



Merage Institute

US-Israel Innovation Bridge
Executive Leadership Program

2012

October 21 – November 2

Welcome from the Merage Institute CEO and Executive Director

Dear Participants,

I would like to welcome you to the US-Israel Innovation Bridge Executive Leadership Program for the Israeli executives.. Over the past years we have had the privilege and honor of sharing this program with more than 300 Israeli executives who have become Merage fellows.

For me and my family this has been a wonderful and rewarding experience. We have met some of Israel's best and brightest and have established warm friendships with many. But the most rewarding to us has been the response we have received from the executives who have, in many cases, found the two weeks they have spent here "a life changing experience."

We have now further enhanced this program based on comments and observation of the previous fellows. It has been carefully and painstakingly constructed to provide you with real life, practical tools to enhance your strategic understanding of the American market.

I am personally looking forward to meeting you in the coming weeks and welcoming you to the program and to our home.

Paul Merage



CEO and Executive Director
Merage Institute

Dear Participant:

On behalf of Katherine, Paul, and Lilly Merage I am pleased to send you the schedule for the Merage Institute's Business Leadership Training Program, which will take place **Oct. 21 through Nov. 2, 2012** in Irvine, California.

The faculty is amongst the best in the United States. You will train with top business school professors, respected CEOs, and leading practitioners. You will also have the opportunity to learn from business experiences of community leaders over evening dinners.

You will find all the pre-reading material and other useful information at the Merage Institute's Website: www.merageinstitute.org. We have planned some leisure activities for you, but your schedule will be intense during both weeks. The schedule below is divided into carefully integrated Modules ranging from general marketing to business development principles and strategies applicable to the US market. All sessions will take place at the Fairmont Hotel conference room. Evenings will be informal. Dinners will be generally hosted in private homes, and will be followed by discussions with top leaders in the community.

Throughout the program you will be staying at the **Fairmont Hotel** 4500 MacArthur Boulevard, Newport Beach, California 92660. Phone: (949) 476-2001. Please be sure to arrive in time for an informal gathering and dinner being held on Sunday evening, **Oct. 21** at 18:30, where we will meet in the lobby of the hotel.

All daytime sessions will be held at Fairmont Hotel. Dress for days and evenings will be informal or casual. Pack work-out clothes if you desire to exercise. It could get cool, particularly at night, so bring a light jacket or sweater. Please let us know in advance if you require special dietary meals. Breakfast during the week will be at 7am in a separate room set up for us. Morning sessions will start promptly at 8am. *Most evenings we will meet directly outside the hotel.* Vans will pick us up and take us to dinner and evening sessions. Pick up times will be promptly at 6:30 p.m.

If you have any further questions about the program, please feel free to contact us:
Yishay Aizik (yaizik@merageinstitute.org) Israel: 03-7229878 California: 949-7017576
or Kristie Eidlhuber (KEidlhuber@merageinstitute.org).

We look forward to your visit.
Sincerely,

Yishay Aizik,
Director Merage Institute,
US-Israel Innovation Bridge

Week One: October 21 - 27

	Morning	Afternoon	Evening
Sun 21	Arriving to Irvine checking in at the Fairmont Hotel		6:30pm Welcome Dinner at Il Fornaio with Paul Merage and Faculty 18051 Von Karman Avenue Irvine, CA
	Breakfast: HOTEL	Lunch: HOTEL	
Mon 22	8:00am-12:00 pm Marketing Imran Currim	1:00pm-5:00pm Marketing - continued Imran Currim	7:00pm Welcome Dinner hosted by Paul and Lilly Merage Presentation: Paul Merage
	Breakfast: HOTEL	Lunch: HOTEL	
Tues 23	8:00am-12:00 pm Marketing - continued Imran Currim	1:00pm-5:00pm Presentation Skills & Elevator Pitch Joel Calvo	7:00pm Dinner hosted by Holly and Andrew Lerner Presentation: Dean Andy Policano
	Breakfast: HOTEL	Lunch: HOTEL	
Wed 24	8:00am-12:00 pm Business Strategy Margarethe F. Wiersema	1:00pm-5:00pm Business Strategy – continued Margarethe F. Wiersema	5:30p -6:30p Dinner at the Hotel 7:00pm – 10:00pm Presentation Skills & Elevator Pitch – continued Joel Calvo
	Breakfast: HOTEL	Lunch: HOTEL	
Thurs 25	8:00am-12:00 pm Business Strategy continued Margarethe F. Wiersema	1:00pm-5:00pm Operating in the US - cleantech Alex Kaplun	7:00pm Dinner hosted by Liz Merage Presentation: Sarah Backhouse
	Breakfast: HOTEL	Lunch: HOTEL	
Fri 26	8:00am-12:00 pm Strategic networking Bruce Money	1:00pm-5:00pm Strategic networking – continued Bruce Money	7:00pm Dinner LA networking event – Marvin Markowitz Presentation: Jacob Segal The Mark, 9320 W. Pico Blvd., LA
Sat 27	<i>Rest or free time for shopping/sightseeing/ exercise</i>		15:00 pm – 20:00pm <i>Beach Party hosted by</i> <i>Eyal and Yael Aronoff</i> Presentation: Eyal Aronoff

Week Two: Oct. 28 – Nov. 2

	Morning	Afternoon	Evening
Sun 28	9:30am – 10:30am	Rest or free time for shopping/sightseeing/ exercise	4:00pm-21:00pm Dinner and Networking Event Lily Barkhordarian/Katherine Kahan
	Breakfast: HOTEL	Lunch: HOTEL	
Mon 29	8:00am-12:00 pm Negotiation Lisa Baron	1:00pm-5:00pm Negotiation - continued Lisa Baron	7:00pm Dinner hosted by Molly and Israel Weinberg Presentation: Bob Foster-Mayor of Long Beach
	Breakfast: HOTEL	Lunch: HOTEL	
Tues 30	8:00am-12:00 pm Focus – clean tech Hank Habicht	12:00p-12:55p Lunch with Michal Miasnik, BIRD Foundation	1:00pm—5:00pm Critical Thinking & Decision Making Tom Eppel
	Breakfast: HOTEL	Lunch: HOTEL	7:00pm Dinner hosted by Katherine Merae Presentation: Lisa Varga - winner Cleantech Company of the Year Award
Wed 31	8:00a-10:00a Funding Opportunities Mike Hammons	1000am-1200pm raising capital for clean tech - investment banking Brian Kremer	1:00p3:00p Do and don't Lessons learned Kevin Maloney
	Breakfast: HOTEL	Lunch: HOTEL	3:00p5:00p Energy - How to reduce tendency Marshall Kaplan
Thurs 1	8:00am-12:00 pm Winning Consistently in The Cleantech Space Alan Sellers	1:00pm-5:00pm Branding Sasha Strauss	7:00pm Graduation and Farewell Dinner hosted by Katherine Merae, Paul Lilly Merae the Ritz Rest.
	Breakfast: HOTEL	Lunch HOTEL	
Fri 2	9:00am-11:00am Octane	1:00pm-2:30pm Visit @ local company - Taylor Honrath	6.00pm – 0930pm University Synagogue - THE END -

Module Details

MODULE: Marketing, Sales and Distribution

Dr. Imran Currim

<http://web.gsm.uci.edu/~currim/>

Monday, October 22: 8:00-12:00 and 1:00-5:00

Tuesday, October 23: 8:00-12:00

Marketing Strategy

This Module will help Israeli business people understand and develop alternative marketing strategies for U.S. markets. We will focus on organic growth, when companies grow through existing or new products or services in existing or new markets. Discussions will cover securing new markets through expanding geographically and targeting new segments (or customers). Learning is facilitated through a combination of readings, case discussions, and an assignment.

Text, Articles, and Cases

1. An Export Marketing Plan for Small Companies, *International Trade FORUM*, 2, 1995.
2. Strategic Market Management, by David A. Aaker (Dec 30, 2009).
3. "What High Tech Managers Need to Know About Brands," *Harvard Business Review*, July August 1999.
- *4. Biopure, *Harvard Business School Case* 9-598-150.
- *5. Nanosolar Inc. *Harvard Business School Case* 5-510-111

*I hope you can read items 4 and 5 before my Monday-Tuesday session and briefly write your thoughts on each of the questions on the case (see below). This is important for the group discussion. Items 3, 4, and 5 can be ordered from www.hbsp.com (Harvard Business School Publishing).

While it is preferable that other items are read before the two-day session, it is not necessary. However I recommend these items (particularly item 2) be read after you return to Israel. You may be able to find Item 2 (a paperback) in Israel at a lower price.

Alternatively it can be ordered from www.amazon.com although they may take some time to ship your order. Our discussion will focus on how the concepts in the book are being used, have been used, and can be used in specific company settings.

Monday, October 22

8.00 – 12.00 Introduction, Alternative Growth Strategies, Honda Motor Car Company

12.00 – 1.00 Lunch

1.00 – 2.30 Biopure

1. How do you assess Biopure's potential in the human market? The animal market?
2. What are the biggest obstacles to Biopure's success in the human market? The animal market?
3. How might Oxyglobin be a threat to Hemopure? How might it be an asset to Hemopure?
4. What should Biopure do regarding the commercial release of Oxyglobin? If they release, what price should they set? How should it be distributed?

2.45 -5.00 Nanosolar Inc.

1. What is the value proposition of Nanosolar's thin film solar technology? For which type of customer is the product best suited? With which competitor should Nanosolar be most concerned?
2. Is Nanosolar well positioned to participate in the growth of the worldwide solar market? Do you agree with the management team that no first mover advantage exists in this market? If you disagree how would you capture an advantage?
3. Compare the government incentives offered in Europe with the incentives in the US. How would Nanosolar take these incentives into consideration when formulating its market entry strategy?
4. How should Nanosolar's cost advantage affect their pricing and customer selection strategies?
5. What should Roscheisen do? Why? What keeps him up at night about your strategy?

Tuesday, October 23

8.00 – 12.00 Customization of Marketing Strategies and Group Discussion

8:00 – 8:15 We will make a list of Israeli products or services for export. The participants will be divided into groups. Each group will select a product or service offered by a group member firm for export.

8:15 – 10.00 Dr. Currim will lead a brainstorming session on key questions and methodology for development of export plan

10.00 – 11.00 Group Develops Marketing Strategy for Israeli Exports to the U.S.
Each group will come up with:

- (a) key questions to be answered in order to judge the export potential of the product or service, to be summarized on 1-2 transparencies, and
- (b) an outline of a process or methodology for answering the key questions, to be summarized on 1-2 transparencies.

11:15 – 12:00 Group Presentations and Discussion

Each group will present the output of the 9.45-10.45 session, followed by a discussion on how the questions and methodology can be enhanced (15-20 minutes per group)

MODULE: Presentation Skills and Elevator Pitch

Joel Calvo

Module Description:

Creating Your Elevator Pitch:

An elevator speech is an elevator statement that is indispensable tool for promoting you and your business. It is as essential as your business card. What is an elevator speech? Simply put, it is a concise, carefully planned, and well-practiced description about you and your company that your mother should be able to understand in the time it would take to ride up an elevator. In this session you will learn to write and present your personalized Elevator Speech.

MODULE: Business Strategy

Margarethe F. Wiersema

Module Description:

The business strategy Module is designed to help managers build capabilities for strategic analysis and decision-making. The goal is to broaden your perspective and develop strategic thinking capabilities to make your organization more competitive.

The approach of the course is practical and problem-oriented. It distills and applies the latest strategic insights and approaches to assessing competition in an industry and evaluating competitive strategy. Frameworks will be introduced by which to assess a firm's resources and how to leverage those resources to form the basis for a sustainable competitive advantage in the marketplace. By applying these strategic concepts and frameworks to your own company and industry, you will gain a strategic understanding of the challenges and opportunities your organization faces. This Module will provide you with the knowledge to improve decision making in a competitive and dynamic environment.

Wednesday, October 24th 8:00 – 12:00

The Concept of Strategy

Provide introduction to Strategy Module. Introduce participants to key strategic concepts and frameworks. Foster strategic level awareness that forces participants to go beyond specific operational issues. Discuss what defines a strategy and the process of formulating a company strategy. Introduce the business model concept and business model analysis to make explicit the key assumptions underlying a firm's profit-making logic. Analyze and understand the value propositions behind the firm's business model.

Readings:

Porter, M. E. (1996). "What Is Strategy?" *Harvard Business Review*, HBR OnPoint Enhanced Edition # 4134

Kim, W. C. & Mauborgne, R. (2004). "Blue Ocean Strategy." *Harvard Business Review*, Reprint # R0140D

Johnson, M.W., Christensen, C.M., & Kagermann, H. (2008) "Reinventing Your Business Model." *Harvard Business Review*, Reprint # R0812C

Individual Exercise: Assessing your company strategically and identifying the assumptions in your business model

1:00 -5:00 - Industry Structure Analysis

Gain a clearer understanding of how to assess key forces in the marketplace and competitive behavior. Introduce participants to strategic concepts used to analyze the competitive environment. Foster strategic understanding of competitive behavior and the key forces driving evolution of the marketplace. Utilize various industry examples to highlight how competitive forces influence firm strategic behavior. By understanding the forces driving competition in the industry, a strategic perspective can be gained on what drives competitive behavior.

Readings:

Porter, Michael (2008). "The Five Competitive Forces that Shape Strategy." *Harvard Business Review*

Group Exercise: Analyze the competitive forces impacting a specific industry

Thursday, October 25th 8:00 – 12:00

Analyzing Resources and Capabilities

Introduce participants to a resource-based perspective for analyzing the strategic capabilities of an organization. We shall discuss how to identify and appraise the resources and capabilities of an organization and in so doing will build the foundations for analyzing the basis for competitive advantage. By evaluating the potential of a firm's resources and capabilities, we can assess the basis for the development of a sustainable competitive advantage.

Readings:

Robert Grant (2010). *Contemporary Strategy Analysis*, 7th edition. Chapter 5: Analyzing Resources and Capabilities

Prahalad, C.K. and Hamel, G. (1990) "The Core Competence of the Corporation", *Harvard Business Review*

Group Exercise: Analyze the resources and competences within your organization

Pre Readings:

Porter, M. E. (1996). "What Is Strategy?" *Harvard Business Review*, HBR OnPoint Enhanced Edition # 4134

Kim, W. C. & Mauborgne, R. (2004). "Blue Ocean Strategy." *Harvard Business Review*, Reprint # R0140D

Johnson, M.W., Christensen, C.M., & Kagermann, H. (2008) "Reinventing Your Business Model." *Harvard Business Review*, Reprint # R0812C

Porter, Michael (2008). "The Five Competitive Forces that Shape Strategy." *Harvard Business Review*

Robert Grant (2010). *Contemporary Strategy Analysis*, 7th edition. Chapter 5: Analyzing Resources and Capabilities

Prahalad, C.K. and Hamel, G. (1990) "The Core Competence of the Corporation", *Harvard Business Review*

MODULE: Legal challenges

Alex Kaplun, Esq.

Thursday, Oct 25: 1pm-5pm

Module Description:

Our discussion will focus on practical legal issues you are likely to encounter doing business in the U.S., with the goal of providing a business and commercial framework to analyze and understand those issues.

We will discuss the different forms of legal entities that operate under U.S. law. We will look at the key elements and structure of convertible debt investments and venture capital investments, and discuss the most-often used intellectual property arrangements, such as non-disclosure covenants and “work for hire” technology agreements. We will also review critical issues relating to management compensation, and – time permitting – analyze a traditional U.S. private equity buy-out transaction.

Selected Readings

- Convertible Debt Term Sheet
- Series A Convertible Preferred Stock Term Sheet
- NDA
- Proprietary Information and Inventions Assignment Agreements
- Change in Control Bonus Plan

MODULE: Strategic Networking

Bruce Money

Module Description:

This Module focuses on networking in a strategic sense; that is, how to form and utilize connections with people for successful entry and growth. As the saying goes, it’s not *what* you know, it’s *who* you know. When it comes to networks, it’s sometimes *how* you know them as well. In the vast market of the U.S., learning the strategic aspects of forming the right kinds of relationships is important to success of Israeli ventures in America. Through case studies, simulations, and other examples, we review and explore the frameworks that govern how action-oriented networks are formed and maintained. Participants will analyze various types of networks and their relevance to Israelis (e.g., product- or service-oriented, community, Jewish leaders, professional, etc.). You will also identify and discuss strategies relevant to Israeli business operating in U.S. regarding creating and sustaining networks. Learning how networks operate demonstrates that, as in many areas of business, advantage may not go to the one with the most resources, but rather to the one who knows what’s going on.

A few pre-readings and a case for this course will be sent to you by the Merage Foundation. Dr. Money will give you other articles at the seminar.

Pre-Readings *(Please read before the Module begins.)*

“How Leaders Create and Use Networks,” by H. Ibarra and M. Hunter, *Harvard Business Review*, January 2007.

“A Blueprint for Constructing a Personal and Professional Network,” by T. Krattenmaker, *Harvard Management Communication Newsletter*, April 2002, Harvard Business School Publishing.

“Heidi Roizen,” Harvard Business School Case 9-800-228, by Nicole Tempest, 2000, Harvard Business School Publishing. This is a case study about a successful venture capitalist in Silicon Valley who is a very active networker *Please read through the case and prepare to discuss the following questions:*

1. What are the strengths of Roizen’s network as we see it at the end of the case. The weaknesses?
2. What specific steps did Roizen take to develop her network? To maintain it?
3. What strategic lessons can you apply from Roizen’s experience to your own networking efforts for marketing, financing and other help?

Seminar Outline

8:00-12:00 The Nature of Networking Concepts

- The “small world” phenomenon
- Networking vocabulary
- Strong vs. weak ties
- The power of “structural holes”

Networking Tools

- Types of networks
- Building and managing your network
- Currencies of network exchange (the right kind of reciprocity)
- Avoiding the “top dog” syndrome

Networking Vehicles

- Wider-scope networks (community, government, etc.)
- Cross-cultural networking considerations
- Specific networking help for Israeli companies in the U.S.
- Strategic blogging

1:00-5:00 Putting Networks to Work for Your Business

- Industry examples of how networks have assisted businesses in U.S.
- Harvard and other case study examples from Israel companies
- Hypothetical mini-cases for networking strategies in various business stages of start-up, growth, etc.

Presenting Your Own Strategic Networking Plan

Based on course learning tools, participants will formulate and present briefly (seven minutes or so) a strategic networking plan for preferably an actual business for a specific business need or situation (marketing, capital, etc.). Questions to be considered include:

1. Who are the types of people you eventually need to contact?
2. Through what strategic network will you contact them?
3. What will you specifically do to make contact and follow up?

As a class we will listen to the plans, provide feedback, etc.

Other Readings

Business Press/Newspaper Articles (these and others to be distributed in class)

“The Real Way to Build a Network,” *Fortune*, February 6, 2012.

“The Power of Networks,” special issue of *Forbes*, May 7, 2007 (selected articles)

“How to Network—And Enjoy It,” *Fortune*, April 4, 2005

“Passengers Are Cleared to Network about the Cabin,” *New York Times*, September 14, 2004.

“Bridging the Gap,” *Entrepreneur*, November, 2004.

“The Fine Art of Following Up,” *Business Week*, October 21, 2002.

Academic Articles (for perusal only—to be sent electronically during in class)

“Using Social Media in the B2B Context,” Darden Business Publishing, July 27, 2009.

“Making Invisible Work Visible: Using Social Network Analysis to Support Strategic Collaboration,” by R. Cross, S. Borgatti, and A. Parker, *California Management Review*, Winter 2002.

“Explorations of National Culture and Word-of-Mouth Referral Behavior in the Purchase of Industrial Services in the United States and Japan,” by B. Money, M. Gilly and J. Graham, *Journal of Marketing*, October 1998.

Other Harvard/Stanford Readings (Recommended for further reading—can be ordered online from HBS Publishing website, www.hbsp.com)

“How French Innovators are Putting the ‘Social’ Back into Social Networking,” by Larry Kramer, *Harvard Business Review*, October 2012.

“A Smarter Way to Network,” by Rob Cross and Robert Thomas, *Harvard Business Review*, July-August 2011.

“A Practical Guide to Social Networks,” by Rob Cross, Jeanne Liedtka, and Leigh Weiss, *Harvard Business Review*, March 2005.

“Discovery Skill #4: Networking-How Interacting with People Outside Your Social and Professional Spheres Can Jump-Start Innovation” by Jeffrey H. Dyer, Hal B. Gregersen, Clayton M. Christensen, 2011, in *The Innovator’s DNA*, Harvard Business School Publishing.

“A Note on Social Networks and Network Structure” by Jeffrey Pfeffer, 2008, Stanford Business School, available from Harvard Business School Publishing.

“How to Build Your Network” by Brian Uzzi and Shannon Dunlap, *Harvard Business Review*, December 2005, Harvard Business School Publishing.

“Are You Ready to Get Serious About Networking?” by S. Parker, *Harvard Management Communication Newsletter*, February 2003, Harvard Business School Publishing.

“The Science of Networking,” by L. Gary, *Harvard Management Update*, January 2004, Harvard Business School Publishing.

“Note on Industry Peer Networks,” by S. Sgourev, 2002, Stanford Business School, available from Harvard Business School Publishing.

“Can a Shy Person Learn to Network?” by H. Ibarra, *Harvard Management Update*, September 1996, Harvard Business School Publishing.

Books on Networking (Recommended for further reading—can be ordered online at www.amazon.com or from other booksellers)

Smart Networking, by Liz Lynch, 2009, McGraw Hill, ISBN: 9780071602945.

The Hidden Power of Social Networks, by R. Cross and A. Parker, 2004, Harvard Business School Press, ISBN: 159139270.

Power Networking, 2nd Edition, by D. Fisher, S. Vilas, 2000, Bard Press, ISBN: 1885167474.

Hidden Assets: Harnessing the Power of Informal Networks, by C. Ehin, 2004, Springer-Verlag Telos, ISBN: 1402080816.

MODULE: Negotiations

Lisa A. Barron, Ph.D., MBA

Module Description:

The purpose of this Module is to provide opportunities for participants to develop their negotiating abilities for use in organizational and other settings. The Module is premised on the assumption that negotiating concepts are best learned through practice grounded in rigorous analysis and reflection. Theoretical principles and concepts from various reference disciplines (such as social psychology, sociology, and economics) will be presented through lectures and readings, with the focus primarily on improving practical skills through participation in simulations. Participants will not only learn to enhance their individual abilities in dyadic and group situations, but also to analyze contexts for the most effective application of these skills.

Negotiation Curriculum:

1. What is negotiation?
2. What is a negotiation issue?
3. Distributive vs. Integrative Negotiations
4. Interests and Positions
 - explanation
 - exercises (these will involve generic situations)
 - wide application of interest and position concepts

5. Additional negotiation concepts
 - Negotiation Issues
 - BATNA
 - Target
 - Reservation price
6. How to prepare - introduction to the prep sheet
7. Negotiation simulation
 - prepare in dyads
 - negotiate in dyads (privately)
 - group debrief
8. “Informal” negotiations – how to use concepts in situations that don’t necessarily present as negotiations
9. Advanced techniques for multiple-issue negotiations
10. Questions, review, wrap-up

MODULE: Critical Thinking & Decision Making

Thomas Eppel

Wednesday, March 14: 8:00am-11:45am

Module Description:

Sound decision making and critical thinking have always been important skills for creating success. In a world that has become increasingly complex and that is changing at an ever increasing pace, these skills are even more important than ever before. Yet, too many individuals and organizations are ill prepared when it comes to making smart decisions and how to critically examine the abundance of data and information that is all around us.

This Module gives an overview of the art and science of decision making and critical thinking. It provides the motivation to view decision situations as opportunities rather than problems and to view decision making as a skill that can be learned, practiced and improved upon like any other skill. It also discusses the many pitfalls and psychological biases that have a tremendous impact on our thinking and decision making and have led to new fields such as behavioral economics and behavioral finance.

Selected Readings:

Book: Smart Choices, A Practical Guide to Making Better Life Decisions by John S. Hammond, Ralph L. Keeney and Howard Raiffa.

Module: Winning Consistently in The Cleantech Space

Alan Sellers

Module Description:

A review of tools to enhance the effectiveness of the organization (including The Four C's, and the Five Elements of The People Model of Business). We will review what differentiates The Cleantech Space and gain a practical perspective on what is required to succeed in growing a cleantech company in the United States. This is intended to be a hands-on, participative session in which the members of the class will interact with the presenter and explore how to more effectively conduct business in the United States in the field of water, energy and other environmentally-related technologies.

Module : Branding

Sasha Strauss

Module Description:

A rich introduction to all things branding — from naming and brand architecture to visual design and brand extension. We'll look at why brands matter, who they matter to, how you can build them into your marketing, advertising and public relations strategies. A great start for professional communicators or those simply interested in brand strategy.

Presentations

Paul Merage

Dean Andy Policano

Michal Miasnik BIRD Foundation

Sarah Backhouse

Jacob Segal

Eyal Aronoff

Mayor Bob Foster

Lisa Varga

Professors and Presenters



Sarah Backhouse

host and producer Future360

Sarah Backhouse is currently host and producer of Future360, a syndicated online news show unearthing cutting edge cleantech, greentech and high-tech.

Sarah is a sought after emcee and speaker of sustainability conferences worldwide. She has appeared at the UN's International Renewable Energy Organization Conference, the Women in Green Forum, AQMD's A World We Can Change, the US-Australia Sustainable Cities Dialogue and Arnold Schwarzenegger's Governors' Global Climate Summit. Sarah was honored at the Advance Women's Leadership Summit, held at the Sydney Opera House, as one of Asia Pacific's Leading 50 Women.



Lisa Barron

Title: Senior Lecturer, Negotiations

E-mail: lbarron@uci.edu

Dr. Lisa Barron is a faculty member of Organization and Management at The Paul Merage School of Business, University of California, Irvine. Her teaching interests focus on creativity, negotiation, communication, organizational behavior and leadership. She has taught negotiation and leadership techniques to members of large and small organizations including Microsoft, Medtronic, Ingram Micro, State Street, MicroSemi, and Boeing and to executives, career counselors, undergraduate and graduate students, academic staff and faculty. Her current coaching work focuses on helping executives and doctors become more effective leaders, communicators and problem-solvers.

Lisa's research has been published in the journals *Human Relations*, *Career Development International*, and *Journal of Management Inquiry* and has been written about or recognized in *The Boston Globe*, *The Washington Post*, *The New York Times*, *Glamour*, *The Huffington Post*, and the *Orange County Register*. In addition, she has appeared on radio programs for WBUR, KNX, CBS and NPR.

Lisa's negotiation courses and workshops focus on developing people's ability to better understand their underlying interests and negotiate effectively. Her creativity courses focus on developing

people's ability to think creatively and to use that thinking to solve problems. She also coaches executives and doctors regarding development of their leadership abilities.

Lisa has taught graduate and undergraduate courses in organizational behavior and negotiation at Pepperdine University, The Claremont Graduate School and The Paul Merage School of Business at University of California, Irvine and Executive Education at UCLA and UCI. She has taught negotiation workshops at UCLA, CalTech, UCI, the Keck Graduate School and Utah State University.

Lisa has received sixteen teaching awards for her negotiation and her strategic communication courses. In addition to her academic experience, Dr. Barron has worked as an advisor to undergraduates and as a consultant and trainer at the Data Center at Stanford University. She also has experience marketing IT training programs.

Lisa is a member of the Academy of Management, the American Psychological Association, and the Association for Psychological Types. She is also a certified mediator. She has reviewed for leading journals in the fields of Management and Psychology. She received her Ph.D. in Organizational Behavior from The Anderson School at UCLA.

In addition, she has an MBA from The Anderson School at UCLA and a BA in Psychology and English from Stanford University. She loves to travel, cook (and eat), cycle, read, scuba dive, draw, paint and collect handmade earrings and folk art.



Joel Calvo

Title: Chairman and Ceo

Email: joelcalvo@gmail.com

Joel Calvo has been a business and community leader for more than 30 years. He is an accomplished senior executive whose strategies, communication skills and financial acumen have consistently delivered a successful track record of growing company profitability and meeting diverse stakeholder interests in small privately---held to large publicly---held organizations.

Professional highlights include the following:

- Chairman/CEO of WM Financial Services, a national broker/dealer with more than 2,000 brokers;
- Chairman/CEO of WM Advisors, a \$28 billion mutual fund complex;
- Partner of ZAAZ, a full service interactive agency: strategy, design, development, user experience, web analytics, optimization, social networking & search marketing;
- President of PNC Capital Markets, a public finance investment banking firm;
- President of PNC Investments, a multi state retail broker/dealer;

- Director of Sales and Marketing for Bank of America's Global Private Bank;
- President of Main Street Trading, an institutional and retail commodities firm;
- Led and integrated numerous business turnarounds, mergers, acquisitions and divestitures;
- Established strategic partnerships and joint ventures to grow product distribution and optimize capacity; and
- Highly effective communicator, keynote speaker and frequent guest commentator on CNBC, Bloomberg, PBS, FOX and CNN.
- Community highlights include the following:
- Board of Director, Vancouver Economic Commission (British Columbia, Canada);
- Board of Advisor and Executive Committee, University of California (Irvine)



Imran Currim

Title: Chancellor's Professor, Marketing

Email: iscurrim@merage.uci.edu

Personal Website: <http://web.merage.uci.edu/~currim/>

Imran Currim is Chancellor's Professor at the University of California, Irvine, and serves the Paul Merage School of Business as Associate Dean of the Undergraduate Program. Prior to that he served as Associate Dean,

Marketing & Student Relations, for the Executive MBA Programs.

Prior to that, he served as Associate Dean of the Masters Programs. He is the recipient of two of the highest honors in marketing:

- the American Marketing Association William O'Dell Award for "the article judged to have made the most significant five year contribution to marketing theory, methodology, and practice," and
- the American Marketing Association/Houghton Mifflin Distinguished Teaching in Marketing Award, "for contributions to teaching excellence."

Professor Currim's recent papers have been finalists for:

- the 2003 American Marketing Association Paul E. Green Award for best paper published in Journal of Marketing Research during 2002.
- the 2004 European Marketing Academy Award for best paper published in International Journal of Research in Marketing during 2003.

Professor Currim received:

- Wall Street Journal's 2008 Favorite Professor in an Executive MBA Program.
- Business Week 2006 ranked his marketing course taught in the Executive MBA Program #3 in the world.

Professor Currim was recently appointed Chancellor's Professor at UCI, a title used to "recognize full Professors who have demonstrated unusual academic merit and whose continued promise for scholarly achievement makes them of exceptional value to the

university.” He also received one of the highest commendations awarded by the University of California Irvine Academic Senate, the Distinguished Faculty Lectureship Award.

Research

- How customers make choices
- How competitive product and service features, marketing mix variables such as price, sales promotion, advertising, and distribution, and customer variables such as loyalty, choice set effects, and background variables, influence customer choice.
- Published articles on this topic in various journals such as the European Journal of Operations Research, International Journal of Research in Marketing, Inquiry, Journal of Consumer Research, Journal of Marketing, International Journal of Internet Marketing and Advertising, Journal of Marketing Research, Management Science, Marketing Letters, Marketing Science, and Organizational Behavior and Human Decision Processes. Publications are available at <http://web.merage.uci.edu/~currim/publications.htm>
- Served as Area and Associate Editor of Marketing Science, and Management Science for 13 years.
- Currently serves on the editorial boards of the Journal of Marketing Research, International Journal of Research in Marketing, Journal of Interactive Marketing, International Journal of Electronic Business, and International Journal of Internet Marketing and Advertising.

Consulting, Executive Training, and Teaching

- Recognized as an international expert in the area of design and marketing of products and services, and market research.
- Consulted for companies such as Altiris, AT&T, Baxter, Dell, Elcam Medical (Israel), Inabata (U.S. and Japan), Johnson and Johnson, Los Angeles Times, Orange County Register, St. Joseph's Hospital, Twentieth Century Fox, Warner Brothers, and smaller profit and not-for-profit organizations. Conducted executive training programs at companies such as Astro Asia (Thailand), Bioscience Webster, British Petroleum, Children's Hospital of Orange County (CHOC), Conexant, First Auto Works (China), Fluor-Daniel, Ingram-Micro, Microsemi, Merage Foundation Export Program, Orange County Register, Panasonic Avionics, Shinsegae (Korea), and Triage Consulting.
- Received 17 Excellence in Teaching Awards most of which are for his teaching in the Executive and Fully Employed MBA Programs at UCI, New York University, and UCLA.

Education

- PhD (Business) Stanford University
- MS (Statistics) Stanford University
- MBA University of Wisconsin
- BE (Electrical Engineering) VJTI, University of Bombay

Prior Academic Appointments

- Before joining UCI in 1989 he was a member of the business school faculties of UCLA Anderson School of Management, New York University Stern School of Business, and Yale School of Organization and Management



Thomas Eppel

Title: Summer Session Instructor and Assistant Specialist

Email: teppel@uci.edu

Personal Website: <http://www.tomeppel.com>

Born and raised in Germany, Dr. Thomas Eppel came to the United States in 1984 and enrolled in the Ph.D. program of the Psychology Department at the University of Southern California.

After receiving his Ph.D. in Mathematical Psychology with an emphasis on decision analysis, Dr. Eppel joined the faculty of the Krannert Graduate School of Management at Purdue University. In 1996 he returned to California to become Vice President of Decision Insights, Inc., a consulting company specializing in decision and risk analysis.

In January 2000, Dr. Eppel joined the staff at the Graduate School of Management at the University of California Irvine as an Assistant Dean, responsible for curriculum development around the “Information Technology for Management” focus.

He currently lectures at the Paul Merage School of Business, UC Irvine.

Dr. Eppel has published numerous articles, book chapters and reports in the areas of decision and risk analysis. He has been involved in consulting projects with clients such as the U.S. Department of Energy, the California Department of Health Services, EPRI, SANDIA, the Joint Research Centre (Commission of the European Communities), and others.

In addition, Dr. Eppel designed and taught several executive training seminars. He authored a textbook and developed instructional software in statistics and has been widely recognized for his outstanding teaching.

His teaching awards include the R.B. and Mary Stewart Distinguished Teaching Award from the Krannert School of Management at Purdue University and an award for Innovation in Teaching from the University of California at Irvine, as well as several awards given by students.

In 2000, Business Week’s rankings and profiles of MBA programs listed him as one of the two most popular professors at the Graduate School of Management, UC Irvine.



Bob Foster, Mayor Long Beach

Mayor Bob Foster is a widely-respected business and community leader who was elected as the 27th mayor of Long Beach in June, 2006. He was re-elected for a second term in June 2010.

Mayor Foster served as president of Southern California Edison before his retirement in 2006 after more than 20 years with the company. As an Edison executive, Mayor Foster led California's largest electric company through the 1999 energy crisis. During Mayor Foster's tenure, Edison developed the largest renewable, clean energy programs (solar, geothermal, biomass and wind) in the United States.

Mayor Foster began his career in public service as a staffer in the California State Senate and California Energy Commission where he established statewide energy efficiency standards that are still enforced today.

He was appointed as the Environmental Committee chair in 2008, elected to the Advisory Board in 2009 and elected to the Board of Trustees in 2010 for the U.S. Conference of Mayors. Governor Schwarzenegger appointed Mayor Foster to the Board of Governors for the California Independent Systems Operators (ISO) in 2010.

Mayor Foster is a graduate of San Jose State University in public administration. Prior to his election as mayor, he served as a trustee to the California State University system and remains active in a number of community and public policy organizations.

Mayor Foster and his wife, Nancy, have been married for 42 years and have two grown sons and three grandchildren. The Mayor and Mrs. Foster work to support a variety of community organizations.



F. Henry Habicht II

HHabicht@sailcapital.com

Hank joined *SAIL* in January 2006 as a pioneering figure in the areas of environmental business and policy and a leading contributor to environmental innovation. He has been influential in spearheading many of *SAIL*'s portfolio company investments.

Hank and Managing Partner Walter Schindler are responsible for co-managing all aspects of *SAIL*'s operations and investments.

His career as a leading member of the environmental policy world has included leadership positions at the U.S. Department of Justice as Assistant Attorney General in charge of the Environment and Natural Resources Division, and at the U.S. EPA as COO (Deputy Administrator). During his time with the EPA he oversaw the development of new air and water programs to prevent pollution, including the development of the Energy Star program and implementation of market-based trading programs under the 1990 Clean Air Act amendments.

In business, Hank served as Senior VP in charge of acquisitions and other divisions of Safety-Kleen, a billion-dollar environmental service company. He has also held positions and started ventures in the for-profit environmental arena, including VP of William D. Ruckelshaus Associates, which co-managed the successful Environmental Venture Fund, one of the first successful green funds in the 1980s.

As Co-Founder of Capital E, LLC, a strategic consultancy for emerging renewable energy products and technologies, he advised Fortune 100 and early stage ventures on sustainable growth strategies.

He previously served as CEO and is now Vice Chairman of a prestigious non-for-profit corporation that fosters innovation in environmental management and promotes applications of clean technology in emerging markets, called Global Environment & Technology Foundation (GETF.)

Hank has held numerous Board seats over the years, currently he sits on the Boards of SAIL companies WaterHealth International, and Xtreme Power, and is a Co-Founder of the American Council of Renewable Energy. He is a Commissioner of the National Commission on Energy Policy, a member of the Board of Directors of the World Environment Center, and has advised several Cabinet Secretaries.

He is on the Advisory Board to the National Renewable Energy Lab and the Pacific Northwest National Lab. In 1991 the EPA awarded him with the esteemed Total Quality Leadership Award and in 2009 he received the national Richard Mellon Award for Environmental Stewardship. Hank holds a B.A. with High Honors from Princeton University and a J.D. from the University of Virginia.



Michael J. Hammons

Partner- Sail Capital

mhammons@sailcapital.com

Mike infuses nearly 20 years of senior leadership experience into building operational value for SAIL's portfolio companies. He has diverse domestic and international experience across multiple verticals such as telecommunications, energy, automotive, aerospace and defense, data storage, enterprise software, and electronic hardware. His diverse background has spanned the gamut of company life cycles from start-ups to large organizations.

Prior to joining SAIL, he held leadership positions including CEO at Vigilistics, CEO at Nexiant, CEO at ARGO Tracker, VP of Global Operations at Cogent Communication, and Director of the South American Automotive Practice at Ernst & Young Consulting.

Recognized as an expert in supply chain, operations, manufacturing, product development and logistics, Mike has spoken at multiple conferences and written numerous articles.

Mike serves on several boards including the Advisory Board for California Polytechnic State University, San Luis Obispo. He has also received multiple awards throughout his career, including Top 100 Most Innovative Vendors from *Supply and Demand Chain Executive* and Deloitte and Touche Fast 500.

He earned a bachelor's degree in industrial engineering from California Polytechnic State University, San Luis Obispo, and a master's in business administration from Harvard Business School.



Taylor Honrath

Director, Development and Programs

taylor@cleantechoc.org

Taylor Honrath began working in political and government circles at an early age. He has worked on Capitol Hill in Washington DC, and in Sacramento prior to returning to Southern California. Prior to joining CleanTech OC, Taylor served as Mayor Bob Foster's legislative aide in the City of Long Beach.

Taylor's long-time policy interests include the development and advancement of domestic clean technology, particularly sustainable energy, smart-grid build-out, and energy efficiency, among others.



Marshall Kaplan

President Pathways to Opportunities

MKaplan@pathopps.org

Marshall Kaplan was former Dean of the Graduate School of Public Affairs at University of Colorado and directed the Wirth Chair in Energy, Climate Change and Community Development related issues and policies. Before that, he served in the Carter, and Kennedy Administrations and was the principal in the policy advisory firm of Marshall Kaplan, Gans and Kahn.

Mr. Kaplan has advised numerous federal, state, and local governments as well as non-profit groups and businesses on diverse public policy alternatives. He also facilitated consensus of international leaders at Aspen Global Forums focused on issues of economic development, privatization of energy, and financing infrastructure.

Mr. Kaplan came to Orange County in Feb 2004 to lead the Merage Foundations, and recently established the non-profit Pathways to Opportunities with Merage Foundation support. He has written numerous articles as well as several books on urban, economic and social welfare policy. A winner of the ADL Proclaim Liberty Award in Denver, he is a graduate of both MIT and Boston University.



Alexander Kaplun

Partner, Golenbock Eiseman Assor Bell & Peskoe LLP
akaplun@golenbock.com

Mr. Kaplun is an experienced corporate attorney who has represented private equity funds, private and public corporations and limited liability companies, as well as limited partnerships and individuals in a wide range of corporate matters, including in connection with mergers and acquisitions;

public and private equity and debt financings; venture capital financings; private equity and debt financings; cross-border joint ventures and financing; securities offerings; PIPE transactions; and reverse merger transactions.

Representative transactions worked on by Mr. Kaplun include:

- The acquisition of chemical manufacturing facilities in Europe and Latin America.
- Substantial acquisitions for private equity funds of portfolio companies in the media space.
- The disposition of Excelsior Radio Networks, a leading independent network radio company providing sales representation services to over fifty national radio production companies and producing over one hundred different programs.
- The acquisition of several distribution companies throughout the U.S. by a world-leading office equipment manufacturer.
- Joint-ventures between a music and entertainment company and various online music delivery companies.
- The acquisition of a public company manufacturing corn-based ethanol and raising capital by means of Regulation S offering.

Prior Legal Experience

- Sullivan & Cromwell
- Shibolet, Yisraeli, Roberts & Zisman, LLP



Brian Kremer

Director ROTH Capital Partners ([Coverage: Cleantech](#))
bkremer@roth.com

Brian Kremer is a Director in the Cleantech Investment Banking Group. Mr. Kremer joined ROTH in 2007 and previously spent two years as a Senior Research Analyst and two years in investment banking covering the cleantech industry.

Prior to ROTH, Mr. Kremer was an investment banker at Ardour Capital Investments, a boutique firm in New York City where he worked exclusively with companies in the alternative and renewable energy space. Prior to Ardour Capital, Mr. Kremer was a Program Executive for NASA's Project Prometheus, which was developing advanced propulsion and power generation for deep space exploration.

Prior to NASA, Mr. Kremer directed all external affairs activities for a US-led international organization building a \$4.5B nuclear power plant in North Korea. Mr. Kremer began his career at the US Department of Energy, where he worked on technical, policy, and legislative issues related to nuclear and environmental safety and national security and participated on task forces to develop the National Energy Strategy.

Mr. Kremer received his MS in Mechanical Engineering from the University of Texas (summa cum laude). Mr. Kremer is a member of the Board of Directors of CleanTech OC.



Kevin D. Maloney

President & CEO QuantumSphere, Inc.

Mr. Maloney is responsible for QuantumSphere's vision, business strategy, and marketing execution and has helped secure more than \$20 million in funding since the company's 2002 inception. His seasoned investment, business development, and marketing experience has significantly contributed to QuantumSphere's global exposure and innovative business approach over the last ten years.

Prior to co-founding QuantumSphere, Mr. Maloney was vice president of institutional sales and marketing at First American Corp. (NYSE: FAF) working in the Capital Management and Trust Division.

Previously, Mr. Maloney served as principal and compliance officer at Pacific Investment Management Company (PIMCO), an institutional investment advisory firm with over \$1.7 trillion in assets under management.

With a lifelong passion for health and fitness, immediately after college Mr. Maloney co-founded 8Blend®, Ready-to-Blend all natural fruit smoothies, which grew into a leading pre-packaged solution for convenient, healthy, freshly blended beverages, selling more than 10 million units nationally

before getting acquired. Mr. Maloney has raised capital for numerous private equity placements and held NASD Series 7, 26, 63, and 65 securities licenses.

Mr. Maloney is a frequent speaker and panelist at various universities and industry conferences and a member of the American Chemical Society (ACS) and Young President's Organization (YPO). He is also a mentor with Big Brothers Big Sisters of Orange County and an active board member for the Orange County Boy Scouts of America. Mr. Maloney has been awarded several U.S. patents, earned his B.A. from the University of California, Irvine and an M.B.A. from Pepperdine University.



Michal Miasnik,

West Coast Representative, BIRD Foundation

Ms. Michal Miasnik is the West Coast Representative of the BIRD Foundation. BIRD Foundation (www.birdf.com) was established in 1977 by the U.S. and Israeli governments to develop and fund industrial Research & Development partnerships between companies from both countries on a project specific basis. Located in the Silicon Valley, Ms. Miasnik is responsible for initiating business

matchmaking activities between Israeli and American companies, business development and relationship management with West Coast hi-tech companies, and strategic growth initiatives. Ms. Miasnik has been promoted to this role in 2004 after being an associate at BIRD beginning at 2001. Ms. Miasnik has been a squadron officer in the Israeli Air Force and holds BA degree from Tel-Aviv University.



Bruce Money , PhD

Title: Department Chair and Fred Meyer Professor of Marketing and International Business

Email: moneyb@byu.edu

Dr. Bruce Money is Chair of the Business Management Department and Professor of Marketing and International Business at Brigham Young University's Marriott School of Business. He is an internationally recognized expert in strategic networking and has been a visiting professor at business schools in Austria, Greece, and Singapore. Dr. Money has also received 7 outstanding teaching awards at undergraduate, MBA, and Executive MBA levels.

Prior to his academic career, Dr. Money worked in the marketing of financial services. Proficient in Japanese, his most recent business position was Vice President in the Los Angeles office of The Sakura Bank, Ltd. (now Sumitomo Mitsui), one of the world's largest banks. There he directed the bank's marketing strategy to Fortune 100 prospects for the Western U.S. and managed a corporate loan portfolio of \$200 million.

Dr. Money also served as partner in a consultancy to William E. Simon, former U.S. Secretary of the Treasury, for whom he initiated a Japanese investment program. Dr. Money also directed

\$1 billion in Japanese debt and equity relationships for The Koll Company (now CB Richard Ellis), the West Coast's largest real estate developer.

He has taught in over 50 executive education programs, for the University of Southern California, National University of Singapore, and the University of South Carolina, among others. He has acted as Training Consultant for Bayer Pharmaceuticals, CSX World Terminals, Blue Cross Blue Shield, Fuji Film, Nissan, Robert Bosch Corporation, and Sonoco.

He holds an undergraduate degree from Brigham Young University, an MBA from the Harvard Business School, and a PhD from the Paul Merage School of Business at University California Irvine, where his dissertation subject was strategic networking and national culture.



Andy Policano
Dean, The Paul Merage School of Business;
Professor, Economics/Public Policy
Policano@uci.edu

Andy Policano is a nationally recognized macroeconomist, whose emphasis is on monetary theory and policy, economic forecasting, the U.S. Social Security system and business school trends. His research in progress includes the optimal timing of earnings announcements and strategies for academic leadership.

Policano's academic career includes professorial posts in economics and finance at the University of Iowa, Fordham, University of Wisconsin-Madison; research associate at Columbia University, and a guest professorial at the Institute for Advanced Studies in Vienna, Austria. He served as Director of Graduate Studies, Department of Economics, Fordham University; Chairman, Department of Economics, and Senior Associate Dean, College of Business Administration, University of Iowa; Dean, Division of Social and Behavioral Sciences, Stony Brook University.

Prior to joining UC Irvine, he was the Kuechenmeister Professor of Finance at the University of Wisconsin-Madison and Dean of the School of Business, from 1991 to 2001. During his service as Dean, Policano was the guiding hand behind the development, design and construction of the \$23-million Fluno Center for Executive Education.

He has received research and study grants totaling more than \$1.2 million, and recognition for his work that includes the Excellence in Teaching Award, Executive MBA Program, University of Iowa; Stony Brook Distinguished Alumnus Award; and the Robert A. Jerred Distinguished Service Award, School of Business, UW-Madison. He sits on three corporate boards of directors, and has published in such journals and business education periodicals as Quarterly Journal of Economics, Journal of Political Economy, International Economic Review, Review of Economics and Statistics, Journal of Monetary Economics, and Executive MBA Magazine.

Policano received his PhD and MA in Economics from Brown University, and his BS in Mathematics from Stony Brook University.

Key Research/Interest Areas:

- Financial institutions and markets
- Macroeconomics
- Monetary theory
- Business school trends

Awards

- Stony Brook Distinguished Alumnus Award, October 1992
- Robert A. Jerred Distinguished Service Award, School of Business, UW-Madison, 2003
- Faculty Award for Distinguished Service, The Paul Merage School of Business, 2005

Publications on Business School Trends and Strategy

- “Rankings: At What Price?” BizEd, November, 2005
- “The Innovators—The Current Dynamics of the Business School Industry”, Executive MBA Magazine, Winter, 2003
- “The Critical Nature of Research in a Top Business School” BizEd, AACSB Int’l, 2002

National Committees and Academic Board Memberships

- Director, Graduate Management Admissions Council (GMAC), (2005-)
- Chair, AACSB New Issues Committee on Rankings (2005-)

Other Community Involvement

- Director, Orange County Business Council, (2005-)
- Member, Investment Committee, Orange County Community Foundation, (2004-)

**Alan B. Sellers**

Title: *Senior Partner at SAIL Capital Partners*

<http://www.sailcapital.com>

Alan has over 25 years of leadership experience in private investing, operating roles and Board level matters.

During his career he has served in senior leadership roles at Pacific Holding Company, one of America's largest private investment companies, Westar Capital, a well-regarded private equity/venture capital firm, and *SAIL Capital Partners*, which he helped jointly establish. He has also served in leadership roles at such companies as Dole Food Company (DOLE:New York); Flexi-Van Corporation (formerly listed on NYSE); and Ultrasystems, Inc. (formerly listed on NASDAQ), America's pioneering firm in alternative energy. Alan practiced law at O’Melveny & Myers, and accounting at Arthur Andersen & Co.

He has extensive international experience. For example, at Dole, he served as Executive Vice President as well as a Member of the Office of the Chairman. In these roles, his responsibilities spanned 89 countries and 55,000 employees.

In addition, he gained invaluable experience when he served as Dole's Chief Financial Officer and as their General Counsel. Alan has 25 years of senior roles in Mergers & Acquisitions, having led deals and due diligence in dozens of transactions ranging from \$5 Million to \$5 Billion. Another area of Alan's expertise is organizational effectiveness in order to grow companies. His operating experience includes numerous hi-tech and low-tech industries, and he is well-acquainted with the vagaries of growth curves in emerging and expansion-stage companies.

Alan sits on the Executive Committee of the Advisory Boards of both the Business School and The Center for Entrepreneurship & Innovation at The University of California Irvine. He attended Yale University where he received a B.A. in economics; The Wharton School at the University of Pennsylvania where he received an M.B.A.; and Columbia University School of Law for his J.D. He received a CPA from New York State.



Sasha Strauss

Title: Managing Director Innovation Protocol Strategic Brand Development

Email: sstrauss@innovationprotocol.com

Clients, agencies, media and academic institutions call upon Sasha Strauss' award-winning forums worldwide; from Romania to China, Switzerland to Mexico. Media channels like National Public Radio (NPR), Forbes and The Wall Street Journal seek his expertise on branding everything from presidential candidates to innovative start-ups and Fortune 500s.

He has keynoted with notable speakers such as Magic Johnson, Tony Hsieh, Frank Gehry, Biz Stone and Simon Sinek.

With over 17 years in strategic brand development, Mr. Strauss has built brands at the world's leading advertising, PR, marketing and branding agencies.

In 2006, Mr. Strauss founded Innovation Protocol, a brand strategy consulting firm that exclusively serves innovators. As the Managing Director, Mr. Strauss leads a team of 30 strategy consultants that serve clients such as Warner Bros, Johnson & Johnson, Korn/Ferry International, ADP, Evite and PayPal. Innovation Protocol also allocates 10% of the company's brand development services to non-profits, with millions of dollars in philanthropic work being delivered since the firm's founding.

When not supporting Innovation Protocol's international clientele, Mr. Strauss teaches graduate brand strategy at USC's Marshall School of Business and Annenberg School for Communication. After

only five years of teaching, both courses have a year waiting list and remain the most impacted courses in both programs.

On the other side of town at UCLA's Anderson School of Management, Mr. Strauss is an Executive in Residence, coaching EMBA's in corporate and professional brand development. Via these professorial roles, Mr. Strauss also teaches at preeminent graduate programs such as MIT Sloan and The Johnson School at Cornell.

Mr. Strauss holds a bachelors degree from UC Irvine, a masters in strategic corporate communication management from USC and an executive business management degree from UCLA's Anderson Graduate School of Management.

Mr. Strauss is a certified Toastmaster, an Entrepreneur's Organization leader, a Big Brother (mentor), an Eagle Scout and a swooning husband.



Lisa Varga

Title: CEO and Founder of Phoenix Energy Technologies

<http://www.phoenixet.com>

Lisa Varga, CEO and Founder of Phoenix Energy Technologies, brings over 20 years of energy and retail facility management experience to the Phoenix Team.

Prior to co-founding Phoenix, Lisa led sales and marketing efforts for a national energy consortium and a leading waste management company.

Lisa's wealth of retail knowledge and experience has been invaluable to the success of Phoenix as well as some of the industry's leading trade organizations.

She has served on several boards including the Board of Directors for Professional Retail Store Maintenance (PRSM) since 2007; is a Co-Founding member and served as Chairperson for the PRSM Sustainability Council, a resource center for green initiatives, legislation and best practices; Lisa is a Co-Founding member and on the Board of Directors for Woman in Facility Maintenance and Construction and is an active member of an Orange County chapter of VISTAGE. Lisa is also involved in her Church as a High School Ministry Leader.



Margarethe F. Wiersema, Ph.D.

Title: Deans' Professor of Strategic Management

The Paul Merage School of Business, University of California, Irvine

Email: mfwierse@uci.edu

www.merage.uci.edu/go/mwiersema

Margarethe F. Wiersema holds the Dean's Professorship in Strategic Management at The Paul Merage School of Business, University of California, Irvine. She has an MBA and Ph.D. from the Ross School of Business at the University of Michigan.

Professor Wiersema is internationally recognized as one of the leading experts on corporate strategy and CEO succession and replacement. She has published extensively in the premier journals in the field including the *Harvard Business Review*, *Strategic Management Journal*, *Academy of Management Journal*, and *Administrative Science Quarterly*. Her research is widely acknowledged by over 3500 citations, numerous best paper awards by the Academy of Management and Strategic Management Society, and invitations to present her research at leading universities including the Duke University Strategy Conference, London Business School Ghoshal Conference on Managerially Relevant Research, and the inaugural conference for launching the *Global Strategy Journal*. Prof. Wiersema's research has been quoted by the *New York Times*, *The Financial Times*, *The Economist*, *Fortune*, *Business Week*, *the Washington Post*, and her research has appeared in The Economist Intelligence Unit for their "Executive Briefing".

The recipient of numerous awards for excellence in research and teaching, Professor Wiersema was elected as a Strategic Management Society Fellow in 2012 for making significant contributions to the theory and practice of strategic management. In 2006, she was awarded the Distinguished PhD Alumni Award from the Ross School of Business at the University of Michigan. She is an International Fellow for the Advanced Institute of Management Research in the UK. She has served on the faculty at the Business Schools at the University of Michigan, Rice University (where she held the Fayez Sarofim Vanguard Professorship in Management), and as a visiting scholar at the London Business School.

Professor Wiersema is actively involved with the business community by providing expertise on the subject of strategic analysis and thinking as well as the role of the Board of Directors and corporate governance. She has addressed a variety of business audiences and has consulted with *Fortune 500* companies, and has been actively involved in Director Training.

Prof. Wiersema serves as Associate Editor of the *Strategic Management Journal*, the premier journal in the strategy field and as Associate Editor of the *Academy Management Review*, the top theory journal in management with the highest impact factor of any journal in business. In addition, she serves on the editorial boards of *Organization Science* and the *California Management Review*. She served on the board of directors of the Strategic Management Society (2006-2010) and was Past President of the Corporate Strategy and Governance Group of the Strategic Management Society (2006-2008).

Participants



Nissim Asaf
Lesico CleanTech
nissim@lesico.com

An entrepreneur with extensive experience in business development, building and shaping highly effective, multi-site R&D teams, new product introductions and commercialization.

Nissim is the founder and CEO of Lesico CleanTech, an innovative company who delivers brine management and zero liquid discharge (ZLD) technologies for water production processes and other water intensive industries, mainly the gas&oil sector.

Nissim brings an integrated perspective to his role. He has over 10 years' experience in business development, deal making, strategy development and tactical approaches. He combines this with an in-depth understanding of the water industry.

Nissim is an active member of several national and international water industry associations as well as in governmental water management initiatives.

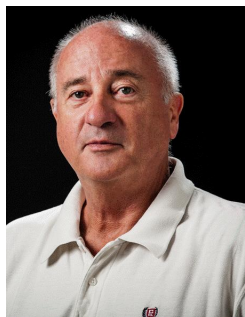


Tamara Baksht, Ph.D
VisIC Technologies
Tamara@visic-tech.com

Tamara Baksht is CEO and co-founder of VisIC Technology, Startup Company developing high voltage high power transistors for energy conversion. Prior to founding the company, Tamara worked for 10 years for Gal-El (MMIC), joint venture of ELTA and Rafael, where she started development of new technology of GaN transistors for radar applications.

For much of Tamara's carrier, she has focused on semiconductor technology, especially for high power applications and liaison between new technology and customers.

Tamara earned bachelor degree in Philosophy and BSc and MSc degrees in Physics from Tomsk State University in Russia and PhD in EE from Tel Aviv University. Tamara is member of IEEE society, co-author of few patents and papers in referred journals. Tamara is married and mother of two daughters (Sofia and Anna) and living in Tel Aviv, Israel.



Robert Barzelay
EcoBasalt Ltd
robert@ecobasalt.com

18 years experience as business consultant, and 18 years in various corporate executive positions. Established and managed the local subsidiary companies of Serono in Singapore and Australia. Worked in the capacity of CMO and VP Marketing for several emerging and start-up companies in MedTech, BioTech and CleanTech in Belgium, France, Germany, Israel, Netherlands, Switzerland, UK and USA. Extensive expertise in corporate management, international business development and marketing. Assisted with the technology transfer and sale for a variety of tartups.

Founder of 4 startups. Instrumental in introducing new technologies and medical treatment modalities in a great number of countries. Built production plants in Ireland and Puerto Rico. Organized medical symposia in Southeast Asia. Managed and supervised clinical trials in Europe and APAC. Developed and presented a variety of marketing and sales training programs.

Current focus on consulting startups, upstream & downstream marketing, innovation scouting & marketing due diligence. Presently involved in establishing EcoBasalt Ltd. Background in business management & marketing. Degrees in political science & history. Worked globally and lived in 11 countries.



Eli Belotsercovsky
Ministry of Foreign Affairs
eli.belotsercovsky@mfa.gov.il

Eli is responsible for the Israeli economic relations with India and China as well as for the environmental issues in the Israel's economic foreign policy. Eli is a career diplomat and joined the Ministry of Foreign Affairs as a cadet in 1995. Since he served as the Deputy Chief of Mission in Israeli missions in Singapore and in Cyprus.

In summer 2011 he completed four years as the Deputy Chief of Mission in the Embassy of Israel in New Delhi. In his postings in Israel he served as the desk officer for Russia and the Balkans and as an assistant to the Deputy Director General of Economic Affairs.

Prior to joining the Ministry Eli worked as a marketing manager at the Har Hotzvim Technological Incubator. Eli holds an M.Sc. in International Management from the Beer Sheba University and the Boston University joint program and a B.A. in International Relations and Chinese from the Hebrew University of Jerusalem.



Yuval Berson
Linum System
yuval.b@linumsystems.com

Yuval is an experienced marketing and business development professional, with 14 years of experience in the renewable energy, power distribution and telecom markets.

Yuval has co-founded Linum Systems, a solar, hybrid air conditioning Company together with Amir Hirshfeld in 2009 and is the company's CEO.

Prior to Linum Systems, Yuval has served as Head of Marketing at Di.S.P, a distributed solar power company, which developed a combined solar heat and power solution. Prior to Di.S.P, Yuval served as Director of Marketing at Dekolink Wireless and Director of Product Management at PowerDsine (Nasdaq:PDSN), which was later acquired by Microsemi Corporation (Nasdaq:MSCC).

Yuval holds a B.Sc. in Electrical Engineering from the Technion in Haifa, Israel and has written several published patents.



Michal Chorev
SolarEdge Technologies
Michal.Chorev@gmail.com

A service oriented executive with vast management experience in a demanding and stressful international high-tech environments. Extensive experience leading large operations, technical and professional services groups in companies like Check Point, Dassault systems and Exanet (Dell).

Director of Support Operation at SolarEdge, Solar power harvesting and PV monitoring solution, maximizing the solar power generation.

SolarEdge was recently selected among the 10 most promising Israeli startups and won the Prestigious Intersolar 2012 Innovation Award.

Michal Graduated from Monterey High School, California, served as an IDF Navy instructor in a Tactical simulator and graduated economics studies at Bar Ilan University.



Gabby Czertok
HydroSpin
gabbyc@hydrospin.net

Social and technological entrepreneur, founder of several NGO's focused on encouraging innovation and entrepreneurship throughout various communities and industries.

Gabby is the CEO of HydroSpin, an innovative startup who generates electricity from the flow of water inside pipes (recently selected as one of the 5 most promising cleantech companies in Israel).

Gabby is also the managing director of CleanIsrael, the largest cleantech professional networking forum in Israel (1000+ members) for over 3 years.

Gabby is a graduate of the IDF Exclusive training program “Mamram” and served in an elite technological unit of the IDF and holds an LL.B from Tel Aviv University.



Stela Diamant, Ph.D
Blue I Water Technologies Ltd
steladi@netvision.net.il

Dr. Stela Diamant is Blue I water Technology VP Marketing & CTO. Previously Stela served as a Director of Advance Process Control Solutions with MKS Instruments Inc. leading the development of a product suite data collection and analysis. Prior to her role at MKS, Dr. Diamant was the Head of R&D Process and Applications at Sagitta Ltd. – a failure analysis and fiber optic systems company – and led the development of optical buffers at an Israeli start-up. Previously, she was a member of the technical staff at Applied Materials Inc. and part of the cleantech founding team. Where, among others, she managed the development of tools and process development with design for cleantech and sustainability .

Dr. Stela Diamant is the holder of patents in plasma sources, optical components process and automated process control. Mrs. Diamant holds a Doctor of Sciences in Physical Chemistry from The Technion, Israel Institute of Technology.



Zeev Fisher
Mapal Green Energy
zeev@mapal-ge.com

Founder and CEO, Mapal Green Energy Limited. Mr. Fisher has twenty years of experience in marketing and managing the development of environmentally friendly water and wastewater treatment projects within Israel and internationally for some of Israel's largest infrastructure companies. His responsibilities have encompassed all aspects of project development –engineering, commercial arrangements and management systems. Many of his projects have involved new technologies and innovative funding mechanisms, such as public and private partnerships.

His work has involved both municipal and industrial projects, of varying size and complexity. Mr. Fisher holds a BSC in Mechanical Engineering from the Ben-Gurion University of the Negev, Beer-Sheva.



Hila Goldfeld
Weksler, Bregman & Co Advocates
hilag@wblaw.co.il

After having served as instructor and combatant in the Israeli Artillery Corps (IDF), I graduated from the Hebrew University of Jerusalem in 2007, with a Bachelor Degree in Law and Business Administration. In 2011, I graduated from the Tel-Aviv University with a Masters degree in Law (LLM).

I have been working as a lawyer in Weksler, Bregman & Co since 2008. As such, I provide business legal services in Commercial and Corporate Law, to diverse high profile companies, including public companies and bank establishments. Our clients are comprised of major companies acting in various fields such as telecommunications, infrastructures, energy, security consulting, and fuel management.

I also represent numerous clients before commercial courts, civil courts and arbitrators, in the framework of complex and comprehensive proceedings, with regard to a wide spectrum of matters, including professional negligence, Corporate Law, Banking, Securities Law, insolvency and liquidation proceedings. The judicial representations I provide to my clients spreads from the initial stages of the court proceedings to the final court decision, and eventually, as the case may be, appeal proceedings. I am 31 years old, I have been married for 2 years, and I live in Petach Tikva, Israel.



Rotem Har-Lavan, Ph.D

Rosetta Solar

rotemhl@gmail.com

Founder and the CTO of Rosetta Solar, a startup company aiming to boost up the conversion efficiency of state of the art silicon solar cells using an add-on thin film technology. He brings to the company his hands-on expertise in semiconductor materials, surface and interfaces chemistry, as well as his semiconductor physics background.

Rotem did his PhD on hybrid silicon-organic solar cells, in Weizmann Institute of Science under the supervision of Prof. David Cahen. The physical concept underlying Rosetta Solar's propriety photovoltaic solution (patent submitted) is a fruit of his review of the field in general, while analyzing owns work for his doctoral thesis, in integration with notion and ideas well known in the photovoltaic community.

Rotem joined forces his older brother Nitzan, with his long years of production and operation management experience to raise the required funds and build up the company.

Prior to his PhD, Rotem was a senior R&D physicist in Al-Cielo (fiber-optic gyroscopes), as well as in Chiaro Networks (electro-optic based communication core-routers).

Rotem Holds a B.A and M.Sc degrees in physics from the Hebrew University in Jerusalem, Ph.D in Material Science from Weizmann Institute (Rehovot, Israel) and a Major rank (reserve) of the Israeli Air Force (IAF) serving as an infantry-air-force combat coordination officer.



Udi Leshem

Aquanos

udi@aqwise.com

Udi Leshem has earned a MSc. degree in Environmental Engineering from the University of Massachusetts in Amherst following his graduation.

He had become acquainted with both the technical aspects of the water market through a consultant position in a leading consulting firm job and of the commercial aspects of the field through his position as a sales manager for Siemens Water Technologies.

For the following four years, Udi had served as VP for Business Development and marketing in Aqwise, a company that specializes in wastewater treatment. In this position, Udi was in charge of both development of new markets and establishing strategic relationships and commercialization of the company's new products.

Last year, Udi had co founded Aquanos, a promising start up company specialized in innovative wastewater treatment and renewable energy production.



Nir Naveh

Bermad CS Ltd- Water technology

navehn@bermad.com

Nir Naveh spent his entire career in the water technologies arena. His current position is vice president of marketing for Bermad, where he leads the marketing and business development of the company's three main market segments: irrigation, waterworks, fire-protection systems. Nir implemented and manage the products management approach as part of the marketing duties in the company.

In parallel, Nir is the chairman Bermad subsidiary in Brazil. Nir also leads Bermad's partnership in the start-up "Aqueduct" that deals with managing water efficiency projects, as Bermad's director. Nir is a member of the IWA (international water association). Previously, Nir was the international marketing manager for BERMAD in the waterworks and industry segment and the lead application engineering of BERMAD.

Between these two positions, Nir was the director of technical marketing in ATLANTIUM Ltd, a mature start-up that deals with advanced illumination technologies for water disinfection in various industries, such as fishery, food & beverage, municipal water, etc. Nir Naveh holds a B.Sc. degree in Agricultural Engineering from the Technion Haifa and M.Sc. degree in Water Resources Engineering and Management from the Technion Haifa, and PhD studies in water resources and hydrology in the college of engineering in the University of Washington, Seattle, USA (not completed).



Shimon Peretz

Eltav Ltd

shimon.peretz@eltav.com

Joined Eltav in February 2011 as CEO.

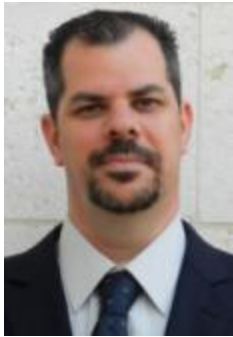
Previously served as CEO in AGAM Flam Cutting Services- Israel largest plasma and flame cutting services manufacturer, and before that as Regional Sales Manager- Scandinavia in Ham-Let Group.

Sales oriented with strong technological & commercial skills, an excellent communicator and presenter, motivated hunter, relationship builder and creative problem solver. Specializes in: Industrial Marketing Strategy, Marketing Research, Marketing Channels, Data mining, Sales Team Management and Project Leading.

Responsible for Eltav's Business Development and Sales Activities.

M.B.A from Tel Aviv University & Copenhagen Business School (Specialization in marketing and strategy) B.A in Economics and Multi-Disciplinary studies from Haifa University (Magna Cum Laude) Electronic Technician **Community Outreach:** Team Leader- NOVA Project

Managed 4 MBA's professional advisers towards improving business activities for non-profit organizations, including IsrA.L.S and Appleseeds Academy



Noam Perlmutter, Ph.D
Rotec Ltd
noam@rotec-water.com

Dr. Perlmutter is an expert in managing and promoting early stage technology companies, taking advantage of his deep professional and scientific background in the various fields of clean-Tech and renewable energy industry and also in life science areas.

Currently, Dr. Perlmutter is the CEO of ROTEC Ltd. an innovating startup developing cutting edge engineering solutions for the desalination and general water treatment industry. Prior to that Dr. Perlmutter has held several R&D managing and CTO positions in the Israeli water industry.

Dr. Perlmutter holds a B.Sc. in Biology, M.Sc. in Ecology and Environmental Quality and a Ph.D. in Eco-toxicology, all from the Life Sciences Faculty at the Tel-Aviv University.

Noam served as an officer in the Israeli Navy and is currently serves as a professional officer (Major) in the IDF reserve forces.



Eatay Pomeranz
Amiad Water Systems/ Amiad usa
Epomeranz@pepfilters.com

Disc Filters Product Manager and Senior Application Engineer- Amiad water system Born and raised in Israel, at Kibbutz Sarid came to the United States in 2011 To strengthen the application knowledge of the U.S. subsidiary and to help promote the Amiad products.

Education The Ruppin Institute – PE (Practical Engineer) Diploma in Water and Land Engineering (1992) At 2009 after four years as technical director of the Department I become the Manager of MFD (Machining Fluids Division Start-up Company owned 100% by Arkal) design and manufacture of Filtration Systems for coolant fluids of industrial machine tools.

(Holds two patents in this field) From 2003 Arkal Filtration Systems – Technical Support for sales to industrial market in the USA (training of dealers and establishing of local support network);

continuing in development of new applications From 2002 Arkal Filtration Systems – R&D: in charge of testing of new products and development of new applications for existing products From 1999 Mei-Gal Water Purification (an Arkal subsidiary) – Technical Service Manager and Applications Engineer for industry and agriculture On 1994 Joined Arkal Filtration Systems – As technical Service for Israel and Africa; From 1985 to 1994 Farmer at Kibbutz Sarid.



Gil Shaki

Office of the Chief Scientist

gil.shaki@moital.gov.il

In recent years, as part of the Office of the Chief Scientist management team, responsible for the OCS' support programs and activities focused in the Cleantech sectors (water, renewable energies, oil substitutes, reducing GHG emissions, Green Growth Strategy), representing Israel in OECD's Committee for Scientific and Technological Policy (CSTP), involved in designing and launching various new support programs for investors, traditional industries and R&D in the financial sector and involved in the OCS international cooperation policy and activities.

Before that served as the head of the commercial sections in Israel's embassies in New Delhi, Madrid and Lisbon, assisting Israeli companies and service providers penetrating local markets as well as attracting investments to the Israeli market.

Previous to that worked as an economist in the Investment Center of Ministry of Industry, Trade & Labor and in the Logistic and Technology department in the IDF (Israeli Defense Force). Holding Masters in Business Administration (M.B.A.) and B.A. in Economic and the Studies of the Middle East, both from Bar-Ilan University, Israel.

Speaking fluently Hebrew, English, Spanish, Portuguese and French, with some basic communication skills in other languages.

Loves working in international environment, traveling, reading and listening to music.



Meir Shimko

Diffusaire Ltd- Aeration Technology

meir@diffusaire.com

Meir has extensive experience in sales, marketing, vendor negotiations and management at the senior executive level. Focus in innovative marketing concepts and strategies.

Meir is entrepreneur, initiator, promoter also as CEO of Diffusaire Ltd.- An Innovative, Patented, Cost Effective, Efficient & Advanced

Aeration Technology. Saving ~50% of Aeration Energy Costs and O&M Costs. Zero Downtime & No Process Interruption during Installation & Maintenance. ROI ~2 years only. Proven Technology in WWTP.

Ex. VP Subsidiary Operations & VP Global Marketing in IDE Technologies Ltd. is a pioneer and world leader in desalination water technologies. Whilst working for IDE led and won two major projects in China and India, each worth more than US\$ 100M and establish and upgraded IDE Americas (LA office), IDE India and IDE China.

B.Sc., Agricultural Economics and Administration, 1988 - The Hebrew University of Jerusalem
Live in Kibbutz Beit-Kama, and most important father to 5 children and will reach age 49 during the program (30.10).



Adi Yefet-Beeri

Israel NewTech - Ministry of Industry, Trade and Labor

Adi.YefetBeer@moital.gov.il

A native of Jerusalem, Adi Yefet-Beeri is a project manager at the Ministry of Industry, Trade, and Labor, working with Israel NewTech, a national program aimed at promoting Israel's water and sustainable energy sector.

After graduating high school in 2001, she studied at a midrasha in Kibbutz Ein Hanatziv and then served as a combat unit instructor in the army.

She also chose to serve as a shlichah of the Jewish Agency to Camp Yavneh in New Hampshire, where she worked for four summers.

Adi earned her BSW- Bachelor of Social Work at the Hebrew University of Jerusalem and was made a cadet in the Atidim– Cadets for Public Service program, a 3-year program which trains participants to be the future leadership of the civil service sector.

During her studies she worked as a student intern in the Ministry for the Development of the Negev and the Galilee, and as a social worker at a public treatment center for drug addicts. She also holds an MA in Organizational Sociology from the Hebrew University.

Adi lives with her husband Boaz in Jerusalem.

She loves to dance and enjoys hiking and traveling, both in Israel and around the world.

Guest Speakers and Hosts

Eyal Aronoff

eyal@aronoffgroup.com

Eyal Aronoff is a serial entrepreneur and co-founder of Quest Software, one of the largest independent software vendors in the world (Nasdaq:[QSFT](#)).

Eyal's current focus is energy and philanthropy. He is a major contributor of funds and strategy to the effort to decrease the world's dependence on oil. Recently Eyal co-founded the **Fuel Freedom Foundation** which promotes a blueprint for solving the oil price crisis by removing barriers to fuel competition via a grass root effort. At the **Fuel Freedom Foundation** we are creating the gathering place for those individuals who are frustrated with the inability of Washington to deal with our oil addiction and want to do something about it.

www.FuelFreedom.Org

Eyal graduated Summa Cum Laude in Chemistry and Computer Science from Bar Ilan University in Israel and now lives in lovely Newport Beach CA.

Katherine Merage

Katherine Merage is a leader in the Jewish community of Los Angeles and Orange County. Indeed, she has been a leader in every community she has ever lived in. Born in Iran, Ms Merage is a noted philanthropist and visionary with respect to the health and well being of the Jewish Community in Israel and the U.S.

Her leadership and financial support has helped sustain the quality and related reputation of Hadassah Hospital in Jerusalem Katherine's generosity contributed to the development of the University Synagogue in Orange County and the Jewish Community Center in Orange County. Both facilities are named after her and her late husband Andre. Katherine is committed to the growth and development of the Negev in Israel as a welcoming place of opportunity for the Jewish people.

Lilly Merage

Lilly Merage is an immigrant from Iran. She was, as Paul says, his "partner" in the development of Chef America. Lilly has been and continues to be involved in and a supporter of the arts. She is a leader in the development of the innovative Artists in Residence program, joining the Merage Foundations to Chapman University Film School and the Orange County High School of the Arts. During the summer, fifteen high school students, many of them from low-income and immigrant families, spend two weeks at Chapman College learning filmmaking.

Paul Merage

Paul Merage is the Founder and Chairman of the Merage Institute. Paul has over 35 years of experience in consumer products. Following 10 years of management experience with major packaged food companies, Paul founded ChefAmerica, a start up frozen food Company in 1975 along with his brother David. In time ChefAmerica became one of the largest and most profitable privately held food companies in the US. It is best known for Hot Pockets and Lean Pockets. ChefAmerica operated nationally with a workforce of over 2000. ChefAmerica was sold to Nestle in 2002 for \$2.6 billion.

He is now actively engaged in providing vision and strategic direction for the MIG CAPITAL and its affiliate companies. MIG CAPITAL and its affiliates were a natural progression of the need for a platform to carefully and professionally manage, preserve and enhance the family capital.

Paul is also highly focused on a mission to “give back to America.” Paul and his family created The Merage Institute. The Institute’s programs are all aimed at improving quality of life through education. Each has gained positive national and indeed, International attention. He is active with the University of California Irvine’s Paul Merage School of Business as the Chair of the Executive Committee of the Dean’s advisory board. In addition Paul and the Merage family support a number of other philanthropic efforts. Paul received a B.S. in Economics and a MBA from the University of California.

Jacob Segal

jsegal@investorsresearchgroup.com

Mr. Jacob Segal, Principal of Investors Research Group (IRG) is an active investor/advisor to Southern California based companies with sales in the \$ 3- 20 million dollar range. His investment experience includes transactions with companies in the airport concessions business, financial services marketing, wire and cable manufacturing, radio programming distribution, medical devices, intelligent sensors and early stage companies.

Mr. Segal is/was an investor/advisor in Creative Host Services, Thaya Communications, Suede AM Pack, American Equity Trust, Rhythm Radio, Electrical Grid Monitoring, Medical Tactile and Earth Bar. Additionally, Mr. Segal participated in the acquisition, management and disposition of over \$200 million in real estate investments including apartment buildings, shopping centers and office buildings. Mr. Segal received his Bachelor’s in economics and statistics from the Hebrew University in Jerusalem and his MBA from UCLA.

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Rabbi Arnold Rachlis

Rabbi Rachlis is the spiritual leader of University Synagogue in Irvine, California. Born in Philadelphia, Rabbi Rachlis received a B.A. from the University of Pennsylvania, and M.A. from Temple University and ordination and a Doctor of Divinity degree (honoris causa) from the Reconstructionist Rabbinical College.

Rabbi Rachlis has taught at Temple University and Spertus College, and has published scholarly articles, opinion pieces and poetry in a variety of publications, including *Judaism, Reconstructionist, National Jewish Monthly, Chicago Tribune, Chicago Sun-Times, Los Angeles Times, Orange County Register, Jewish Journal, Maj'shavot Pensamientos* and *A Psychology – Judaism Reader*.

Rabbi Rachlis has served in Washington, D.C. as a White House Fellow and as a Senior Foreign Affairs advisor in the State Department. He was appointed a regional panelist for the President's Commission on White House Fellowships in both Democratic and Republican administrations, and was also selected as a Fellow in Leadership Greater Chicago.

The former rabbi of the Jewish Reconstructionist Congregation in Evanston, Illinois, Rabbi Rachlis was the youngest rabbi ever elected president of the Chicago Board of Rabbis.

His service to the community includes the boards or advisory boards of Jewish Fund for Justice, U.S. Inter-religious Committee for Peace in the Middle East, Americans for Peace Now, China Judaic Studies Association of Nanjing University, University of Illinois Fund for Gerontology Research, National B'nai Brith Hillel Commission, the American Jewish Committee, New Israel Fund, Orange Coast Interfaith Shelter and the Reconstructionist Rabbinical Association, of which he is a past president.

He has also served on the executive committee of the Southern California Board of Rabbis and as a member of the Orange County Board of Rabbis. Rabbi Rachlis has served on the board of Mazon, A Jewish Response to Hunger, for over 16 years and is now its Chair.

For nine years, Rabbi Rachlis hosted *Of Cabbages and Kings* on ABC-TV, as well as a syndicated cable television show on contemporary Jewish issues, *Hayom*. He has appeared as a guest on *National Public Radio, CBS, CNN and PBS*, and has been interviewed frequently by such publications as the *New York Times, Newsweek* and *Time*. He was profiled in the award-winning documentary film, *The Legacy*, and has served as a Judaica consultant for *Compton's Encyclopedia*.

Marvin Markowitz

Marvin is one of America's most respected food service providers and restaurateurs whose family owns Factor's Famous Deli (celebrating over 65 years in Los Angeles). He is a philanthropist and an active Board member in a number of charitable organizations benefiting the local and international Jewish communities, as well as the City of Los Angeles. He is a real estate executive in the Marmar Group, a real estate company in the greater Beverly Hills area. He is a husband, father and grandfather.

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