

The **ESOP** Communications Sourcebook

EXCERPT WITH CD CONTENTS

The excerpt below provides a description of the CD contents and a full list of the 60 documents in Part III. For more information on the book or to order, go to nceo.org/r/sourcebook

Appendix 2: CD Contents

The CD accompanying this book includes five folders:

- Every document in Part II of this book, saved as Microsoft Word files so you can open them and use them as templates.
- Part III of the book, which includes materials illustrating what other ESOP companies are doing (described below).
- Part IV of the book, which consists of PowerPoint presentations from the NCEO, described in appendix 3.
- Part V of the book with case studies of ESOP companies with strong communications programs.
- Part VI of the book has recorded replays of popular NCEO Webinars, described in appendix 4.

To view all of the documents on the CD, you will need the following programs on your computer: Adobe Acrobat Reader (to open PDF files), Microsoft Word, Microsoft Excel, and Microsoft PowerPoint (or programs that can open such files). Load the CD into

your computer and click on the folder titled “Part III.” The sample company documents will be listed in order, and you can view them in correspondence with the numbers below.

Part III Materials

Part III of this book, which exists only on the book’s accompanying CD, provides sample communication documents from various ESOP companies. As stated in the introduction to this book, while the NCEO’s PowerPoint template in Part IV is yours to modify and use, the sample company materials in Part III are intended solely to give you ideas about how to communicate with your employees. Keep in mind that the companies themselves hold the copyright to this information. If you would like to use any of these materials, you must contact the company directly and ask for permission.

Handbook

Document 1: Carl Warren & Co (CWC) Employee Handbook, MS Word

Document 2: Gardeners Guild (GGI) Owners Manual, PDF

Document 3: Gardeners Guild (GGI) Owners Manual—Spanish, PDF

Integrated Communications

Document 4: Calibre (Calibre) Communications Overview, MS Word

Document 5: Calibre (Calibre) Welcome Article, MS Word

Document 6: Organically Grown (OGC) Communications Grid, MS Excel

Document 7: Phelps County Bank (PCB) ESOP Budget, MS Word

Document 8: Caltrol (Caltrol) Communicating in Difficult Times, MS PowerPoint

Newsletters

Document 9: SmithBucklin (SmithBucklin) Newsletter, PDF

Document 10: Lewis Tree Service (Lewis) Newsletter, PDF

Document 11: Lumber Products (LP) Newsletter, PDF

ESOP Basics

Document 12: Calibre (Calibre) Frequently Asked Questions, PDF

Document 13: Kapco | Valtec (Kapco) Bulletin: Allocation, PDF

Document 14: Kapco | Valtec (Kapco) Bulletin: Vesting, PDF

Document 15: Kapco | Valtec (Kapco) Bulletin: Distribution Timing, PDF

Document 16: Kapco | Valtec (Kapco) Bulletin: Top 10, PDF

Document 17: Kapco | Valtec (Kapco) Bulletin: Why ESOP, PDF

Document 18: Van Meter Industrial (VMI) Factsheet: ESOPs, PDF

Document 19: Van Meter Industrial (VMI) Factsheet: Distributino, PDF

Document 20: BL Companies (BL) Understanding ESOPs, MS PowerPoint

Document 21: BL Companies (BL) Statement of Participation, PDF

Document 22: Padilla Speer Beardsley (Padilla) Individual Timeline, PDF

Document 23: Thomson-Shore (TS) Diversification, MS PowerPoint

Document 24: Robert Bowden (RBI) ESOP Timeline, MS Word

Business Literacy

Document 25: Robert Bowden (RBI) Posters, MS Word

Document 26: Reflexite Corporation (Reflexite) Owners Bonus, PDF

Document 27: Gardeners Guild (GGI) My Dollar, PDF

Document 28: Van Meter Industrial (VMI) CEO Program, PDF

Valuation

Document 29: Birkenstock (Birk) Valuation Meeting, MS PowerPoint

Document 30: Van Meter Industrial (VMI) My Two Cents, PDF

Document 31: Van Meter Industrial (VMI) Pictures, PDF

Document 32: Thomson-Shore (TS) Valuation, MS PowerPoint

Document 33: Marland Mold (Marland) Valuation, MS Word

Employee Committees

Document 34: Social & Scientific Systems (SSS) Committee Charter, MS Word

Document 35: Carl Warren & Co (CWC) Minutes, MS Word

Document 36: Padilla Speer Beardsley (Padilla) Committee Timeline, PDF

Document 37: Herrera Environment Consultants (Herrera) Committee Charter, PDF

Document 38: Golden Artist Colors (Golden) ESOP Priorities, MS Word

Document 39: Calibre (Calibre) Committee Charter, MS Word

Document 40: Phelps County Bank (PCB) Annual Plan, MS Word

Company Documents

Document 41: Chatsworth Products (CPI) Marketing Material, PDF

Document 42: Chatsworth Products (CPI) Letterhead, MS Word

Document 43: Thoits Insurance (Thoits) Letterhead, MS Word

Advertisements

Document 44: Thoits Insurance (Thoits) Advertisement, PDF

Document 45: BankMidwest (BankMW) Advertisement, PDF

Document 46: MPD (MPD) Advertisement, JPEG

Press Release

Document 47: CITI (CITI) Press Release, PDF

Document 48: SmithBucklin (SmithBucklin) Press Release, PDF

Email Communications

Document 49: SmithBucklin (SmithBucklin) Email Announcement, PDF

Document 50: Reflexite Corporation (Reflexite) Employee Ownership Month, PDF

Document 51: Carl Warren & Co (CWC) Email Welcome, MS Word

Document 52: Carl Warren & Co (CWC) Email on Survey Results, MS Word

Celebrations / Games

Document 53: BL Companies (BL) Poster Contest, 8 JPEG files

Document 54: BL Companies (BL) EO Month, PDF

Document 55: Calibre (Calibre) EO Month Letter, MS Word

Document 56: Calibre (Calibre) Fact of the Day, MS Word

Document 57: Toll Company (Toll) Wordfind, MS Excel

Other

Document 58: Gardeners Guild (GGI) Sample Statements, PDF

Document 59: Padilla Speer Beardsley (Padilla) Important Conversations, PDF

Document 60: MTC (MTC) Suggestion Form, MS Excel