Planning Tips for the Best Employee Ownership Month Ever



 Grace Dawson | Ramona Rodriguez-Brooks | Deana R. Haworth | Amanda Clark

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 BLACK & LOUX ENFLOYEE-OWNED

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Learning Objectives

- 1. Learn about effective communication techniques to increase employee participation and enthusiasm throughout ownership-focused events
- 2. Discuss educational strategies that make complex ownership concepts accessible and engaging for employees at all levels throughout the year.
- 3. Discover ideas for a strategic EO Month planning framework that aligns celebrations with your company's ownership culture goals.

Welcome & Housekeeping

Speaker Introductions

Polling Question 1

What size is your company?

A. Small (1-100 employees)B. Medium (100-500 employees)C. Large (1,000+ employees)

Polling Question 2

What is your company's ESOP age?

A. 0-2 years
B. 2-5 years
C. 5-10 years
D. 10+ years
E. We are not yet an ESOP

Chatterfall!

Pain points in EO Month planning

Specific learning interests and challenges





Year-Round vs. Employee Ownership Month-Focused Strategies

- BV approach: Annual calendar with October education focus
- Hirons approach: Dispersed celebrations throughout the year
- Framework development: Starting with goals and building backwards

Polling Question 3

Is this your first time celebrating EO Month?

A. Yes
B. No, we've celebrated once
C. No, we've celebrated more than once
D. No, we've never celebrated

Current celebration approaches



Successful Event Examples

- Hirons approach:
 - Founder's Day off-site experience
 - Founder's Month Culture Building Spirit Week activities and engagement leading up and following Founder's Day
 - ESOP Brunch with the Board (Pi Day!)
- BV approach:
 - Dispersed workforce: how BV handles multiple groups nationwide/worldwide

Hirons' Approach: Founder's Day



Hirons' Approach: Founder's Day



Hirons' Approach: Founder's Month Culture Building

Spirit Week activities and engagement leading up (and following) Founder's Day

- "Caffeine Kickoff" Monday
- Taco Tuesday
- "Where'd You Go" Wednesday
- "Think Green" Thursday
- "Donuts & Deadlines" Friday



Hirons' Approach: Founder's Month Culture Building Spirit Week activities and engagement leading up and following Founder's Day



Hirons' Approach: ESOP Brunch with the Board

- ESOP Eggs, Sausage, Orange Juice and Pancakes
- Hirons board member engagement
- Pi Day!



BV Celebrations

- Annual Owners' Meeting
 - Two-day all-company event (mornings)
 - Hybrid event (attend live in KC, attend virtually via watch parties outside KC)
 - Day 1 Reflect on the year (where we've been)
 - CEO keynote and strategy update
 - Safety keynote
 - Wins and opportunities
 - CFO keynote and stock price reveal
 - Day 2 Looking toward the future (where we're going)
 - Strategy for the future
 - Conversations with leaders across the business
 - Employee-owner highlights, awards and recognitions
 - Engagement event at HQ

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BV Celebrations

- Employee-owner engagement events throughout the year
 - People Conference 0
 - Kick-off to summer at HQ Ο
 - Fall Fest at HQ Ο
 - Dog Days Ο
 - Regional engagement events Ο
 - Pickleball
 - Cycling
 - Corporate Challenge
 - Holiday parties
 - Vesting celebrations 0



BV's EO Month

- Q&A Events for both ownership plans
- Social campaign on intranet (#weownit)
- Engagement events (KC and regional)
- Vesting celebrations (KC and regional)
- Gamify educational content
 - Family Feud
 - Jeopardy
 - \circ Crosswords
 - Kahoots

Communication and Marketing Strategies



Hirons' Approach: Telling the ESOP Story

- All communications should start with research
- ESOP-oriented questions in the internal annual employee-owner survey
- Research findings become a baseline
- NCEO: The Ownership Culture Survey

Hirons' Approach: ESOP Messaging

100% Employee Owned

Welcome to Hirons. This firm is unlike most others you are likely to work with or visit. Our firm is an ESOP and is owned by its employees.

Our stock was placed in trust by our founder, Tom Hirons. Ownership in the value of the stock is distributed annually to all qualified employees at no cost to them.

istributed annually to all qualified employees at no cost to them

Whomever you interact with today will likely be an owner.

What does this mean to you?

You are talking to someone who can get things done.

You are talking to someone who cares about your experience and your satisfaction. You are talking to someone who can fix problems, make commitments and carry through with any promises. If you are interviewing for a job, you are talking to someone who is not just looking to make a hire but also to select a future fellow owner. You are talking to the owner.

BE BOLD.

Hirons' Approach: Concentric Circles



Hirons' Approach: Target Audience Identification

Internal Audiences	External Audiences
Board of Directors	Clients
Management Team	Vendors
Supervisors and Senior Leaders	Partners
Employee-Owners	Universities/Colleges
New Hires/Pre-Owners	Social Followers
Interns	Potential Clients
Retirees	Potential Team Members
Former Employees with Unpaid Stock	Friends/Family/Advocates
Former Team Members and Interns who are not	Media
vested	Other Geographically Relevant ESOPs

Hirons' Approach: Internal Communications

- Biannual Owners' Meetings
- Monthly Newsletter
- Performance Recognition Plan
- Merchandise program
- Dog-friendly
- Themed events/competitions
- Friday breakfast
- Friday Fun

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Hirons' Approach: Internal Communications

- ESOP Communications Committee
- Employee-Ownership Culture
 - ESOP member money tree
 - 100% vested vests
 - ESOP breakfast
 - Trustee training
 - October ownership month recognition



Hirons' Approach: External Communications

- Office Signage
- Website
- Blogs
- Social Media
- Collateral Materials
- Agency Tours

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Community Engagement



Empowering Our Team Through ESOP

An ESOP is an employee benefit plan designed for employees to have a stake in their company's ownership. ESOPs not only provide an incentive for employees but rewards them for their hard work and dedication in pursuit of a company's achievement. At Hirons, after qualifying for participation in the ESOP and six years of participation, employee-owners hold 100% of their share value, which is re-evaluated annually by a third-party administrator.

Reaching Diverse Workforces

- Different workforce type (office vs. field vs. floor, etc.) engagement techniques
- Multi-channel communication approaches
- Ambassador network utilization (BV model)



BV's Communications

- Internal Communications
 - Employee ownership threaded through all communications how is what we are communicating impactful for you as a BV employee-owner
 - Employee Ownership site
 - We Own It, Let's Grow It
 - BVconnect stories, announcements
 - Viva engage posts
 - Emails

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- External Communications
 - Project wins/celebrations
 - Safety shoutouts

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Employee-owner spotlights





Building meaningful relationships across teams and continents.

#EMEA proposal director Darren Buchan uses his interpersonal and time management skills to succeed in his role and help our company thrive.

Meet Darren below. Then head over to our #careers page to explore #OpenPositions: http://ms.spr.ly/6041SQ9fB



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Employee Ownership Ambassador Network

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BACKGROUND



Employee Ownership Relations requested recommendations for the network from leaders across BV, then met 1:1 with nominees to gauge investment and belief in the culture of employee ownership and desire to propel that forward



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	The purpose of the Employee Ownership Network is to advocate for	15 U.S. Regional Office Ambassadors in 12 states		Qua
	and promote Black & Veatch's ownership culture to encourage	28 KC Ambassadors		
	ownership thinking and behaviors with the goal of transforming all	26 OUS Ambassadors in 8 countries		mee
	professionals into engaged employee- owners who drive company growth.	*Represent almost all functional areas and plan eligible regions at BV	•	Foc
and have been a	OUR WHAT	Ambassador Network Lead		Δ
n - Charles and -	Engaging	Employee Ownership Relations		Ann
	 Motivate employee-owners to make de financial performance (owner mindset) 			Sur
	 Support BV behaviors and embed value 	s to strengthen our culture		Surv
	 Integrate employee ownership messagi initiatives 	ng in all communications and		Edu
	Educating			Luu
June and V	 Explain BV's employee ownership plans Develop the business and financial acu 			eve
m har the	Highlight every employee-owners' impa			eve
	 performance Illuminate the connection between deci 	sions we make, BV		FO
	 performance and ownership value Share financial drivers and performance 	٩		LO
		~		Vest
	Celebrating Promote employee ownership pride		•	
	Encourage employee-owner connection Enhance employee engagement	IS		cele
1/	Celebrate employee-owner milestones			
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OUR WHY

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- Annual Summit in January
- arterly etings
- cus Groups
- nual EO rvey
- ucational ents
- Month leads
- sting ebration leads

Polling Question 4

Do you have a communications committee, group, or person who is tasked with encouraging ownership culture and ESOP understanding? Is this a formal or informal role?

A. Yes, formally dedicatedB. Yes, but informallyC. No dedicated resource

Cultural Identity Integration

- Cultural identity tie-in examples (business certifications, family impact messaging)
- Women-owned business highlighting (Hirons)
- Community impact messaging
- "Changing family trajectory" narratives (BV)

Women-Owned Business Highlight (Hirons)

- Certifications
- Sponsorships
- Partnerships
- Community involvement
- Social media

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BV - Find Your Why

- What does employee ownership mean to you personally
- How are you connecting to ownership
- Our employee-owners share their stories of what ownership means to them, what drives them to show up everyday with an ownership mindset



Stock Price Reveals and Financial Communication

- Different approaches to financial transparency
- Timing and presentation considerations
- What works and what doesn't

Wrap-up and Resources

Resource Distribution

- NCEO EO Month Guide access for registrants
- Ownership culture survey tools
- Contact information for follow-up consulting (outside webinar context)



Get in touch with us!







DHaworth@hirons.com



Grace Dawson | Ramona Rodriguez-Brooks | Deana R. Haworth | Amanda Clark NCEO NCEO **BLACK &** HIRONS

gdawson@nceo.org

ramona@nceo.org



ClarkAC@bv.com