ARCHITECTURE & ENGINEERING •
EMPLOYEE OWNERSHIP TRUST

NCEO | NATIONAL CENTER FOR EMPLOYEE OWNERSHIP

Guidon Design, Inc.

We Own Our Work. Veteran- and Employee-Owned.

85+
Employee-Owners

2025
EOT Established

$23.5M
Annual Gross Revenue

~$145K
Professional Fees to Convert

30%
Employee-Owned

2011
Founded

The Journey to Employee Ownership

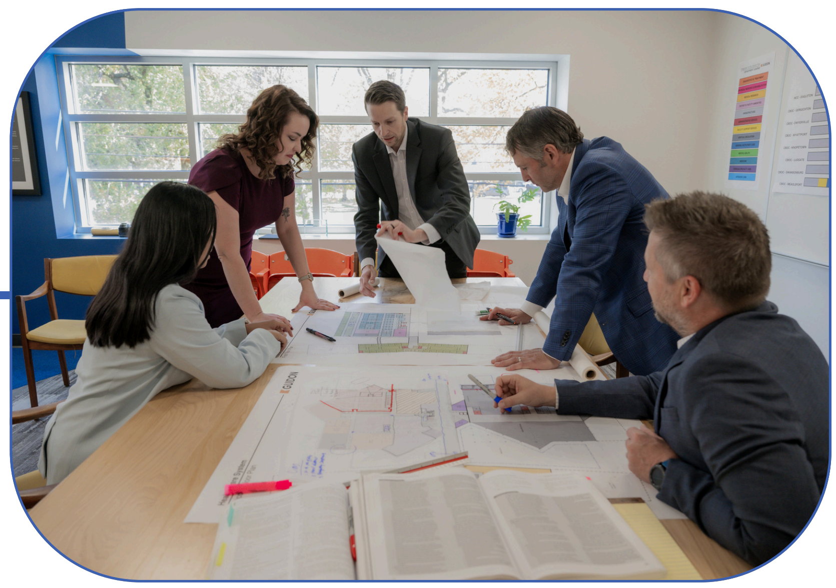
2021
The Challenge

As Guidon matured, founder Luke Leising took intentional steps to empower leaders across the firm and to establish a strong foundation for long-term stability. Through this process, it became clear that the company needed a sustainable ownership plan—one that would protect its mission, culture, and independence well into the future.

Luke began to explore potential pathways for succession and continuity, including possible buyers. However, traditional sale options posed a significant risk: selling to a larger firm or private equity group could jeopardize Guidon's values, its collaborative culture, and the legacy it had built as a purpose-driven, community-aligned, veteran-led organization.

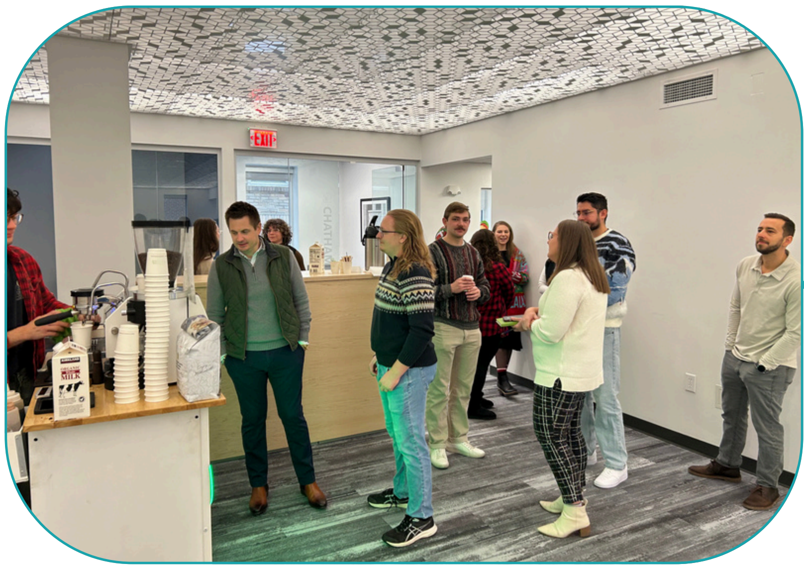
The central challenge became clear: How could Guidon craft an ownership transition that preserved its identity, ensured long-term independence, and kept the value created by its people within the company?

This question ultimately led to the exploration of employee ownership as a model capable of safeguarding Guidon's purpose, protecting employees, and maintaining the continuity clients rely on.



2023
Exploring EO

While reviewing long-term ownership options, Luke initially explored an employee stock ownership plan (ESOP) structure. During this process, he learned about the employee ownership trust (EOT) model at a conference. The EOT stood out because it offered a clearer path to protecting Guidon's legacy, required fewer administrative and regulatory burdens than an ESOP, and allowed employee financial benefits to be delivered more quickly. These advantages made the EOT an attractive option for sustaining Guidon's values, stability, and employee-centered culture.



2025

Implementation

Internally, Guidon's general counsel led the transaction with heavy support from the COO, plus HR and Marketing from the start. Externally, the company worked with Common Trust (EOT consultant), Bill Friedman at Everbridge Law Group (trust attorney), Brian Heaton at Krieg DeVault (corporate counsel), CliftonLarsonAllen (accounting), a licensing professional, and an SBA attorney.

Guidon spent approximately $145,000 on outside professionals and support. Luke notes this is likely still less than an ESOP transaction—plus an EOT carries no ongoing ESOP fees—though Guidon's process was a bit more complex due to licensing and SBA compliance.

Luke maintains that using an EOT consultant was absolutely necessary, providing critical guidance at every step and keeping all parties on the same page. The consultant also introduced Guidon to its trust attorney, who was instrumental along the way.

Challenges arose, too: the trust attorney switched firms before the process even began, costing time, and every decision had to be run by multiple consultants—a "good thing," Luke notes, but a slowdown. The process took 11 months versus the six he'd envisioned. Still, Guidon's leaders agreed they'd rather get the EOT right than rush it.

In early 2025, ahead of finalizing its EOT, Guidon began employee education—legal and financial training built around an "ownership mindset." The COO and general counsel developed materials internally, drawing on content from Common Trust. After closing, Guidon hosted a day-long "Owners Day" for further education, and has since adopted "We Own Our Work" as its mantra.

2026

Current Success & Vision

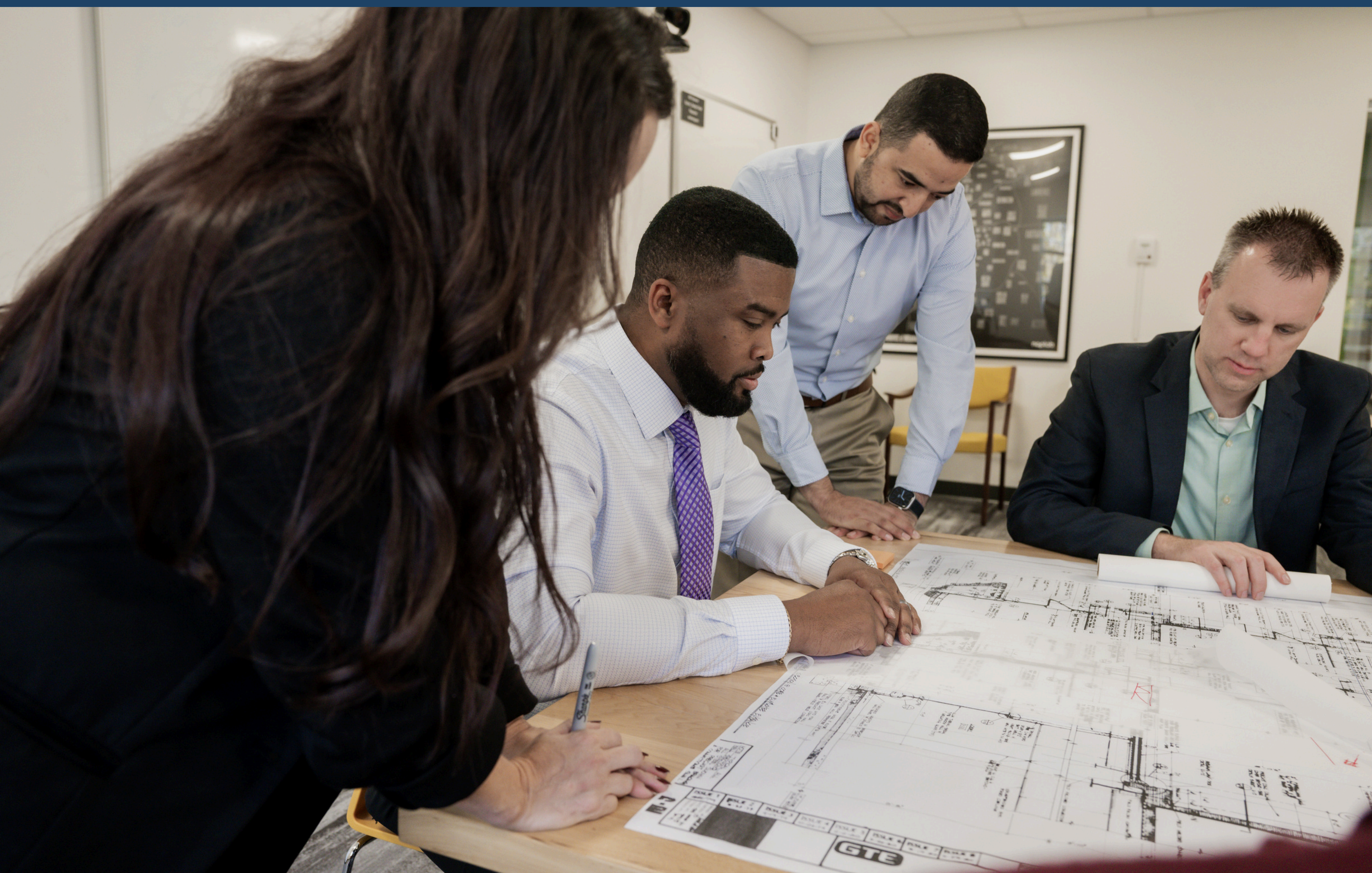
Though Guidon has not been an EOT for very long, it can reasonably expect profit sharing in 2027. The entire company is embracing the idea of employee ownership, and the leadership team knows that the first profit-share opportunity will continue to drive home why they chose an EOT for the business.

Guidon intentionally weaves EOT messaging into its State of the Union, companywide meetings, and leadership gatherings, in addition to tying the company’s 4 Core Behaviors back to the EOT. The leadership team envisions a future state in which all employees live by the “We Own Our Work” motto and feel a sense of responsibility to the company. When the timing is right, the company also looks forward to a transition to 100% employee ownership.

"Employee ownership makes our mission real. When people have true ownership, they're not just doing the work; they're shaping it. They're growing their careers with intention, making meaningful decisions, and seeing the direct impact of their contributions. That kind of ownership empowers people and supports better lives, both inside and outside of work."

Chris Guess

Director of Human Resources, 4 years with Guidon



The Impact of Employee Ownership

Culture & Engagement

Greater Clarity & Transparency

Employees now have access to more financial and strategic information through the profit-sharing structure, which has improved conversations around performance and outcomes. This transparency supports better alignment between teams.

More Consistent Communication

The transition included regular town halls, internal updates, and a structured rollout plan, which helped ensure employees understood the transition and how it affected their roles. This has led to stronger communication habits throughout the company.

Reinforced Culture & Values

Guidon emphasizes behaviors such as proactive problem solving, following through on commitments, and collaboration. The EOT strengthens these expectations because employees now see how these actions impact overall success.

Improved Engagement Through Governance

Eligible employees participate in electing members of the Trust Stewardship Committee, giving them a real voice in major ownership-related decisions. This has expanded the sense of participation and ownership across the firm.

Business Performance

Long-Term Stability

The EOT model shields Guidon from short-term outside pressure, helping the company stay focused on profitability over multiple years rather than quarter-to-quarter fluctuations. This stability supports stronger operational performance.

Quality & Innovation, Supported by Engagement

Employee engagement and profit sharing help drive retention and commitment, which improves consistency on projects and strengthens Guidon's ability to deliver high-quality work.

Improved Client Experience

Guidon highlights that employee ownership enhances collaboration, accountability, and responsiveness for clients because the people doing the work have a stake in its success. This continuity helps maintain strong, long-term client relationships.

Innovative Practices

Unique Governance Structure

Guidon's Trust Stewardship Committee blends founder representation, employee-elected seats, and executive leaders. This gives employees real influence on existential decisions without overlapping with day-to-day operations.

Structured Communication Tools

Guidon created an EOT Handbook, a Profit Sharing Guide, internal newsletters, and training sessions to help employees learn how the trust works and how profit sharing is determined. These resources serve as ongoing, accessible education.

Regular Training & Engagement Programs

The company uses "Lunch & Learns," ongoing EOT education sessions, microlearning campaigns, and themed events like Owners Day to build an ownership mindset.

Clear Grievance & Engagement Processes

Employees can provide structured feedback or raise concerns about alignment with the trust purpose, ensuring transparency and accountability within the ownership model.

Retention & Growth

Employee-Centered Value Proposition

Guidon highlights that the company will remain independent and stable through the EOT, making it a more attractive workplace for employees seeking long-term careers.

Profit Sharing as a Retention Tool

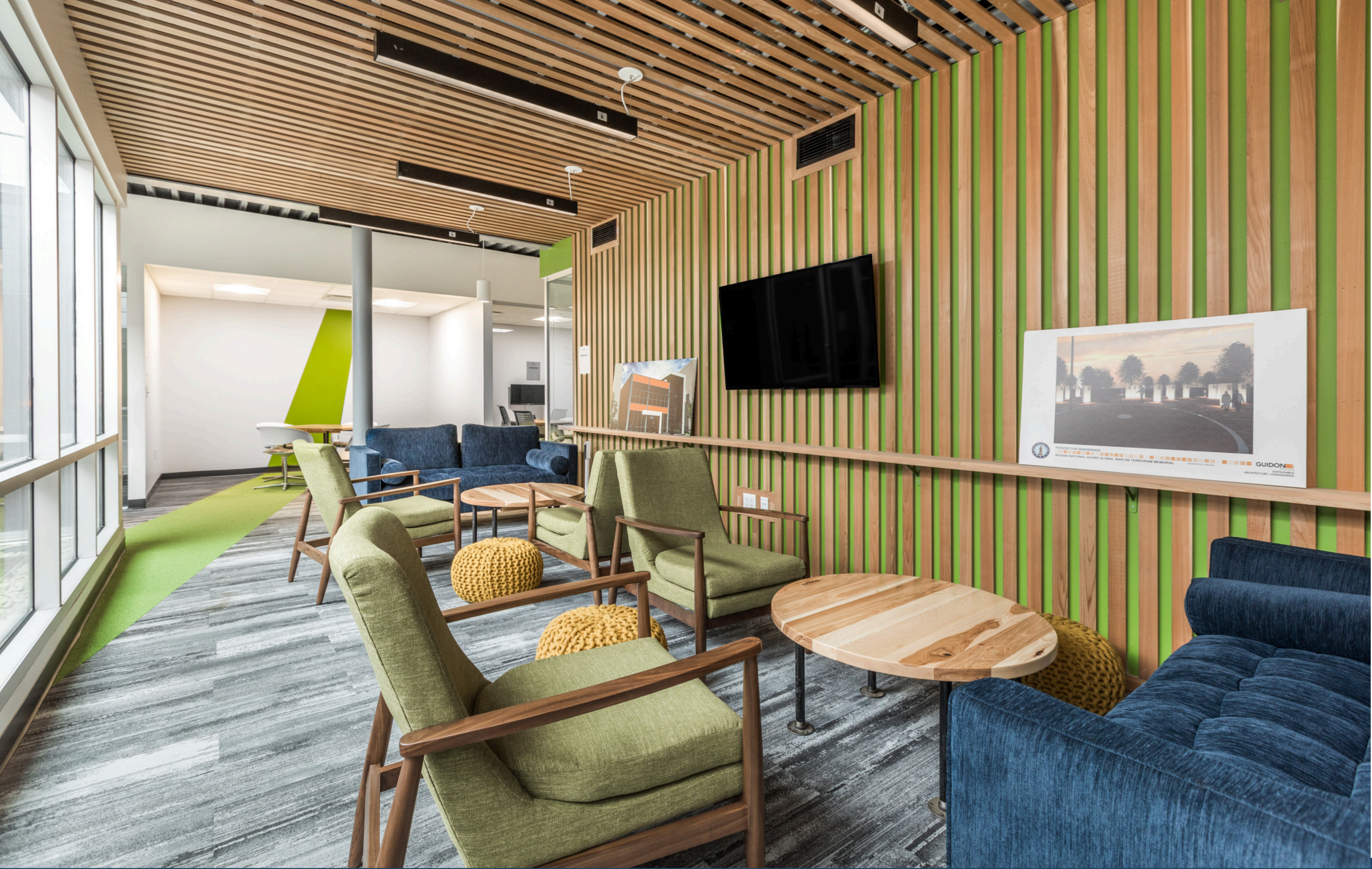
Because employees receive economic benefits only while employed at Guidon, the structure encourages long-term commitment.

Leadership Continuity as a Recruitment Advantage

Guidon emphasizes that the same leaders and teams remain in place, signaling stability to clients and new hires while maintaining confidence among existing staff.

Employer Brand

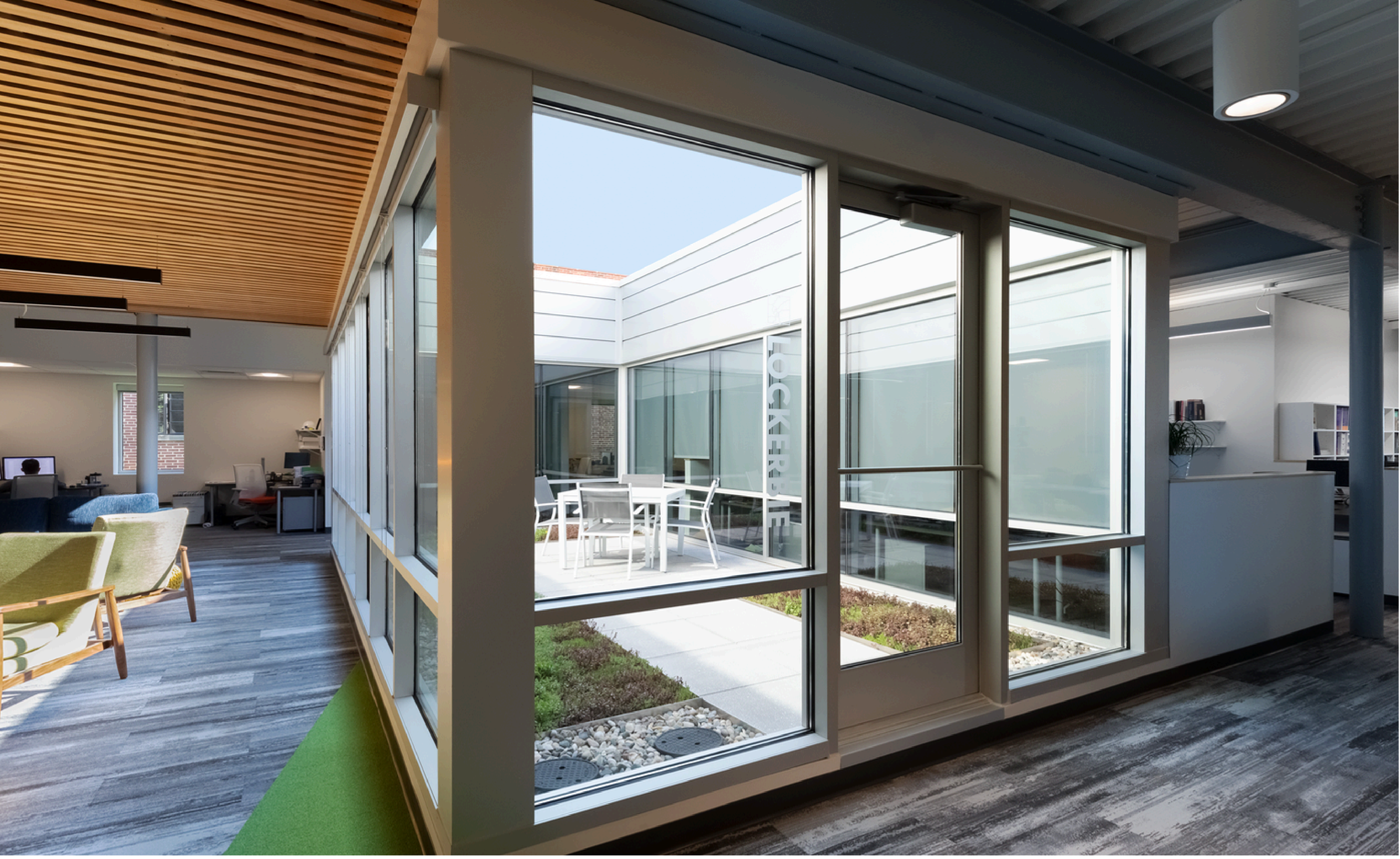
Public messaging in the press release and communications materials positions Guidon as the first business in Indiana to adopt an EOT, reinforcing an image of innovation and purpose-driven leadership—an advantage for talent attraction.



"The Guidon Employee-Owned Trust ensures that the people helping build our future have a meaningful stake in it. As Guidon grows and transitions to future generations of leadership, the EOT allows us to preserve our identity, invest in our employee-owners, and continue creating a lasting impact in our communities through design."

Chris Ward

Chief Operating Officer, 9 years with Guidon



Top Three Takeaways

Protect Your Legacy, Not Just Your Payout

An exit isn't only a financial event—it's a decision about who carries the company's mission forward. A structure that maximizes short-term value but risks a future sale to private equity or a larger competitor can undo decades of culture building in a single transaction.

Getting It Right Beats Getting It Fast

Ownership transitions involve legal, financial, and regulatory complexity that rarely fits a compressed timeline. Building in extra time for outside experts to vet each decision is often the difference between a transition that holds up and one that creates problems down the road.

Ownership Education Is a Continuous Investment

Employees won't feel like owners just because a legal structure says they are. Training on what ownership means—started before the transition closes and reinforced through events, meetings, and everyday language afterward—is what turns a legal change into a lasting cultural shift.

Learn how your company could benefit from an EOT transition. Contact the NCEO's technical content manager, Matthew Licina, at mlicina@nceo.org.

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