



EMPLOYEE ENGAGEMENT RUBRIC



2024
NCEO
EMPLOYEE OWNERSHIP CONFERENCE
APRIL 29 - MAY 1

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