

# 12 MONTHS OF MOMENTUM: ACTION PLANNING YOUR OWNERSHIP CULTURE



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# Learning Objectives

By the end of this session, you will be able to:

- Design a comprehensive 12-month ESOP communication and education calendar integrated with existing organizational activities
- Create sustainable systems and processes for ongoing ownership culture development that require minimal additional resources
- Develop measurement strategies and feedback systems to track long-term engagement and continuously improve programs



# Polling Question 1

What is your BIGGEST challenge in maintaining year-round ESOP engagement?

- a) Limited staff/resources
- b) Engaging a remote or distributed workforce
- c) Measuring engagement effectiveness
- d) Getting leadership buy-in
- e) Creating fresh, engaging content
- f) Don't know where to start



What Are Your Goals?

GOALS

- - ARE - -

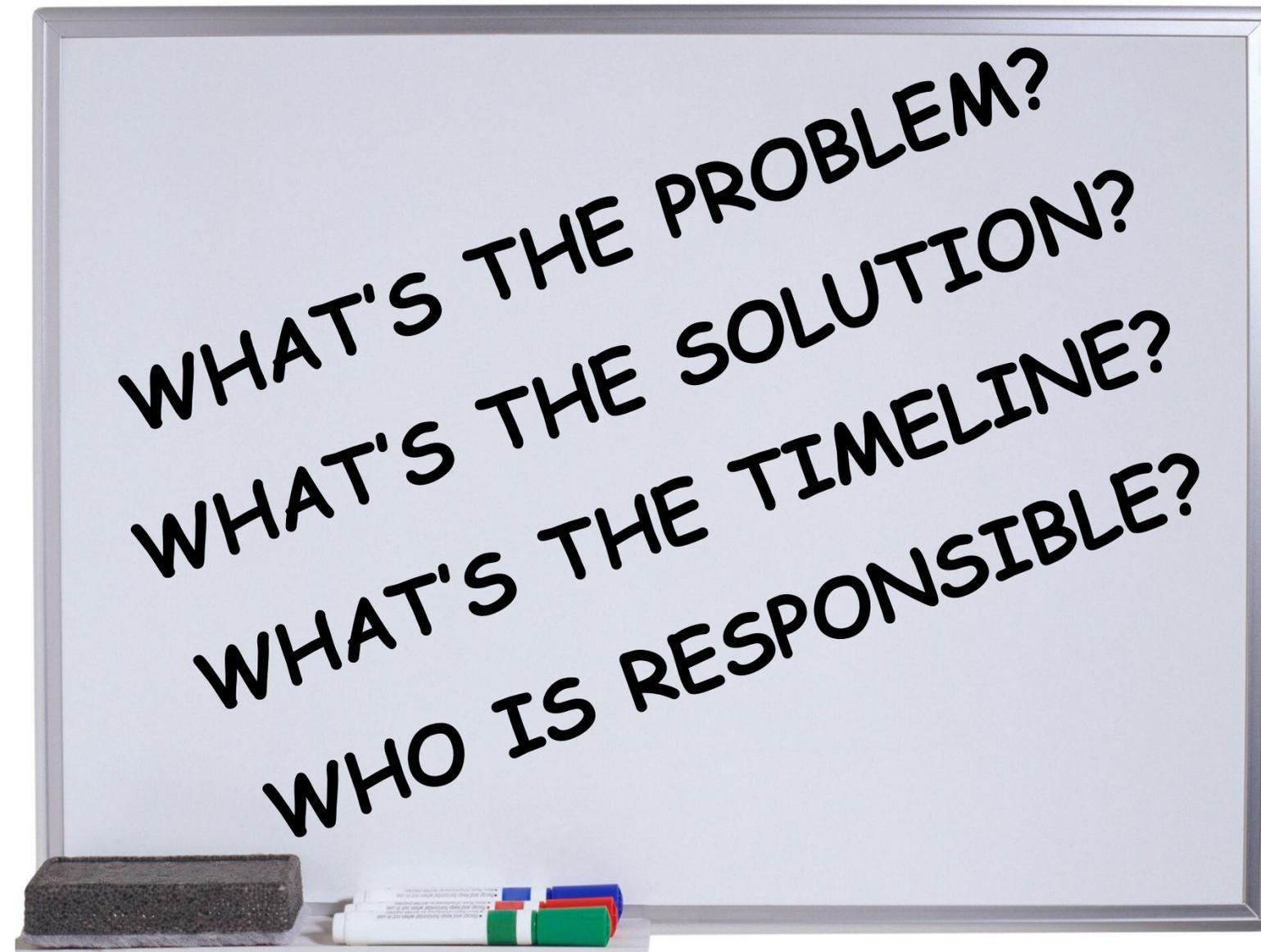
DREAMS

- - WITH - -

DEADLINES



# The Process of Planning





# EO MONTH CHECKLIST

COMPANY NAME [Company's name]

PROJECT MANAGER [Project Manager's name]

DATE 8/7/23

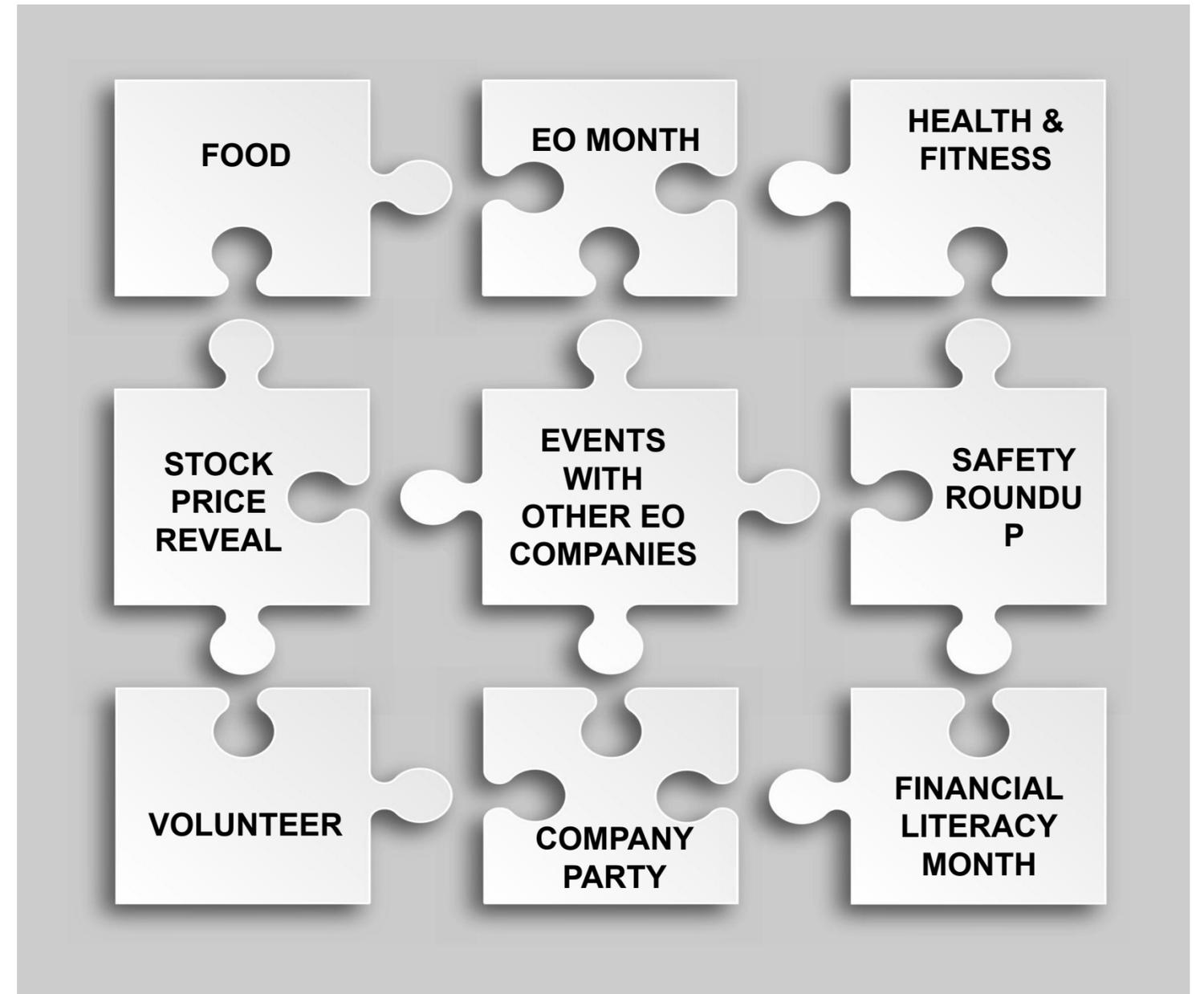
CATEGORY:	EXAMPLE ACTIVITIES	RESPONSIBLE PARTY	KPIs	PITFALLS/TIPS	ADVANCED PLANNING				EMPLOYEE OWNERSHIP MONTH					FOLLOW UP				
					AUGUST		SEPTEMBER		OCTOBER					NOVEMBER				
					7	14	21	28	4	11	18	25	2	9	16	23	30	6
1	Education	ex. ESOP 101	Committee	% attendance	Scheduling time off the floor to attend	create ppt		sign up sheet			ESOP 101							
2	External Communication																	
3	Fun / Inspiration																	
4	Engagement / Innovative Ideas																	
5	Other																	

PROJECT END

# Events

Events bring us together, serving as moments to celebrate, learn, and connect. Whatever the purpose, they create opportunities to grow and inspire.

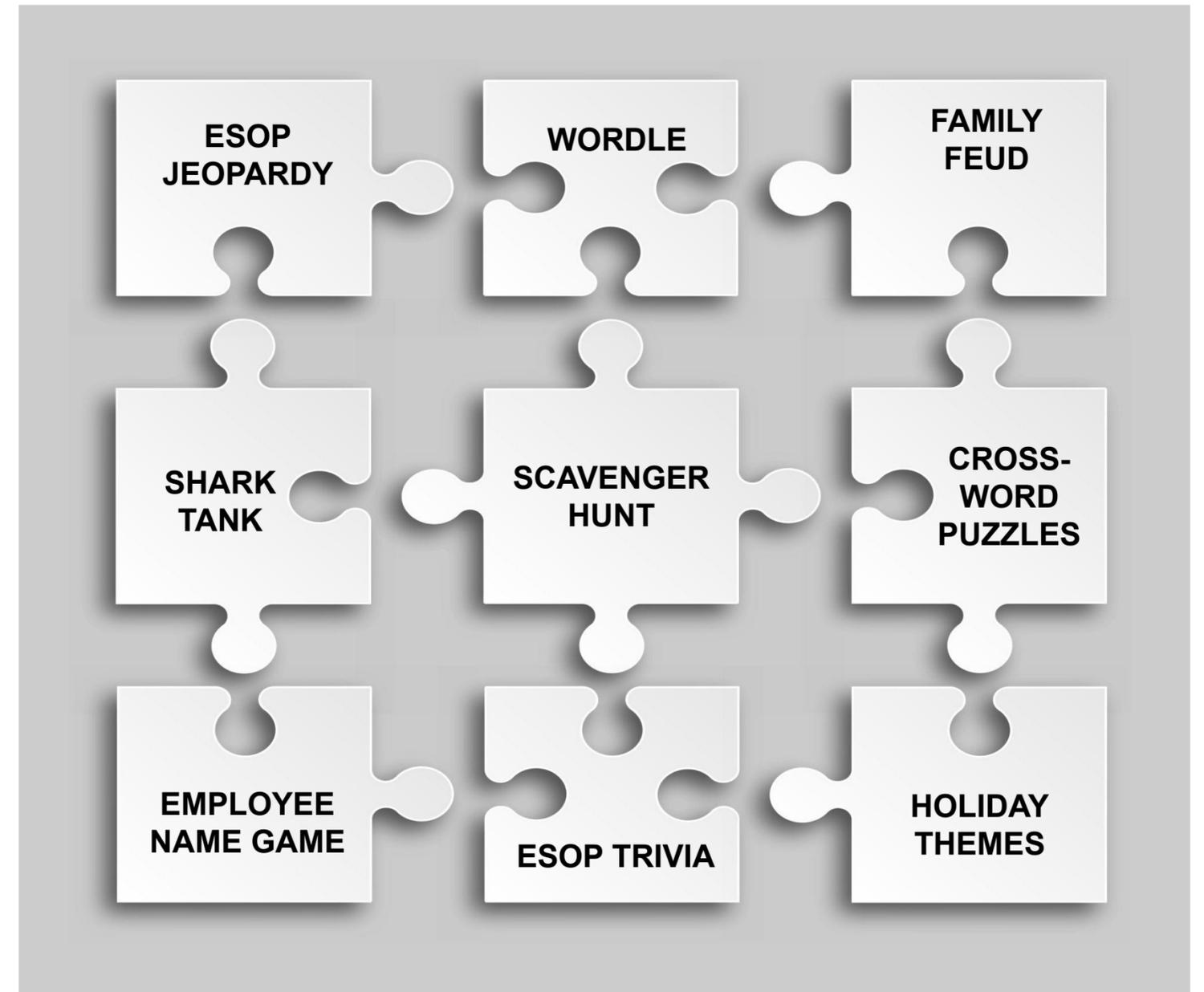
- What types of events are being held throughout the year?
- Any events to target specific audiences?
- What are the key EO messages for these?



# ESOP Themed Games

Games bring us together, sparking fun, challenge, and connection. Whether we play to compete, learn, or unwind, they create moments that engage and educate.

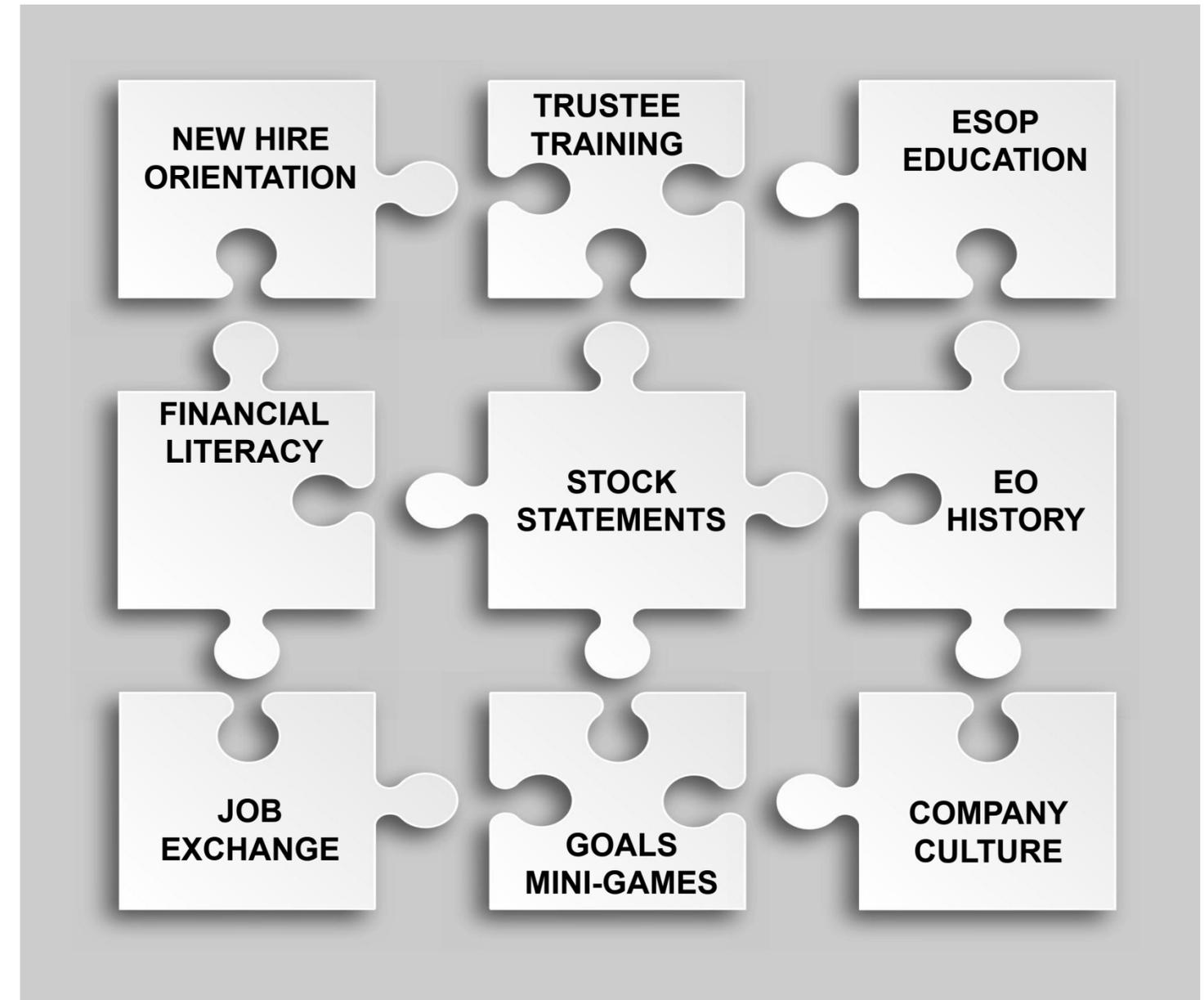
- What types of games do you play throughout the year?
- Any games to target specific audiences?
- What are the key EO messages for these?
- Any tips for each game?



# Education & Training

Education should meet employees where they are at: opening doors to learning, growth, and new possibilities. Whether through training or discovery, it empowers and inspires us to evolve.

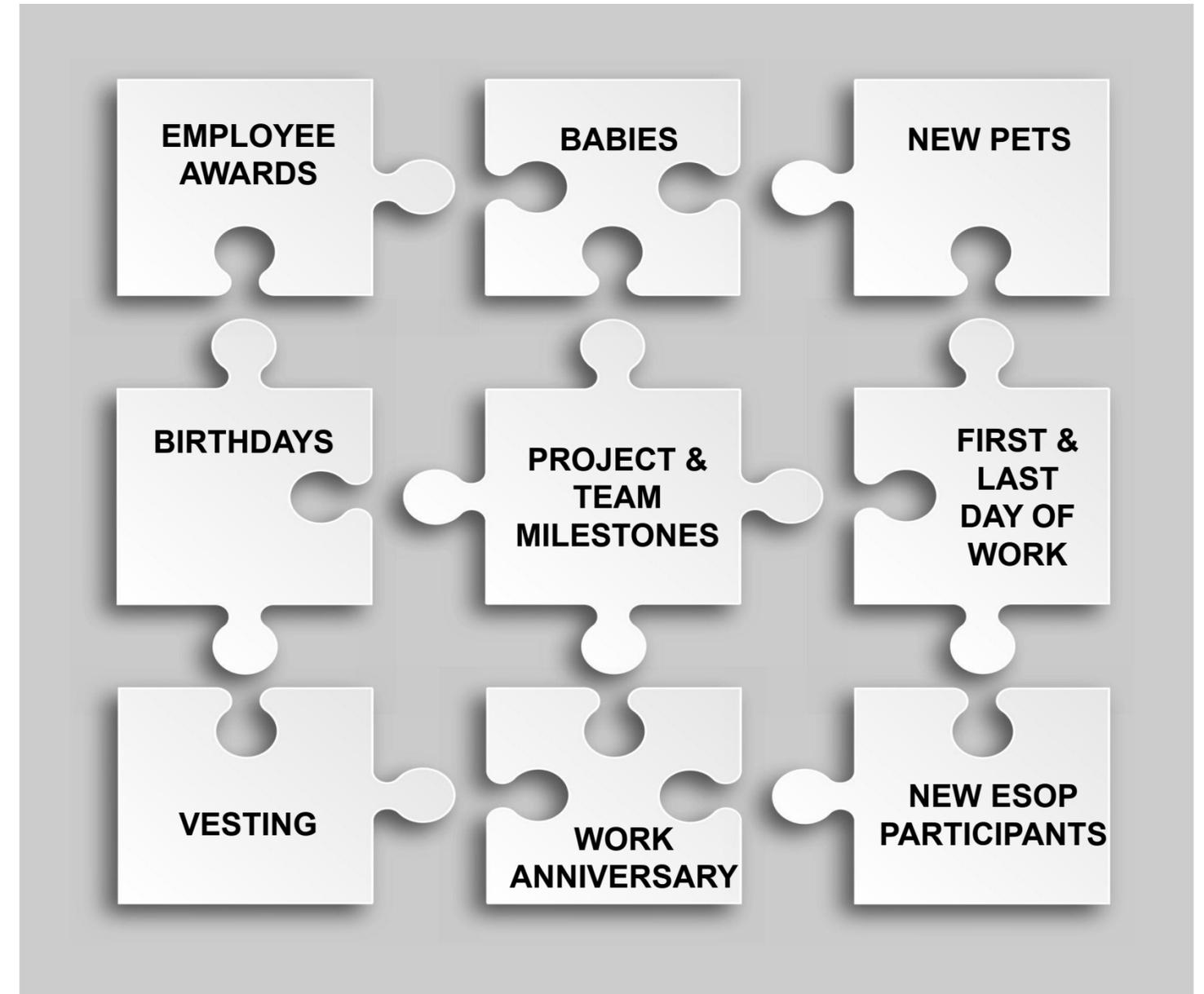
- What types of training or education do you hold throughout the year?
- Do you have a mentorship or leadership training?
- Any thing that is for specific audiences?
- What are the key EO messages for these?
- What forms do you present these in?



# Milestone Recognition

Acknowledging employee milestones is important partly because it just makes your workplace a more fun and joy-filled place to be. Employees will feel seen and included, not just as a worker but as a person too.

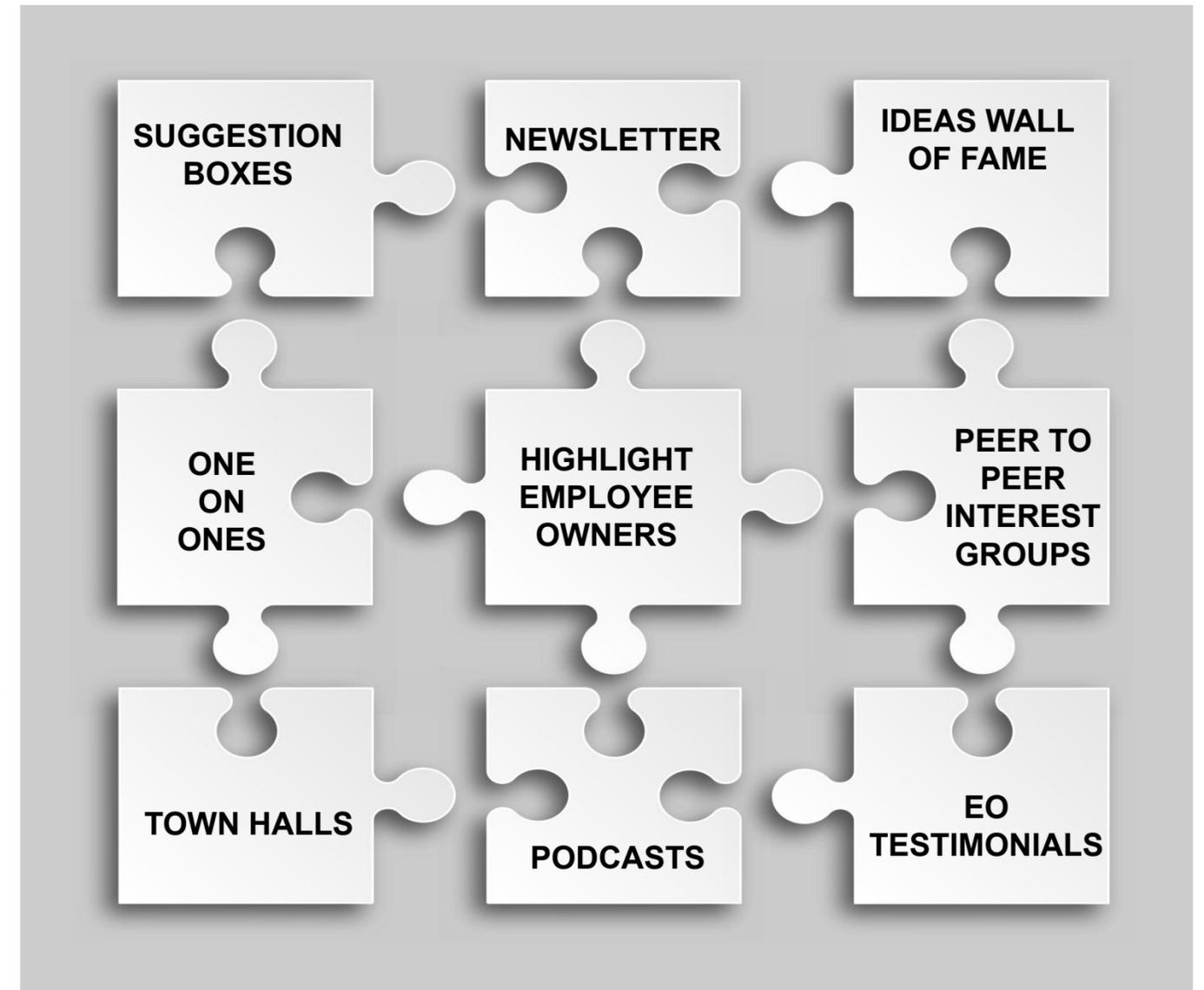
- What types of milestones does your company celebrate throughout the year?
- What are the key EO messages for these?
- What accompanies these celebrations?



# Communication Options

Communication connects us, whether through conversation, writing, or digital channels. Each method serves a purpose: informing, engaging, and bringing people together.

- How are you incorporating communication into your engagement plans?
- How are you collecting feedback?
- How are you tailoring communications to reach specific groups?
- What are the key EO messages for these?
- Any words of wisdom to accompany the communications?



# Employee Engagement Rubric

FEATURES	BASIC	STANDARD	PLUS
COMMUNICATION	ESOP BENEFITS ARE SHARED IN THE EMPLOYEE BENEFITS PACKAGE	EMPLOYEES ARTICULATE THE VALUE OF THE ESOP	EMPLOYEES DESIGN AND LEAD ESOP ENGAGEMENT ACTIVITIES
FREQUENCY	ONE ACTIVITY A YEAR TO SHARE DISTRIBUTIONS	ENGAGE IN ESOP EDUCATION MONTH	QUARTERLY OR BI-MONTHLY MEETINGS OR ACTIVITIES
ATTENDANCE	50% OF EMPLOYEES ATTEND	75% OF EMPLOYEES ATTEND	AT LEAST 85% OF EMPLOYEES ATTEND
LEADING OF ACTIVITIES	C-LEVEL EXECUTIVES LEAD ACTIVITIES	SENIOR MANAGEMENT LEADS ACTIVITIES	A COMMITTEE OF DIVERSE EMPLOYEES LEADS ACTIVITIES
ENGAGEMENT IN MEETINGS	TOP-DOWN COMMUNICATION (SIT AND GET)	TWO-WAY COMMUNICATION - ASKING AND ANSWERING QUESTIONS	EMPLOYEE FEEDBACK SUPPORTS THE DESIGN AND DECISIONS AROUND ACTIVITIES AND LEARNING
UNDERSTANDING OF SUCCESS METRICS	EMPLOYEES KNOW SUCCESS METRICS FOR ESOP	THE TEAM CAN ARTICULATE THE SUCCESS METRICS OF ESOP	SUCCESS METRICS ARE USED TO DRIVE BEHAVIOR
REQUESTING FEEDBACK	SEND SURVEYS AFTER ACTIVITIES	SURVEY FEEDBACK IS REVIEWED AND SHARED	SURVEY FEEDBACK IS USED TO SUPPORT DESIGN



# Polling Question 2

Based on the rubric shown, how would you rate your current ESOP engagement efforts?

- a) Basic (minimal activities, annual focus)
- b) Standard (regular activities, some two-way communication)
- c) Plus (comprehensive program, employee-led initiatives)
- d) Not sure/Need help assessing



# Bring It All Together: Guiding Questions

## Guiding Questions:

- Where are you in your ESOP journey? *(Just announced the transaction? Mature ESOP?)*
- What are your goals for ESOP communication? *(Employee-owners are aware of the ESOP and its benefits. Onboarding new employee-owners includes ESOP education. Laying the foundation of an effective ownership culture.)*
- When is your stock price set?
- When are your annual statements distributed?
- Do you have busy/slow/significant time periods in your business cycle?
- Are there any significant company events during the year? *(celebrations, company-wide meetings, traditions, etc.)*
- Are there modes of communication that are especially effective for your employee-owners?

NCEO

COMMUNITY

CONVERSATION



# Bring It All Together: A Year Round Approach

## ONGOING EVENTS

- ESOP LMS Modules
- Monthly Volunteering Event
- EO Mentorship Programs
- Safety Bingo
- Suggestion Box/Ideas
- Monthly Update on Goals
- Employee Affinity Groups



MONTH	EVENT / MEETING	COMMUNICATION MODE	AUDIENCE	FOCUS / RESOURCE
JANUARY	Newsletter ESOP Participant Pinning 100% Vested Boxes CEO Fireside Chat + Goals	Written & Digital Public Event or Video Public, leave on desk, video, or mail home Video Recording	All Employees New ESOP Participants 100% Vested EO All Employees	Education, News Celebrations Celebrations Education, News
FEBRUARY	ESOP-IVERSAY PARTY Annual Employee Awards	In Person Event Video/Pictures Shared digitally (internal/external)	All Employees + Family All Employees	Celebrations Re-enforces Company Values
MARCH	New Hire EO Orientation	In Person + Virtual	New Employees	Education: ESOP, Culture, Community
APRIL	Newsletter Community Spring Clean Up	Written & Digital In Person: Pictures shared digitally (internal/external)	All Employees All Employees	Education, News, Celebrations Culture/Community
MAY	Food Truck Bike to Work Day	In-Person, Survey to get Food Voucher In-Person	All Employees All Employees	Feedback Culture/Community
JUNE	New Hire EO Orientation Trustee Training & ESOP Training	In-Person & Virtual In-Person & Virtual	New Employees ESOP Participants	Education: ESOP, Culture, Community

*This resource in your follow up for this webinar*



MONTH	EVENT / MEETING	COMMUNICATION MODE	AUDIENCE	FOCUS / RESOURCE
JULY	<ul style="list-style-type: none"> <li>• CEO Fireside Chat + Goals</li> <li>• Summer BBQ</li> <li>• GUESS THE STOCK PRICE</li> <li>• How to read a statement</li> <li>• Mock Statements</li> <li>• ESOP Participant Pinning</li> </ul>	<ul style="list-style-type: none"> <li>• Recorded, shared digitally</li> <li>• In-Person</li> <li>• Virtual</li> <li>• In-Person + Virtual</li> <li>• In-Person, One on One</li> <li>• Public Event + Video</li> </ul>	<ul style="list-style-type: none"> <li>• All Employees</li> <li>• All Employees + Family</li> <li>• ESOP Participants</li> <li>• ESOP Participants</li> <li>• Non-ESOP Participants</li> <li>• New ESOP Participants</li> </ul>	<ul style="list-style-type: none"> <li>• Education, News</li> <li>• Community + Culture</li> <li>• ESOP Education</li> <li>• ESOP Education</li> <li>• ESOP Education</li> <li>• Celebration</li> </ul>
AUGUST	<ul style="list-style-type: none"> <li>• Food Truck</li> <li>• Newsletter</li> </ul>	<ul style="list-style-type: none"> <li>• In-Person, ESOP Game to get Food Voucher</li> <li>• Written &amp; Digital</li> </ul>	<ul style="list-style-type: none"> <li>• All Employees</li> <li>• All Employees</li> </ul>	<ul style="list-style-type: none"> <li>• Culture/Community</li> <li>• Education, News, Celebrations</li> </ul>
SEPTEMBER	<ul style="list-style-type: none"> <li>• New Hire EO Orientation</li> </ul>	<ul style="list-style-type: none"> <li>• In Person + Virtual</li> </ul>	<ul style="list-style-type: none"> <li>• New Employees</li> </ul>	<ul style="list-style-type: none"> <li>• Education: ESOP, Culture, Community</li> </ul>
OCTOBER	<ul style="list-style-type: none"> <li>• EO Month Activities</li> <li>• Benefits Renewal</li> <li>• Halloween Costume Contest</li> </ul>	<ul style="list-style-type: none"> <li>• In-Person, Digitally</li> <li>• One on One Meetings</li> <li>• In-Person, Digitally</li> </ul>	<ul style="list-style-type: none"> <li>• All Employees</li> <li>• All Employees</li> <li>• All Employees</li> </ul>	<ul style="list-style-type: none"> <li>• Education: ESOP, Culture, Community</li> </ul>
NOVEMBER	<ul style="list-style-type: none"> <li>• Newsletter</li> <li>• Friends Giving Potluck</li> </ul>	<ul style="list-style-type: none"> <li>• Written &amp; Digital</li> <li>• In-Person</li> </ul>	<ul style="list-style-type: none"> <li>• All Employees</li> <li>• All Employees</li> </ul>	<ul style="list-style-type: none"> <li>• Education: ESOP, Culture, Community</li> </ul>
DECEMBER	<ul style="list-style-type: none"> <li>• New Hire EO Orientation</li> <li>• Winter Solstice Cookie Share</li> <li>• Decorate Your Work Space</li> <li>• Ugly Sweater Contest</li> </ul>	<ul style="list-style-type: none"> <li>• In Person + Virtual</li> <li>• In Person</li> <li>• In Person + Virtual</li> <li>• In Person + Virtual</li> </ul>	<ul style="list-style-type: none"> <li>• New Employees</li> <li>• All Employees</li> <li>• All Employees</li> <li>• All Employees</li> </ul>	<ul style="list-style-type: none"> <li>• Education: ESOP, Culture, Community</li> </ul>

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2	External Communication Goal:	-	-	-	-													
3	Fun / Inspiration Goal:	-	-	-	-													
4	Engagement / Innovative Ideas Goal:	-	-	-	-													
5	Other Goal:	-	-	-	-													

PROJECT END

# Polling Question 3

What would make the BIGGEST impact on your ownership culture in the next 6 months?

- a) Ready-to-use communication materials for employee-owners
- b) Learning from peer connections with similar companies
- c) Getting more training on ownership culture
- d) Toolkit of ideas and proven strategies to use at your company
- e) Measurement tools and benchmarking for engagement at your company
- f) One-on-one coaching



# Takeaways

**Start.**

**Start now.**

**Start where you are.**

**Start with what you have.**

**Start with all your insecurities.**

**Start with what you already know.**

**Start moving towards the goal.**

**Start and make mistakes.**

**Start small.**

**Start now.**

**Just Start.**



# Takeaways

- Resource Reminders
  - Strategies for Maintaining Engagement Year Round with sample calendar
    - PDF in follow up email for this webinar
  - The NCEO Member Download
    - Ready-made communication materials for employee-owners
  - The NCEO EO Month Toolkit
    - Includes EO Month Checklist and more on how to mix celebration with education
- For Inspiration and Support
  - Innovative Communications Coalition Peer Network
  - HR Peer Network
  - NCEO Publications
    - The ESOP Communication Committee Guide
  - NCEO Member Exclusive Webinars
    - Recorded replay: Communicating your New ESOP



# THANK YOU



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