, Arizona State University; Doctorate in finance from the University of California at Berkeley, 15 minutes

Discussant: Francesco Bova, Joseph Cabral Fellow and Equatex Fellow and Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; Associate Professor of accounting, University of Toronto Rotman School of Management; Doctorate in accounting from the Yale School of Management, 10 minutes

Paper: Paying for the Future: Examining Gender Gaps in Employee Equity Grants

Felice Klein, Corey Rosen Fellow, Rutgers University School of Management and Labor Relations; Assistant Professor, School of Human Resources and Labor Relations, Michigan State University; Doctorate in human resource studies from the Cornell University School of Industrial and Labor Relations, 7 minutes

Ryan Hammond, Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; CEO and Co-Founder, Syndio; Doctorate in management from the Sloan School of Management, Institute of Work and Employment Research, 7 minutes

Discussant: Edward Carberry, J. Robert Beyster Fellow and Blue Wolf Capital Fellow, Rutgers University, School of Management and Labor Relations; Assistant Professor, Management, University of Massachusetts at Boston College of Management; Doctorate in sociology from Cornell University, 10 minutes

Paper: The Cross-section of Non-wage Amenities: Who Uses Them and Why?

Christos Makridis, Fidelity Investments Fellow in Equity Compensation, Rutgers University School of Management and Labor Relations; Ph.D. candidate, Stanford University, Department of Management Science and Engineering, 15 minutes

Discussants:

Tony Fang, J. Robert Beyster Fellow, Rutgers University, School of Management and Labor Relations Stephen Jarislowsky Chair in Economic and Cultural Transformation at Memorial University of Newfoundland, Adjunct Associate Professor (Research) University of Toronto Centre for Innovation and Research (IIC); Doctorate in industrial relations and human resource management from the University of Toronto, 6 minutes

SCHEDULE FOR JUNE 26, MONDAY

Joo Hoo Han, Louis O. Kelso Fellow and Morgan Stanley Fellow, and Assistant Professor, Department of Human Resource Management, Rutgers University, School of Management and Labor Relations; Doctorate in organizational behavior and human resources from the University of Maryland, 6 minutes

Brief Research Updates

Joo Hoo Han, Louis O. Kelso Fellow and Morgan Stanley Fellow, and Assistant Professor, Department of Human Resource Management, Rutgers University, School of Management and Labor Relations; Doctorate in organizational behavior and human resources from the University of Maryland. *Research Topic: The Micro-Foundations of the Effects of Employee Stock Ownership Plans: Focusing on Employee Perceptions of Empowerment, Fairness, and Identity*, 1 minute

Christos Makridis, Fidelity Investments Fellow in Equity Compensation, Rutgers University School of Management and Labor Relations; Ph.D. candidate, Stanford University, Department of Management Science and Engineering. *Research Topic: Non-wage Amenities*, 1 minute

JUNE 26, MONDAY

CONCURRENT SESSION

10:30 am –12:00 pm

Location: Cuvier Club, North Atrium

Empirical Research and Theory on Worker Ownership

Chair: **Suzanne Cromlish**, Lecture, Management, St. Xavier University; Ph.D. candidate, Management, Case Western Reserve University

Paper: Transforming Businesses into Worker Cooperatives: The Hostile Takeover

Mike Leung, Rutgers Research Fellow, Rutgers University School of Management and Labor Relations; Doctorate in physics from Princeton University, 15 minutes

Discussant: David Ellerman, Faculty Mentor and Fellow, Fellowship Program, Rutgers University School of Management and Labor Relations; Visiting Scholar, University of California at Riverside; Senior Fellow, Center on Global Justice, University of California at San Diego; Doctorate in mathematics from Boston University, 10 minutes

SCHEDULE FOR JUNE 26, MONDAY

Paper: Do Customers Value Products from Employee Owned Firms?

Philip Melizzo, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations and Assistant Professor, College of Wooster, Department of Economics; Doctorate in economics from the University of Massachusetts at Amherst, 15 minutes

Discussants:

Fidan Kurtulus, Senior Fellow, J. Robert Beyster Fellow, Joseph Cabral Distinguished Scholar and Fellow, and Michael W. Huber Fellow, Rutgers University, School of Management and Labor Relations; Associate Professor, Economics, University of Massachusetts at Amherst; Doctorate in economics from Cornell University, 6 minutes

Erik Olsen, Rob Edwards Fellow and Joseph Cabral Distinguished Scholar and Fellow and Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Associate Professor of economics, University of Missouri at Kansas City; Doctorate in economics from the University of Massachusetts at Amherst, 6 minutes

Brief Research Updates

Fidan Kurtulus, Senior Fellow, J. Robert Beyster Fellow, Joseph Cabral Distinguished Scholar and Fellow, and Michael W. Huber Fellow, Rutgers University, School of Management and Labor Relations; Associate Professor, Economics, University of Massachusetts at Amherst; Doctorate in economics from Cornell University, 1 minute

Saehee Kang, Corey Rosen Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations. *Research Topic: Does Employee Stock Ownership Work Across Cultures?*, 1 minute

Jung ook Kim, Research Assistant, Rutgers-W.K. Kellogg Foundation Research Project on Employee Ownership; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations. *Research Topic: Does Participation in a Workplace Spill Over into Political Participation? A Perspective on the Role of Shared Capitalism*, 1 minute

SCHEDULE FOR JUNE 26, MONDAY

JUNE 26, MONDAY

CONCURRENT SESSION

10:30 am –2:00 pm

Location: Cuvier Club, South Atrium

The Role of State Centers of Employee Ownership in Education and Research

Chair: Loren Rodgers, Executive Director, National Center for Employee Ownership
<https://www.nceo.org/>

California Center for Employee Ownership

<http://ownershipcalifornia.org/>

Anthony Matthews, Secretary, California Center for Employee Ownership, Beyster Institute, University of California at San Diego Rady School of Management; Senior Consultant and MBA Program Program Instructor and Former Director, Beyster Institute

Indiana Center for Employee Ownership

Rick Van Doel, President, CEO, and Founder, Indiana Center for Employee Ownership; Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; President and CEO of Performance Validation; Doctorate in organizational leadership, from Indiana Wesleyan University

New Jersey/New York Center for Employee Ownership

<http://ownership.rutgers.edu/>

Jim Terez, Associate Director, New Jersey/New York Center for Employee Ownership; Teaching Instructor, Human Resource Management, Rutgers University School of Management and Labor Relations; M.B.A. from New York University and MA from Rutgers University

Chris Mackin, Special Advisor, New Jersey/New York Center for Employee Ownership; Ray Carey Fellow and Adjunct Lecturer of human resource management, Rutgers University School of Management and Labor Relations; Faculty Member, Harvard Trade Union Program, Harvard Law School Labor and Worklife Program; Partner, American Working Capital, LLC; Founder and President, Ownership Associates; Former Sidney Harman Fellow, Harvard University JFK School of Government; Doctorate in human development from the Harvard University School of Education

SCHEDULE FOR JUNE 26, MONDAY

Pennsylvania Center for Employee Ownership

<http://www.ownershippennsylvania.org/>

Kevin McPhillips, Director

Rocky Mountain Employee Ownership Center

<http://www.rmeoc.org/>

Halisi Vinson, Executive Director, Rocky Mountain Employee Ownership Center; M.B.A. from Babson College F.W. Olin School of Business

Legislative Developments on a State Center in New York State

Chris Michael, Rutgers Research Fellow and Q.A. Shaw McKean Jr. Fellow, Rutgers University School of Management and Labor Relations; General Counsel, The ICA Group; Founder, New York City and New York State Worker Cooperative Business Association; Attorney in New York and New Jersey; J.D., City University of New York; Doctoral candidate, Department of Political Science, City University of New York, 5 minutes

Democracy at Work Institute: Research and Education for Worker Coops Nationally

Melissa Hoover, Executive Director, Democracy at Work Institute; Special Advisor, W.K. Kellogg Research Project, Rutgers University, School of Management and Labor Relations, 5 minutes

For Reference: Information on other Employee Ownership Centers

Ohio: <http://www.oeockent.org/>

Vermont: <http://www.veoc.org/>

Brief Research Updates

Vernon Woodley, Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; Assistant Professor of sociology, Eastern Illinois University; Doctorate in sociology from the University of Iowa. *Research Topic: Why ESOP? A Qualitative Analysis of the Motivating Factors for ESOP Establishment*, 1 minute

Jessica Bonanno, Rutgers Research Fellow, Rutgers University, School of Management and Labor Relations; Chief Financial Officer and Director of Employee Ownership Programs, The Democracy Collaborative (Washington, D.C. think tank). Education: M.B.A. The University of Notre Dame, M.B.A. Fellow and Forte Foundation Fellow. *Research Topic: Impact Investing: The Role of Asset Managers, Asset Investors, and Private Equity in the Development of Employee Ownership*, 1 minute

SCHEDULE FOR JUNE 26, MONDAY

Evan Caspar-Futterman, Rutgers Research Fellowship, Rutgers University School of Management and Labor Relations; Ph.D. candidate, Urban Planning and Public Policy, Rutgers University, Bloustein School of Urban Planning and Public Policy, Research Topic: *Economic Democracy and the Political Economy of Scale*, 1 minute

Cristina Perez, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Visiting Research Fellow, Harvard University; Ph.D. candidate, Literary Studies, Universidad Complutense de Madrid. Madrid, Spain. *Research Topic: Employee Ownership in Popular Culture*, 1 minute

JUNE 26, MONDAY

Lunch - 12:00pm – 2:00pm

Location: Cuvier Club, Main Room

Note: Participants are invited to join a series of luncheon theme tables for informal discussion over lunch of various research opportunities and issues. A selection of boxed lunches will be available at the Entrance Area.

Luncheon Theme Tables

Note: Tables are numbered to correspond to the Luncheon Theme Tables.

Table 1. *Discussion of the Development of the Alaska Dividend Idea for Researchers.* **Senator Mike Gravel**, former Democratic Senator from Alaska. Jointly hosted by **Robert Ashford**, Faculty Mentor and Fellow, Fellowship Program, Rutgers University School of Management and Labor Relations; Professor of law, Syracuse University School of Law; J.D. from the Harvard Law School

Table 2. *Discussion of the W.K. Kellogg Foundation Research on Modest Income Workers and Employee Stock Ownership With the Research Team.* **Members of the Rutgers Kellogg Research Team.** For a listing of team members, see Tuesday, June 26th. Note: The group will split between two tables.

Table 3. *Discussion of the W.K. Kellogg Foundation Research on Modest Income Workers and Employee Stock Ownership With the Research Team.* **Members of the Rutgers Kellogg Research Team.** For a listing of team members, see Tuesday, June 26th. Note: The group will split between two tables.

SCHEDULE FOR JUNE 26, MONDAY

Table 4. *Discussion of the Design of the Survey for the New National ESOP Survey and Research Project.* Note: This will be a technical discussion open to empirical researchers who wish to suggest hypotheses and variables for the new survey. **Jung ook Kim**, Research Assistant, Rutgers-W.K. Kellogg Foundation Research Project on Employee Ownership; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations & **Dan Weltmann**, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations

Table 5. *The Research Behind “Certified Employee-Owned,”* **Thomas Dudley**, Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; Co-Founder, Ownership Alliance; Ph.D. candidate, Stanford University Graduate School of Business, organizational behavior

For reference see: <https://www.certifiedeo.com/about>

Table 6. *Managing an Employee-Owned Company with Modest Income Workers.* **Mark Lomele**, Senior Vice President and Chief Financial Officer, Recology

Table 7. *Toward a Scalable Employee Ownership Investment Model.* **Jessica Bonanno**, Rutgers Research Fellow, Rutgers University, School of Management and Labor Relations; Chief Financial Officer and Director of Employee Ownership Programs, The Democracy Collaborative (Washington, D.C. think tank). Education: M.B.A. The University of Notre Dame, M.B.A. Fellow and Forte Foundation Fellow

Table 8. *Avoiding Litigation Through Employee Ownership Culture.* **Theodore M. Becker**, DrinkerBiddle, J.D., Northwestern University School of Law; Doctorate in sociology from Northwestern University

Table 9. *Using U.S. Census Data to Study and Map the Characteristics of the Location of Employee-owned Firms.* **John Guzek**, Rutgers Research Fellow, Rutgers University, School of Management and Labor Relations; Program Manager, Business Education and Legal Services, Department of Small Business Services, City of New York, Office of Mayor Bill DeBlasio; BA degree in economics, University of North Carolina at Chapel Hill

JUNE 26, MONDAY

CONCURRENT SESSION

Location: North Atrium

Available for meetings

SCHEDULE FOR JUNE 26, MONDAY

JUNE 26, MONDAY

CONCURRENT SESSION

Location: South Atrium

Available for meetings

JUNE 26, MONDAY

SESSION THREE – 2:00 pm – 3:00 pm

Location: Cuvier Club, Main Room

Body of Work Presentation: What We Know and Would Like to Know about Worker Cooperatives? The Work of John Pencavel

Co-Chairs: **Mark Kaswan**, W. K. Kellogg Fellow, J. Robert Beyster Fellow, and Michael W. Huber Fellow, Rutgers University, School of Management and Labor Relations; Assistant Professor, Political Science, University of Texas Rio Grande Valley; Doctorate in political science from UCLA

David Ellerman, Faculty Mentor and Fellow, Fellowship Program, Rutgers University School of Management and Labor Relations; Visiting Scholar, University of California at Riverside; Senior Fellow, Center on Global Justice, University of California at San Diego; Doctorate in mathematics from Boston University

Speaker: John Pencavel, The Pauline K. Levin-Robert L. Levin and Pauline C. Levin-Abraham Levin Professor of Economics, Stanford University; Senior Fellow, Stanford Institute for Economic Policy Research; Doctorate in economics from Princeton University; former President, Society of Labor Economists; former Editor, Journal of Economic Literature, 30 minutes

Note: A selection of Professor Pencavel's papers are in the Dropbox.

Discussants: Erik Olsen, Rob Edwards Fellow and Joseph Cabral Distinguished Scholar and Fellow and Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Associate Professor of economics, University of Missouri at Kansas City; Doctorate in economics from the University of Massachusetts at Amherst, 10 minutes

SCHEDULE FOR JUNE 26, MONDAY

Chris Michael, Rutgers Research Fellow and Q.A. Shaw McKean Jr. Fellow, Rutgers University School of Management and Labor Relations; General Counsel, The ICA Group; Founder, New York City and New York State Worker Cooperative Business Association; Attorney in New York and New Jersey; J.D., City University of New York; Ph.D. candidate, Department of Political Science, City University of New York 5 minutes

Laura Hanson Schlachter, Rutgers Research Fellow, Rutgers University School of Management and Labor Relations; Ph.D. candidate, University of Wisconsin at Madison, Department of Sociology, 5 minutes

Brief Research Update

Laura Hanson Schlachter, Rutgers Research Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, sociology, University of Wisconsin at Madison. *Research Topic: Sociology of Worker Cooperatives Using New Survey Data*, 1 minute

JUNE 26, MONDAY

CONCURRENT SESSION

Location: North Atrium

Available for meetings

JUNE 26, MONDAY

CONCURRENT SESSION

Location: South Atrium

Available for meetings

JUNE 26, MONDAY

Break – 3:00pm – 3:30pm

Location: Cuvier Club – Entrance Area

SCHEDULE FOR JUNE 26, MONDAY

JUNE 26, MONDAY

SESSION FOUR – 3:30pm – 5:00pm

Location: Cuvier Club, North Atrium

Equity Compensation: Trends and Case Studies

Chair: Joo Hoo Han, Louis O. Kelso Fellow and Morgan Stanley Fellow, and Assistant Professor, Department of Human Resource Management, Rutgers University, School of Management and Labor Relations; Doctorate in organizational behavior and human resources, University of Maryland

Computershare: Trends in U.S. Equity Compensation Plans

<https://www.computershare.com/us>

Sheila Frierson, President, Computershare US Plan Managers; Certified Equity Professional, 20 minutes

Issues in a Mature Broad-based Equity Compensation Plan: Qualcomm

<https://www.qualcomm.com/>

<https://benefits.qualcomm.com/#/content/510>

Jill Stipanov, Manager, Total Rewards, Qualcomm, 20 minutes

Illumina: Broad-based Equity Compensation in a Genomics Company

<http://reviews.greatplacetowork.com/illumina-inc>

<https://www.illumina.com/company/about-us/fact-sheet.html>

Claudia Baranowski, Senior Manager, Global Stock Administration, Illumina

Tracy Ward, Director, Global Compensation, Illumina

Discussants:

Ilon Babenko, J. Robert Beyster Fellow, Rutgers University, School of Management and Labor Relations; Associate Professor, Finance, Arizona State University; Doctorate in finance from the University of California at Berkeley, 15 minutes

SCHEDULE FOR JUNE 26, MONDAY

Francesco Bova, Joseph Cabral Fellow and Equatex Fellow and Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; Associate Professor of accounting, University of Toronto Rotman School of Management; Doctorate in accounting from the Yale School of Management, 15 minutes

Resources: (available in Dropbox)

Global Equity Insights Survey Report, Global Equity Organization and others

Global Equity Insights Survey Results Powerpoint by Danyle Anderson and others

Brief Research Updates

Joo Hoo Han, Louis O. Kelso Fellow and Morgan Stanley Fellow, and Assistant Professor, Department of Human Resource Management, Rutgers University, School of Management and Labor Relations; Doctorate in organizational behavior and human resources, University of Maryland, 1 minute

JUNE 26, MONDAY

CONCURRENT SESSION

3:30pm – 5:00pm

Location: Main Room, Cuvier Club

Worker Cooperatives: A Panel Discussion on Research and Developments

Co-Chairs: **Kyle Farmbry**, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Dean of the Graduate School, Rutgers University at Newark; Professor in public affairs and administration at the Rutgers University School of Public Affairs and Administration at Newark; J.D. from the Rutgers University School of Law; Doctorate in philosophy from George Washington University

Alfredo Carlos, Q. E. Shaw McKean Jr. Fellow, Rutgers University School of Management and Labor Relations; Faculty, Political Science and Chicano Latino Studies, California State University at Long Beach; Executive Director, The Foundation for Economic Democracy; Doctorate in political science from the University of California at Irvine

SCHEDULE FOR JUNE 26, MONDAY

Report on the Democracy at Work Institute New Worker Cooperative Survey Research Study

Laura Hanson Schlachter, Rutgers Research Fellow, Rutgers University School of Management and Labor Relations; Ph.D. candidate, University of Wisconsin at Madison, Department of Sociology, 6 minutes

Tim Palmer, Director of Research, Democracy at Work Institute, 6 minutes

State of the Field Report on Worker Ownership Conversions to Worker Coops

Melissa Hoover, Executive Director, Democracy at Work Institute; Special Advisor, W.K. Kellogg Research Project, Rutgers University, School of Management and Labor Relations, 6 minutes

An Industry-based Project in Childcare and Home Care as a Strategy for Getting Worker Coops to Scale

Camille Kerr, Co-Director, Workers to Owners Project, Democracy at Work Institute; Former Director of Research, National Center for Employee Ownership; J.D. from the University Of Cincinnati College Of Law, 6 minutes

Developing Worker Cooperatives in the Absence of an Ecosystem: The Brownsville Plan

Mark Kaswan, W. K. Kellogg Fellow, J. Robert Beyster Fellow, and Michael W. Huber Fellow, Rutgers University, School of Management and Labor Relations; Assistant Professor of political science, University of Texas Rio Grande Valley; Doctorate in political science from UCLA, 6 minutes

Open discussion.

Brief Research Updates

Chris Michael, Rutgers Research Fellow and Q.A. Shaw McKean Jr. Fellow, Rutgers University School of Management and Labor Relations; General Counsel, The ICA Group; Founder, New York City and New York State Worker Cooperative Business Association; Attorney in New York and New Jersey; J.D., City University of New York; Ph.D. candidate, Department of Political Science, City University of New York, 1 minute

Dan Weltmann, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations. *Research Topic: Does Employee Stock Ownership Moderate the Outcomes of Pay Dispersion?*, 1 minute

SCHEDULE FOR JUNE 26, MONDAY

JUNE 26, MONDAY

CONCURRENT SESSION

3:30pm – 5:00pm

Location: South Atrium, Cuvier Club

Paper Development Workshop for the Special Issue of the Journal, Human Resource Management. Topic: Employee Stock Ownership for Managing Human Resources

Co-chairs: Editor of *Human Resource Management*: **James Hayton**, Dean and Distinguished Professor, Rutgers University, School of Management and Labor Relations; Doctorate in human resource management from the W.T. Beebe Institute of Personnel and Employment, Robinson College of Business, Georgia State University

Guest Editor for the Special Issue: **Frank Mullins**, Louis O. Kelso Fellow and Bill Nobles Fellow, Rutgers University, School of Management and Labor Relations; Assistant Professor and UNC System Academic Affairs Faculty Fellow, Management, School of Business and Economics, North Carolina A & T State University; Doctorate in business administration from Syracuse University

Guest Editor for the Special Issue: **Dan Weltmann**, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations

Note: This is a research meeting and not an open session of the conference. It will consist primarily of research mentors and authors having a one-on-one feedback session. The papers will not be presented. For copies of drafts of the papers, please contact the authors. For information, see the *Call for Papers HRM Special Issue: Employee Stock Ownership for Managing Human Resources* in the Dropbox or email lead editor, Frank Mullins at: frank.i.mullins@gmail.com

SCHEDULE FOR JUNE 26, MONDAY

JUNE 26, MONDAY

SESSION FIVE: 5:00pm – 6:00pm

Mentoring Meetings

Please meet with new fellows who have requested mentoring on their research-projects that are now underway. Faculty Mentors are requested to divide themselves among the sessions. Mentors will gather around separate tables with one research scholar. Three rooms are available for mentoring.

Location 1: Cuvier Club, Main Room

Jessica Bonanno, Rutgers Research Fellow, Rutgers University, School of Management and Labor Relations; Chief Financial Officer and Director of Employee Ownership Programs, The Democracy Collaborative (Washington, D.C. think tank). Education: M.B.A. The University of Notre Dame, M.B.A. Fellow and Forte Foundation Fellow. *Research Topic: Impact Investing: The Role of Asset Managers, Asset Investors, and Private Equity in the Development of Employee Ownership*

David Calnitzky, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Department of Sociology, University of Wisconsin. *Research Topic: The Labor Market and Its Alternatives: Investigating Manitoba's Mincome Experiment"*

Evan Caspar-Futterman, Rutgers Research Fellowship, Rutgers University School of Management and Labor Relations; Ph.D. candidate, Urban Planning and Public Policy, Rutgers University, Bloustein School of Urban Planning and Public Policy, *Research Topic: Economic Democracy and the Political Economy of Scale*

Ellora Derenoncourt, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Harvard University, Department of Economics. *Research Topic: The Effects of Differential Levels of Employee Ownership Benefits on Employee Satisfaction and Quit Rates*

Joo Hoo Han, Louis O. Kelso Fellow and Morgan Stanley Fellow, and Assistant Professor, Department of Human Resource Management, Rutgers University, School of Management and Labor Relations; Doctorate in organizational behavior and human resources, University of Maryland. *Research Topic: The Micro-Foundations of the Effects of Employee Stock Ownership Plans: Focusing on Employee Perceptions of Empowerment, Fairness, and Identity*

SCHEDULE FOR JUNE 26, MONDAY

Mentoring Meetings (continued)

Saehee Kang, Corey Rosen Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations. *Research Topic: Does Employee Stock Ownership Work across Cultures?*

Location 2: Cuvier Club, North Atrium

Jung ook Kim, Research Assistant, Rutgers-W.K. Kellogg Foundation Research Project on Employee Ownership; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations. *Research Topic: Does Participation in a Workplace Spill Over into Political Participation? A Perspective on the Role of Shared Capitalism*

Andrzej Baranski Madrigal, Corey Rosen Fellow, Rutgers University, School of Management and Labor Relations, Assistant Professor, Maastricht University-The Netherlands; Doctorate in economics from Ohio State University. *Research Topic: An Experimental Design to Test Pre-distributive Bargaining Related to Employee Ownership*

Christos Makridis, Fidelity Investments Fellow in Equity Compensation, Rutgers University School of Management and Labor Relations; Ph.D. candidate, Stanford University, Department of Management Science and Engineering. *Research Topic: Non-wage Amenities*

Location 3: Cuvier Club, South Atrium

Cristina Perez, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Visiting Research Fellow, Harvard University; Ph.D. candidate in Literary Studies, Universidad Complutense de Madrid. Madrid, Spain. *Research Topic: Employee Ownership in Popular Culture*

Laura Hanson Schlachter, Rutgers Research Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, sociology, University of Wisconsin at Madison. *Research Topic: Sociology of Worker Cooperatives Using New Survey Data*

Dan Weltmann, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations. *Research Topic: Does Employee Stock Ownership Moderate the Outcomes of Pay Dispersion?*

JUNE 26, MONDAY

Dinner – 6:00pm

Location: Hennessey's Restaurant, 7811 Herschel Ave, La Jolla

SCHEDULE FOR JUNE 27, TUESDAY

JUNE 27, TUESDAY

Breakfast – 7:00am – 8:15am

Location: Special Conference Breakfast Buffet, Conference Room, Inn by the Sea Hotel, 7830 Fay Avenue

Note: This is an additional breakfast buffet provided for conference guests. The hotel-provided breakfast is also available at the Breakfast Room near the pool, Inn by the Sea Hotel, 7830 Fay Avenue

JUNE 27, TUESDAY

SESSION SIX – 8:30am – 9:30am

Location: Cuvier Club, Main Room

Body of Work Presentation: European Employee Ownership Research, The Work of Erik Poutsma

Chair: **Doug Kruse**, J. Robert Beyster Faculty Fellow and W.K. Kellogg Fellow and Distinguished Professor and Associate Director, Fellowship Program, Rutgers University School of Management and Labor Relations; Research Associate, National Bureau for Economic Research; former Senior Economist, Office of the President, Council of Economic Advisors, The White House; Doctorate in economics from Harvard University,

Speaker: Erik Poutsma, Faculty Mentor and Fellow, Rutgers University School of Management and Labor Relations; Associate Professor, Comparative Research of Employment Relations, Radboud University Nimegen School of Management; Doctorate in business administration from the University of Nimegen School of Management, 20 minutes

Note: A selection of Professor Poutsma's papers are in the Dropbox.

Discussants:

Philip Melizzo, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations and Assistant Professor, College of Wooster, Department of Economics; Doctorate in economics from the University of Massachusetts at Amherst, 6 minutes

Daphne Berry, W. K. Kellogg Fellow and J. Robert Beyster Fellow, Rutgers University, School of Management and Labor Relations; Assistant Professor, University of Hartford, Barney School of Business, Department of Management; Doctorate in management from the University of Massachusetts at Amherst, 6 minutes

SCHEDULE FOR JUNE 27, TUESDAY

Sanjay Pinto, W.K. Kellogg Foundation Fellow and Louis O. Kelso Fellow and Post-Doctoral Associate, Labor Studies and Employment Relations, Rutgers University, School of Management and Labor Relations; Doctorate in sociology from Harvard University, 6 minutes

Brief Research Updates

Rick Van Doel, President, CEO, and Founder, Indiana Center for Employee Ownership; Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; President and CEO of Performance Validation; Doctorate in organizational leadership from Indiana Wesleyan University, 1 minute

Note: There is no formal break. Coffee and snacks will be available at the entrance of the Cuvier Club.

JUNE 27, TUESDAY

CONCURRENT SESSION

8:30am – 9:30am

Location: North Atrium

Available for meetings

JUNE 27, TUESDAY

CONCURRENT SESSION

8:30am – 9:30am

Location: South Atrium

Available for meetings

SCHEDULE FOR JUNE 27, TUESDAY

JUNE 27, TUESDAY

SESSION SEVEN - 9:30am – 10:30am

Empirical Papers on Employee Share Ownership

Location: Cuvier Club, Main Room

Chair: **Cristina Perez**, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Visiting Research Fellow, Harvard University; Ph.D. candidate in Literary Studies, Universidad Complutense de Madrid. Madrid, Spain

ESOP Plus Benefit Corporation: Ownership Culture With Benefit Accountability

Nancy Kurland, Kevin Ruble Fellow in Conscious Capitalism, Rutgers University School of Management and Labor Relations; Associate Professor, Department of Business, Organization, and Society, Franklin & Marshall College; Doctorate in business, government, and society and organizational behavior from the J.M. Katz School of Business, University of Pittsburgh, 15 minutes

Discussant: Thomas Dudley, Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; Co-Founder, Ownership Alliance; Ph.D. candidate, Stanford University Graduate School of Business, organizational behavior, 10 minutes

Does Participation in a Workplace Spill Over into Political Participation? A Perspective on the Role of Shared Capitalism

Jung ook Kim, Research Assistant, Kellogg Research Project, Rutgers University School of Management and Labor Relations; Ph.D. candidate, Rutgers University School of Management and Labor Relations, Industrial Relations and Human Resources, 15 minutes

Discussant: Mark Kaswan, W. K. Kellogg Fellow, J. Robert Beyster Fellow, and Michael W. Huber Fellow, Rutgers University, School of Management and Labor Relations; Assistant Professor, Political Science, University of Texas Rio Grande Valley; Doctorate in political science from UCLA, 10 minutes

Brief Research Updates

Jung ook Kim, Research Assistant, Kellogg Research Project, Rutgers University School of Management and Labor Relations; Ph.D. candidate, Rutgers University School of Management and Labor Relations, Industrial Relations and Human Resources, 1 minute

SCHEDULE FOR JUNE 27, TUESDAY

JUNE 27, TUESDAY

CONCURRENT SESSION

9:30am – 10:30am

Location: Cuvier Club, North Atrium

Open Discussion of Community Economic Development and Employee Share Ownership

JUNE 27, TUESDAY

CONCURRENT SESSION

9:30am – 10:30am

Location: Cuvier Club, South Atrium

Available for meetings.

JUNE 27, TUESDAY

Break – 10:30am-11:00am

Location: Cuvier Club, Entrance Area

JUNE 27, TUESDAY

SESSION EIGHT - 11:00am-12:30pm

Location: Cuvier Club, Main Room

The Rutgers University Two-Year W.K. Kellogg Foundation Research Project: The Impact of Employee Ownership on Modest Income Workers and Their Families

Chair: Douglas Kruse, J. Robert Beyster Faculty Fellow and Distinguished Professor and Associate Director, Fellowship Program, Rutgers University School of Management and Labor Relations; Research Associate, National Bureau for Economic Research; former Senior Economist, Office of the President, Council of Economic Advisors, The White House; Doctorate in economics from Harvard University

SCHEDULE FOR JUNE 27, TUESDAY

Presenters:

Carol Stack, W.K. Kellogg Fellow, Rutgers University School of Management and Labor Relations; Professor Emeritus, University of California at Berkeley Graduate School of Education; Doctorate in anthropology from the University of Illinois at Champaign-Urbana, 5 minutes

Lisa Schur, W.K. Kellogg Fellow, Rutgers University School of Management and Labor Relations; Professor and Chair, Labor Studies and Employment Relations, Rutgers University School of Management and Labor Relations; J. D., Northeastern University School of Law; Doctorate in political science from the University of California at Berkeley, 5 minutes

Sanjay Pinto, W.K. Kellogg Fellow and Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; Post-Doctoral Associate, Department of Labor Studies and Employment Relations, Rutgers University School of Management and Labor Relations; Doctorate in sociology from Harvard University, 5 minutes

Mark Kaswan, W. K. Kellogg Fellow, J. Robert Beyster Fellow, and Michael W. Huber Fellow, Rutgers University, School of Management and Labor Relations; Assistant Professor, Political Science, University of Texas Rio Grande Valley; Doctorate in political science from UCLA, 5 minutes

Glenda Gracia-Rivera, W. K. Kellogg Fellow and Research Coordinator, Rutgers University, School of Management and Labor Relations Rutgers-Kellogg Research Project; Associate Director, Center for Women and Work (CWW), Rutgers University, School of Management and Labor Relations; MA from Seton Hall University in public administration, 5 minutes

Terri Boyer, Louis O. Kelso Fellow and W. K. Kellogg Fellow, Rutgers University, School of Management and Labor Relations; Executive Director, Center for Women and Work (CWW), Rutgers University, School of Management and Labor Relations and Assistant Research Professor, Labor Studies and Employment Relations Department, Rutgers University, School of Management and Labor Relations; Doctorate in education from the University of Alabama, 5 minutes

Janet Boguslaw, W. K. Kellogg Fellow, Rutgers University, School of Management and Labor Relations; Lecturer, Senior Scientist, and Associate Director, Institute on Assets and Social Policy, Brandeis University, Heller School for Social Policy and Management; Doctorate in sociology from Boston College, 5 minutes

Kristen Bethune, W. K. Kellogg Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Sociology, University of North Carolina at Greensboro, 5 minutes

SCHEDULE FOR JUNE 27, TUESDAY

Daphne Berry, W. K. Kellogg Fellow and J. Robert Beyster Fellow, Rutgers University, School of Management and Labor Relations; Assistant Professor, University of Hartford, Barney School of Business, Department of Management; Doctorate in management from the University of Massachusetts at Amherst, 5 minutes

Alex Becker, Research Assistant, Kellogg Research Project, Rutgers University School of Management and Labor Relations; Former Co-Chair, Seattle Human Rights Commission; BA in Political Economy and Sociology, The Evergreen State College, 5 minutes

Jung ook Kim, Research Assistant, Kellogg Research Project, Rutgers University School of Management and Labor Relations; Ph.D. candidate, Rutgers University School of Management and Labor Relations, Industrial Relations and Human Resources, 5 minutes

Open discussion.

JUNE 27, TUESDAY

CONCURRENT SESSION

11:00am-12:30pm

Location: Cuvier Club: South Atrium

A Panel: Studying the Financial and Social Problems in Broad-Based Capital Ownership and Basic Income for Citizens

Chair: Joseph Blasi, J. Robert Beyster Distinguished Professor and Director, Fellowship Program, Rutgers University School of Management and Labor Relations Research Associate, National Bureau for Economic Research; Doctorate in education from Harvard University

How The Idea of A Citizens Trust for Broad-based Income for Alaska Citizens Developed

Special Guest: **Senator Mike Gravel** (D-Alaska), 15 minutes

The Proposed Basic Income Program for Oakland, California

Alex Nawar, Research Manager, Basic Income Program, Y Combinator Research, 15 minutes

Resource: <https://blog.ycombinator.com/moving-forward-on-basic-income/>

SCHEDULE FOR JUNE 27, TUESDAY

The Sociology of What Citizens With Broad-based Income Plans Do

Sarah Reibstein, National Science Foundation Graduate Research Fellow, Princeton University, Ph.D. candidate, Sociology, Princeton University, 10 minutes

The Kelso Capital Income Plan for Puerto Rico and the Policy Debate About It

Joseph Blasi, J. Robert Beyster Distinguished Professor and Director, Fellowship Program, Rutgers University School of Management and Labor Relations Research Associate, National Bureau for Economic Research; Doctorate in education from Harvard University, 10 minutes

Discussants:

Robert Ashford, Faculty Mentor and Fellow, Fellowship Program, Rutgers University School of Management and Labor Relations; Professor of law, Syracuse University School of Law; J.D. from the Harvard Law School, 10 minutes

David Calnitsky, Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; Social Sciences and Humanities Research Council (SSHRC) Postdoctoral Fellow, University of Manitoba, Sociology and Community Health Sciences; Ph.D. candidate, sociology, University of Wisconsin at Madison, 10 minutes

Brief Research Updates

David Calnitsky, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Department of Sociology, University of Wisconsin. *Research Topic: The Labor Market and Its Alternatives: Investigating Manitoba's Mincome Experiment*", 1 minute

JUNE 27, TUESDAY

CONCURRENT SESSION

11:00am-12:30pm

Location: Cuvier Club: South Atrium

Available for meetings.

SCHEDULE FOR JUNE 27, TUESDAY

JUNE 27, TUESDAY

LUNCH - 12:30pm – 2:00pm

Location: Cuvier Club, Main Room

Note: Participants are invited to join a series of theme tables for informal discussion over lunch of various research opportunities and issues. A selection of boxed lunches will be available at the Entrance Area.

Luncheon Theme Tables

Note: Tables are numbered to correspond to the Luncheon Theme Tables.

Table 1. *Discussion of the Development of the Alaska Dividend Idea for Researchers.* **Senator Mike Gravel**, former Democratic Senator from Alaska. Jointly hosted by **Robert Ashford**, Faculty Mentor and Fellow, Fellowship Program, Rutgers University School of Management and Labor Relations; Professor of law, Syracuse University School of Law; J.D. from the Harvard Law School

Table 2. *Discussion of the W.K. Kellogg Foundation Research on Modest Income Workers and Employee Stock Ownership With the Research Team.* Members of the Rutgers Kellogg Research Team. For a listing of team members, see Tuesday, June 26th.
Note: The group will split between two tables.

Table 3. *Discussion of the W.K. Kellogg Foundation Research on Modest Income Workers and Employee Stock Ownership With the Research Team.* Members of the Rutgers Kellogg Research Team. For a listing of team members, see Tuesday, June 26th.
Note: The group will split between two tables.

Table 4. *Discussion of the Design of the Survey for the New National ESOP Survey and Research Project.* Note: This will be a technical discussion open to empirical researchers who wish to suggest hypotheses and variables for the new survey. **Jung ook Kim**, Research Assistant, Rutgers-W.K. Kellogg Foundation Research Project on Employee Ownership; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations & **Dan Weltmann**, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations

Table 5. *The Research Behind “Certified Employee-Owned,”* **Thomas Dudley**, Louis O. Kelso Fellow, Rutgers University School of Management and Labor Relations; Co-Founder, Ownership Alliance; Ph.D. candidate, Stanford University Graduate School of Business, organizational behavior.

Table 6. *Managing an Employee-Owned Company with Modest Income Workers*. **Mark Lomele**, Senior Vice President and Chief Financial Officer, Recology
SCHEDULE FOR JUNE 27, TUESDAY

Table 7. *Toward a Scalable Employee Ownership Investment Model*. **Jessica Bonanno**, Rutgers Research Fellow, Rutgers University, School of Management and Labor Relations; Chief Financial Officer and Director of Employee Ownership Programs, The Democracy Collaborative (Washington, D.C. think tank). Education: M.B.A. The University of Notre Dame, M.B.A. Fellow and Forte Foundation Fellow

Table 8. *Avoiding Litigation Through Employee Ownership Culture*. **Theodore M. Becker**, DrinkerBiddle, J.D., Northwestern University School of Law; Doctorate in sociology, Northwestern University

Table 9. *Using U.S. Census Data to Study and Map the Characteristics of the Location of Employee-owned Firms*. **John Guzek**, Rutgers Research Fellow, Rutgers University, School of Management and Labor Relations; Program Manager, Business Education and Legal Services, Department of Small Business Services, City of New York, Office of Mayor Bill DeBlasio; BA degree in economics, University of North Carolina at Chapel Hill

JUNE 27, TUESDAY

SESSION NINE – 2:00pm – 3:00pm

Location: Cuvier Club, Main Room

Keynote: The Invisibility of Capital Ownership as a Source of Wealth: The Work of Louis O. Kelso

Co-Chairs: Adrienne Eaton, Professor and Associate Dean, Labor Studies and Employment Relations, Rutgers University, School of Management and Labor Relations; Doctorate in industrial relations from the University of Wisconsin

John Menke, Menke and Associates; Sponsor of the Louis O. Kelso Traveling Fellowships and the Workshop in honor of Louis O. Kelso through the Employee Ownership Foundation, Rutgers University, School of Management and Labor Relations

Speaker: Patricia Kelso, President, The Kelso Institute

Note: A selection of Louis O. Kelso's work and Patricia's Kelso's books are available at: <http://kelsoinstitute.org/louiskelso/> The most recent book, *Democracy and Economic Power*, is available on Amazon Kindle.

Open questions.

SCHEDULE FOR JUNE 27, TUESDAY

JUNE 27, TUESDAY

Break – 3:00pm – 3:30pm

Location: Cuvier Club, Entrance Area

JUNE 27, TUESDAY

SESSION TEN – 3:30pm – 5:00pm

Location: Cuvier Club, Main Room

A Panel of ESOP Companies: Designing a Conscious Capitalism

Co-Chairs: **Nancy Kurland**, 2017-2018 Kevin Ruble Fellow in Conscious Capitalism, Rutgers University School of Management and Labor Relations; Associate Professor, Department of Business, Organization, and Society, Franklin & Marshall College; Doctorate in business, government, and society and organizational behavior from the J.M. Katz School of Business, University of Pittsburgh

Kevin Ruble, Sponsor of the Kevin Ruble Fellowships in Conscious Capitalism; Rutgers University School of Management and Labor Relations

Panelists:

EA Engineering, Science, and Technology, Inc.

Ian MacFarlane, President and Chief Executive Officer

<http://www.eaest.com>

http://www.eaest.com/employee_ownership.php

http://www.eaest.com/message_from_our_president.php

Ganahl Lumber Company

John Ganahl, Chief Financial Officer

<http://www.ganahlumber.com/>

HDR

Darryl J. Shoemaker, Ph.D., Group President

<http://www.hdrinc.com/>

<http://www.hdrinc.com/about-hdr/history>

<http://www.hdrinc.com/about-hdr/corporate-responsibility/engineers-without-borders>

SCHEDULE FOR JUNE 27, TUESDAY

Discussants:

Discussants will ask questions of the presenters after each presentation and make separate remarks.

Nancy Wiefek, Robert W. Edwards Fellowship for Advanced Study of Employee Stock Ownership, Rutgers University School of Management and Labor Relations; Research Project Director, National Center for Employee Ownership; Doctorate in political science from Pennsylvania State University, 5 minutes

Theodore Becker, Drinker Biddle & Reath LLP; J.D., Northwestern University School of Law; Doctorate in sociology from Northwestern University, 5 minutes

Presentation:

Presentation of the 2017-2018 Kevin Ruble Fellowship in Conscious Capitalism by Kevin Ruble to Professor Nancy Kurland

JUNE 27, TUESDAY

CONCURRENT SESSION

3:30pm – 5:00pm

Location: Cuvier Club, North Atrium

Available for meetings.

JUNE 27, TUESDAY

CONCURRENT SESSION

3:30pm – 5:00pm

Location: Cuvier Club, South Atrium

Available for meetings.

SCHEDULE FOR JUNE 27, TUESDAY

JUNE 27, TUESDAY

SESSION ELEVEN: 5:00 pm – 6:00pm

Mentoring Meetings

Please meet with fellows who have requested mentoring on their research projects that are now underway. Faculty Mentors and other fellows are requested to divide themselves among the sessions. Mentors will gather around a table with one research scholar. Two rooms are available for mentoring.

Location 1: Cuvier Club, Main Room

Jessica Bonanno, Rutgers Research Fellow, Rutgers University, School of Management and Labor Relations; Chief Financial Officer and Director of Employee Ownership Programs, The Democracy Collaborative (Washington, D.C. think tank). Education: M.B.A. The University of Notre Dame, M.B.A. Fellow and Forte Foundation Fellow. *Research Topic: Impact Investing: The Role of Asset Managers, Asset Investors, and Private Equity in the Development of Employee Ownership*

David Calnitzky, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Department of Sociology, University of Wisconsin. *Research Topic: The Labor Market and Its Alternatives: Investigating Manitoba's Mincome Experiment"*

Evan Caspar-Futterman, Rutgers Research Fellowship, Rutgers University School of Management and Labor Relations; Ph.D. candidate, Urban Planning and Public Policy, Rutgers University, Bloustein School of Urban Planning and Public Policy, *Research Topic: Economic Democracy and the Political Economy of Scale*

Ellora Derenoncourt, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Harvard University, Department of Economics. *Research Topic: The Effects of Differential Levels of Employee Ownership Benefits on Employee Satisfaction and Quit Rates*

Joo Hoo Han, Louis O. Kelso Fellow and Morgan Stanley Fellow, and Assistant Professor, Department of Human Resource Management, Rutgers University, School of Management and Labor Relations; Doctorate in organizational behavior and human resources, University of Maryland. *Research Topic: The Micro-Foundations of the Effects of Employee Stock Ownership Plans: Focusing on Employee Perceptions of Empowerment, Fairness, and Identity*

SCHEDULE FOR JUNE 27, TUESDAY

Saehee Kang, Corey Rosen Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations. *Research Topic: Does Employee Stock Ownership Work across Cultures?*

Location 2: Cuvier Club, North Atrium

Jung ook Kim, Research Assistant, Rutgers-W.K. Kellogg Foundation Research Project on Employee Ownership; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations. *Research Topic: Does Participation in a Workplace Spill Over into Political Participation? A Perspective on the Role of Shared Capitalism*

Andrzej Baranski Madrigal, Corey Rosen Fellow, Rutgers University, School of Management and Labor Relations, Assistant Professor, Maastricht University-The Netherlands; Doctorate in economics from Ohio State University. *Research Topic: An Experimental Design to Test Pre-distributive Bargaining Related to Employee Ownership and Profit Sharing*

Christos Makridis, Fidelity Investments Fellow in Equity Compensation, Rutgers University School of Management and Labor Relations; Ph.D. candidate, Stanford University, Department of Management Science and Engineering. *Research Topic: The Cross-section of Non-wage Amenities: Who Uses Them and Why?*

Location 3: Cuvier Club, South Atrium

Cristina Perez, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Visiting Research Fellow, Harvard University; Ph.D. candidate in Literary Studies, Universidad Complutense de Madrid. Madrid, Spain. *Research Topic: Employee Ownership in Popular Culture*

Laura Hanson Schlachter, Rutgers Research Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Sociology, University of Wisconsin at Madison. *Research Topic: Sociology of Worker Cooperatives Using New Survey Data*

Dan Weltmann, Louis O. Kelso Fellow, Rutgers University, School of Management and Labor Relations; Ph.D. candidate, Industrial Relations and Human Resources, Rutgers University, School of Management and Labor Relations. *Research Topic: Does Employee Stock Ownership Moderate the Outcomes of Pay Dispersion?*

SCHEDULE FOR JUNE 27, TUESDAY

JUNE 27, TUESDAY

Reception – 6:30pm – 7:30pm

Location: Cuvier Club, Main Room

JUNE 27, TUESDAY

Dinner – 7:30pm

Location: Cuvier Club, Main Room

JUNE 27, TUESDAY

Film, *Enterprising Owners*– 8:30pm

Mary Ann Beyster, President, Foundation for Enterprise Development; MA from the MIT Sloan School of Management

Location: Cuvier Club, Main Room

New Fellowship Awards – 8:45pm

James Hayton, Dean and Distinguished Professor, Rutgers University School of Management and Labor Relations; Doctorate in human resource management from the W.T. Beebe Institute of Personnel and Employment Relations at the Robinson College of Business at Georgia State University

Adrienne Eaton, Associate Dean and Professor, Labor Studies and Employment Relations, Rutgers University, School of Management and Labor Relations; Doctorate in industrial relations from the University of Wisconsin

Evening Ends – 9:30pm

Special Guests at the Beyster Symposium

Dr. Risha Berry, Office of Community Wealth Building, City of Richmond, Virginia

Dr. Tanya Smith Brice, Benedict College, Dean

Dr. Robynn Cox, University of Southern California, Assistant Professor

Dr. Micah Crump, Jackson State University, Associate Professor

Dr. Elsie Harper-Anderson, Virginia Commonwealth University, Assistant Professor

Dr. Julianne Malveaux, Former President, Bennett College

Dr. Tondra Moore, Samford University, Associate Professor

Jeanne Wardford, Program Officer, W.K. Kellogg Foundation

Support for the Beyster Symposium

The Beyster Symposium has been supported through an endowment at Rutgers and a series of annual gifts for the last ten years by Mary Ann Beyster, J. Robert Beyster, the Beyster Family, and the Foundation for Enterprise Development. Other support comes from: the Employee Ownership Foundation, W.K. Kellogg Foundation, Jared Kaplan of McDermott Will and Emery, Paul Millman of Chroma Technologies, Kevin Ruble, and an anonymous donor.

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The Jared Kaplan Prize.

The prize will be awarded to the author of the best research paper submitted for presentation at the conference. Judging is by an anonymous committee of fellows.

Important Telephone Numbers and Contacts

Beth Schriefer, Conference Coordinator and Project Coordinator of the Fellowship Program: Rutgers office number: 848-445-4722 before June 18th; Cell phone during the La Jolla event: 609-462-9638; Email: bschriefer@smlr.rutgers.edu

Phone number of the Inn by the Sea, the conference hotel: (858) 459-4461

Phone number of the Cuvier Club, the conference meeting site: (858) 367-7748

Joseph Blasi: Director: Cell Phone during La Jolla event: 609-240-4657; Email: blasi@smlr.rutgers.edu

Douglas Kruse, Associate Director. Cell phone during La Jolla event: 908-616-7841
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In Appreciation

The workshop was managed by Beth Schriefer, project coordinator of the Fellowship Program at Rutgers School of Management and Labor Relations (SMLR) and conference coordinator of both the Beyster Symposium and the Mid-Year Fellows Workshop in honor of Louis O. Kelso. Beth's efficiency, kindness, grace, and attention to every aspect of this conference and the entire Fellowship Program throughout the year is deeply appreciated. We would like to thank the following individuals for their assistance: the SMLR staff, especially Laura Hart for managing our accounts; Julia Colvin, Khaleef Crumbley, Janice DiLella, Linda Post, Divine Tabios, Renée Walker, and Ellen Weber, Dean James Hayton, Associate Dean Adrienne Eaton, Associate Dean Elaine Kovac Stroud, and Press Officer Steve Flamisch.

Rutgers University School of Management and Labor Relations

The School of Management and Labor Relations (SMLR) at Rutgers, The State University of New Jersey is the leading source of expertise on the world of work, building effective and sustainable organizations, and the changing employment relationship. The school is comprised of two departments—one focused on all aspects of strategic human resource management and the other dedicated to the social science specialties related to labor studies and employment relations. In addition, SMLR provides many continuing education and certificate programs taught by world-class researchers and expert practitioners. For more information, visit smlr.rutgers.edu

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