

Planning Tips for the Best Employee Ownership Month Ever



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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

- Hiron 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



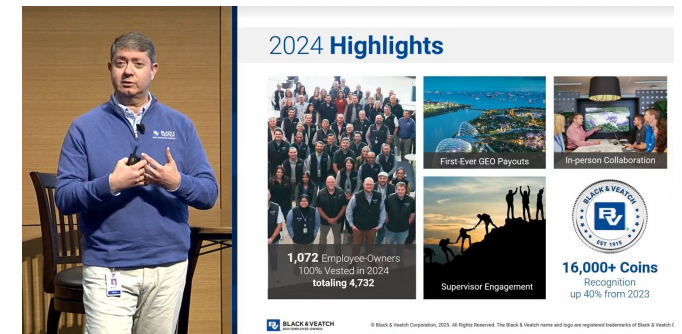
Hirons' Approach: ESOP Brunch with the Board

- 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



BV Celebrations

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



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
 - 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.

Whoever you interact with today will likely be an owner.

What does this mean to you?

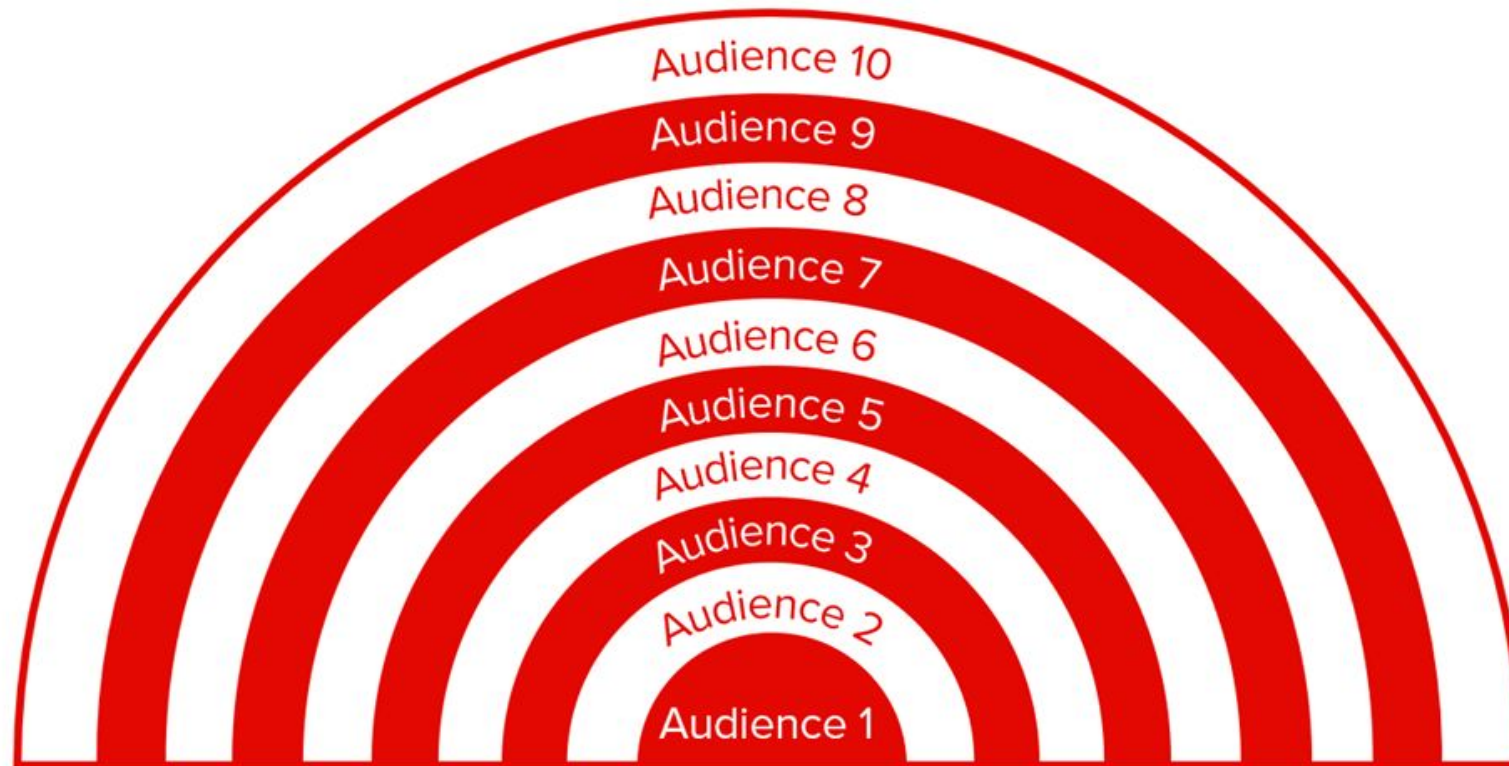
You are talking to someone who can get things done.

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

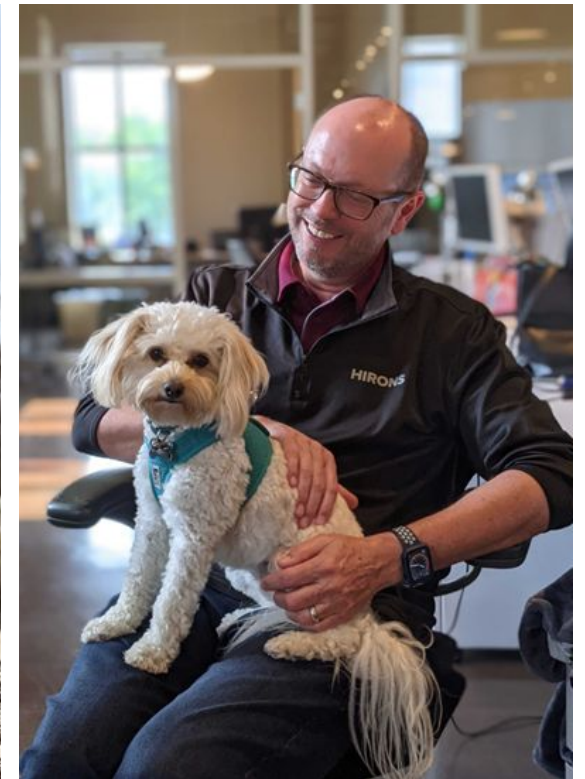


Hirons' Approach: Target Audience Identification

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

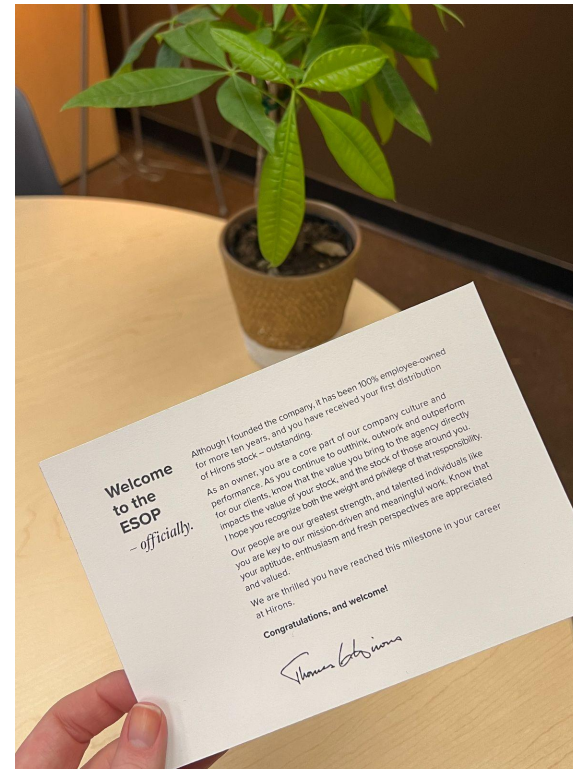
Hirons' Approach: Internal Communications

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



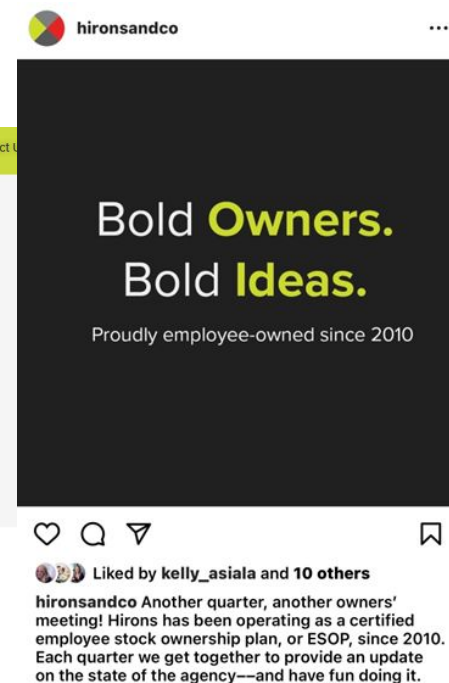
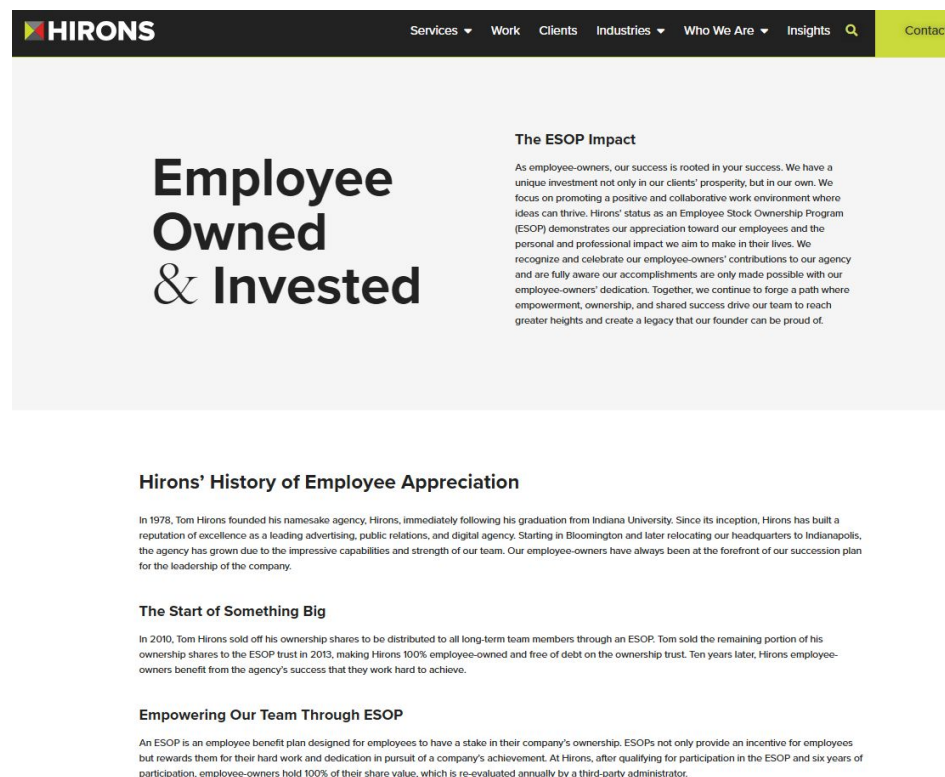
Hirons' Approach: Internal Communications

- 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
- Community Engagement





Reaching Diverse Workforces

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

Doing business like
#WeOwnIt
because we do.

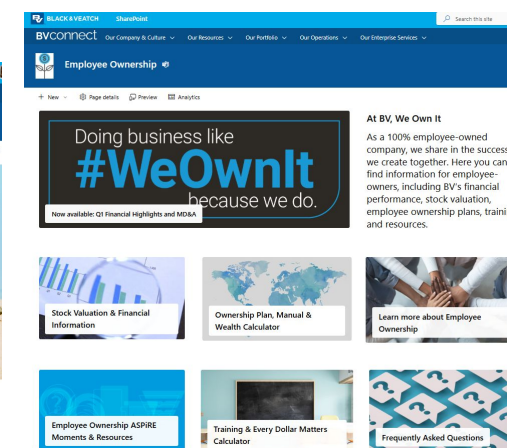
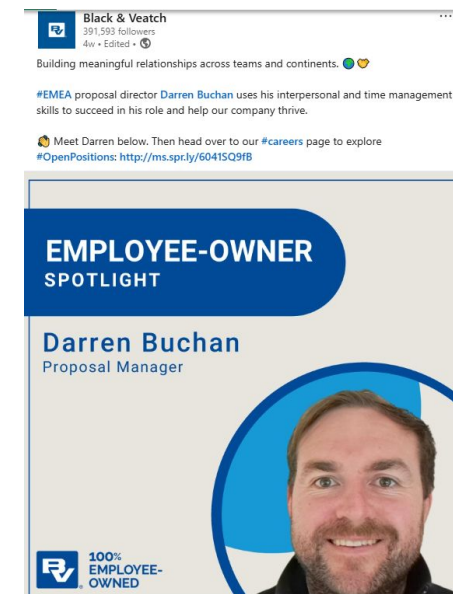
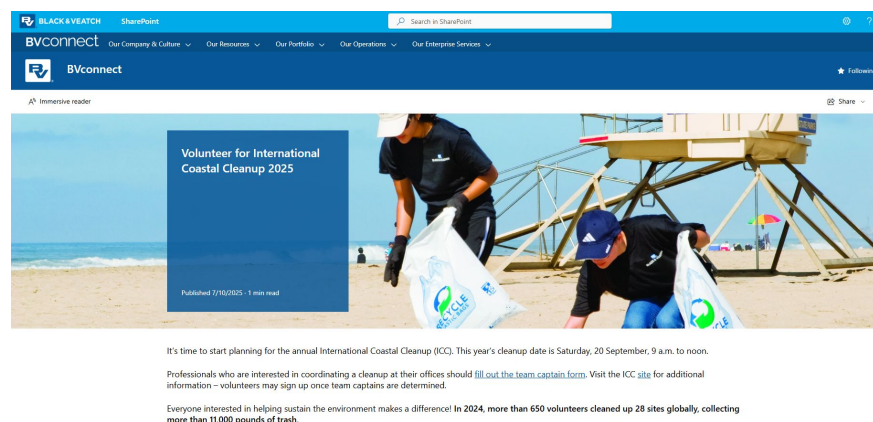
BV's Communications

- 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

- External Communications

- Project wins/celebrations
- Safety shoutouts
- Employee-owner spotlights





Employee Ownership Ambassador Network



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- Annual Summit in January
- Quarterly meetings
- Focus Groups
- Annual EO Survey
- Educational events
- EO Month leads
- Vesting celebration 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 dedicated
- B. Yes, but informally
- C. 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



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!



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