

# WALES EMPLOYEE OWNERSHIP CONFERENCE

Thursday, 1st May 2025 | 09:00 - 17:00  
Cardiff City Stadium

#walesEOconference

AZETS



Brewin  
Dolphin

geldards

thomas carroll



## Conference Programme

**09:00 - 09:45**    **Registration & Networking**

**09:45 - 09:50**    **Welcome**

**09:50 - 10:05**    **Employee Ownership in Wales**  
**Welsh Government**

Welsh Government will set out their aims for Employee Ownership in Wales and their continued support for Employee Ownership to drive the growth of the sector.

**10:05 - 11:00**    **Plenary Session 1: Our Journey to EO**  
**Rhys Thomas, Chief Executive, Thomas Carroll Group**

Rhys will discuss their reason for choosing Employee Ownership and how the transition to Employee Ownership has impacted their business. He will also explain how being employee owned enables them to support the business needs of other employee owned businesses.

**11:00 - 11:30**    **Coffee & Networking**

**11:30 - 12:30**    **Breakout Sessions 1**

**Introduction to EOTs (for companies thinking about EO)**

**Professor Paul Cantrill & Branwen Ellis, Cwmpas**

Paul and Branwen will set out the benefits of Employee Ownership, the procedure for a successful transition and how Cwmpas can support companies throughout the transition process.

**What about you? How to manage your wealth before, during and after your sale**

**Greg Tait, Assistant Director, RBC Brewin Dolphin**

Greg will discuss how RBC Brewin Dolphin can assist former owners manage their sale proceeds.

**Employment Law Update**

**Lowri Phillips & Helen Snow, Partners, Geldards**

Lowri and Helen will outline the changes to Employment Law as a result of the new Employments Rights Bill and what companies need to consider in order to comply with the changes.

**12:30 - 13:30**    **Lunch & Networking**

### **13:30 - 14:15 Plenary Session 2: Good governance: What you should consider?**

**Sue Lawrence, Founder, Independent Directors & Trustees**

Sue will cover what is required for good governance of EOTs and the inter action between the EOT trustee and the trading company management team to enable a successful operation of the business.

### **14:15 - 15:00 Plenary Session 3: Employee Engagement**

**Jeremy Gadd, Founder, Telos - JGA**

Jeremy will discuss what is meant by employee engagement and outline how companies can introduce best practice into their employee engagement both before and after their transition to Employee Ownership.

### **15:00 - 15:120 Break**

### **15:20 - 16:10 Breakout Sessions 2**

#### **What would I do differently during the transition**

**Kerry McDonald, Chief Executive Officer, Orchard Media & Events Group**

Kerry will discuss his experience of leading the transition of Orchard Media & Events Group to Employee Ownership and what he would do differently so that companied considering Employee Ownership do not make the same mistakes.

#### **Valuation and Financial Issues**

**Ritchie Tout, Partner, Azets**

Ritchie will examine matters to consider in valuing your business for all stakeholders in light of the new changes for trustees to ensure that they pay the right price for the shares.

#### **Receiving an offer for the EOT: what should trustees consider**

**Debra Martin, Partner, Geldards**

Debra will discuss what trustees need to consider if an offer is received for the business including: the decision making process, who needs to be consulted and the requirements to satisfy trustee duties.

### **16:15 - 16:45 Panel Discussion & Q&A**

An expert panel will discuss their experience of Employee Ownership and answer questions from the delegates.

### **16:45 - 17:00 Employee Ownership in a UK context**

**Oliver Smith, Deputy Chief Executive, Employee Ownership Association**

Oliver will outline Employee Ownership in the UK and how the eoa can support employee owned businesses in Wales.

### **17:00 Close & Networking**