



EMPLOYEE OWNERSHIP ACTION NETWORK

Campaign Toolkit

Table of Contents:

- Welcome Letter from The ESOP Association 2
- About the Employee Ownership Action Network (EOAN) 3
- EOAN Alert Sample 4
- Simple Steps to Run an EOAN Campaign 5
- Ways to Communicate About EOAN 6

**TAKE THE FIRST STEP—
SIGN UP FOR EOAN RIGHT NOW**





Dear TEA Member,

Your ESOP is important – it's not just your retirement account, it's a tool that helps your company and workforce succeed and one that can help strengthen our communities. The ESOP Association believes they should be protected, preserved, and promoted for both current and future generations. That's why we have Advocacy efforts at the federal, state, and local levels, and are sharing this helpful toolkit with your ESOP company or firm.

Employee ownership concepts and models date back to our country's birth, but ESOPs as we know them were largely created by the federal government starting in the 1970s. Federal regulation and tax treatment are their foundation, so ESOPs succeed when federal policies are clear, favorable, and commonsense. But ensuring public policy success takes a concerted effort – advocacy -- and that effort includes employee owners like you.

Advocacy relies on several factors, but grassroots support and activity are key. Therefore, The ESOP Association created the Employee Ownership Action Network (EOAN). The Employee Ownership Action Network is the employee ownership community's grassroots army of employee owners and professionals fighting to protect ESOPs. By signing up you will receive important alerts when something arises that could impact your ESOP, and then be connected to your lawmakers so you can use your voice. If you care about your ESOP and are willing to share a little bit of time every now and again, then EOAN is your vehicle to help make a difference.

Best of all, EOAN is free and simple to join. Just sign up with your home address and then take action when needed. By growing EOAN, we grow the grassroots effort necessary to protect the ESOPs we have and promote and expand employee ownership for the future.

The attached toolkit of EOAN resources will help generate support for EOAN in your company or firm, and TEA staff are ready and willing to help you tailor these valuable resources to your needs. I hope you'll take the time to share this important information with fellow employee owners. Thank you for your support.

Sincerely,

A handwritten signature in blue ink that reads "Gregory Facchiano". The signature is written in a cursive style.

Gregory
Facchiano

Vice President of Government Relations and Public Affairs



ABOUT EOAN

The Employee Ownership Action Network (EOAN) is a free-to-join, grassroots advocacy movement for anyone with a stake in ensuring employee ownership continues to grow and thrive in the US.

What is Grassroots Advocacy?

When we say grassroots advocacy, we are talking about making it easy for individuals in the ESOP community to connect with your policy makers.

Membership gives you the unique opportunity to promote the value of employee ownership to the people with the power to affect change on a large scale.

EOAN works to ensure that matters affecting employee ownership are communicated to policymakers by individuals in the ESOP community.

Why it Matters

Lawmakers want, and need, to hear from you and they respond to stories and messages from the people they represent. EOAN provides a unified and energized voice for our community with elected officials and creates dialogue for future issues. EOAN provides you with the information and tools you need to be an active participant on state and federal level.

How it Works

As an EOAN member, you will be provided real time advocacy alerts on issues impacting our community. In many cases we will send you an email, where you can follow a few simple steps to immediately generate a message from you to your elected official.

Successful grassroots advocacy starts with the individual. This Network was built to work for you and is quick, easy, and effective!

Get Started

Sign up now at esopassociation.org/eoan and encourage your colleagues and others in the ESOP community to join as well!

All members are required to renew registration annually to retain benefits. We will notify you if your membership is about to expire. By responding to an EOAN alert, opening an email from EOAN, registering for The ESOP Association's Advocacy Academy, you are agreeing to renew your membership to EOAN for one year from the date of action.

To terminate please email esopadvocate@esopassociation.org.

EOAN Member Benefits

- Real-time breaking news alerts: stay on top of the latest legislative and regulatory changes impacting Employee Ownership.
- Fast and effective communication with leaders in state and federal government.
- Quarterly policy updates from TEA's Expert Advocacy Team
- Access to exclusive learning and training opportunities



EOAN Call to Action



Share Your Story

You, a member of the ESOP community, are the strongest and most reliable advocate for employee ownership. Your members of Congress need to hear from you and more importantly they need to know you exist.

The goal here is simply to identify yourself as a constituent and a supporter of employee ownership who can be a resource for questions about legislation impacting employee-owned companies, like yours.

Below we have given you the ability and a template to send an email to your Members of Congress. Introduce yourself, your company, and make sure to tell them how being an ESOP sets you apart from other companies in their district or state.

Sample Template:

My name is [first, last] and I am an employee owner at [company], headquartered in your district. I am lucky to say I am an employee owner, because our company has an Employee Stock Ownership Plan (ESOP), meaning we all have a stake in the success of our business.

[Introduce your company here. Where are you headquartered? how many employee owners do you have? What about being employee owned makes your company unique? How does your ESOP benefit the community – job retention, retirement savings?]

How to make your introduction:

1. **Confirm your information.** To ensure your Representatives receive the message below, please confirm your home mailing address and phone. Use your home email address so your Representatives know that you and your business are in their state. Click the "Show Me My Officials" button to refresh the list of Senators who will receive your message.
2. **Customize and add Your Personal Message.** Use the template above to introduce yourself, your company, and make sure to tell them how being an ESOP sets you apart from other companies in their district or state. Feel free to add information like your location and number of employees.
3. **Send your message by clicking the Send My Message button.** This will send your email to both of your Senators and Members of Congress.

Thank you!

Your Information [click here for blank form](#)

** All fields are required to ensure we can deliver your message directly to your elected officials.*

| | | | |
|---|--------------------------------------|--|------------------------------------|
| * Prefix <input type="text" value="--None--"/> | * First Name <input type="text"/> | * Last Name <input type="text"/> | |
| * Street Address <input type="text"/> | * City <input type="text"/> | * State <input type="text" value="Alaska"/> | * Zip Code <input type="text"/> |
| * Email Address <input type="text"/> | | * Phone Number <input type="text"/> | |

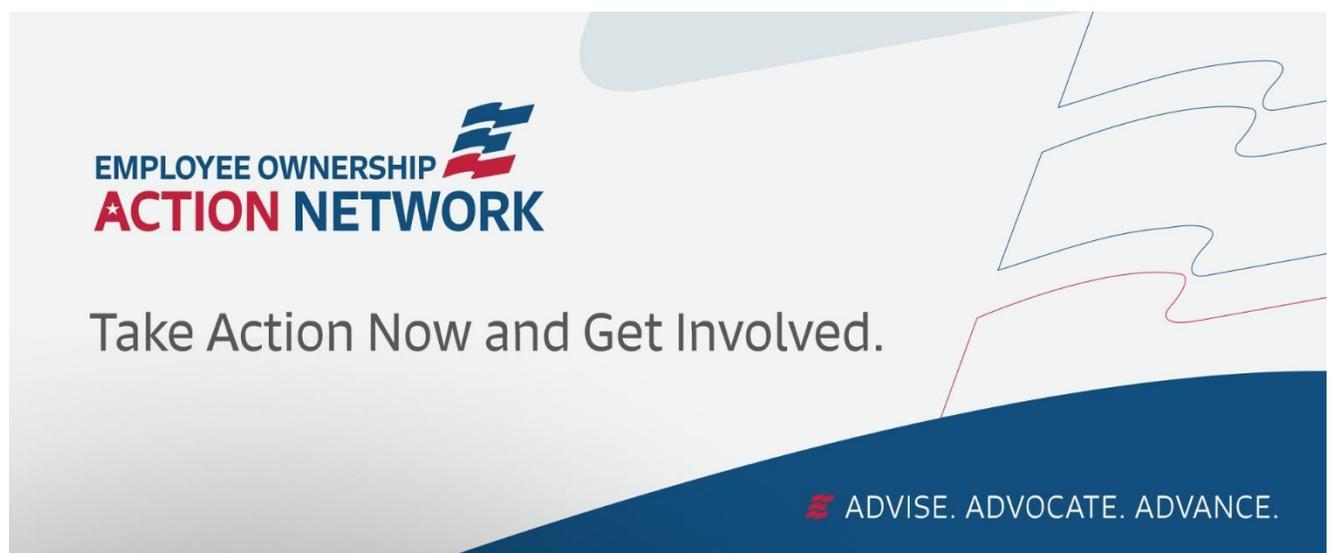


Simple Steps to Run a Successful EOAN Campaign

- **Make Your Plan**
 - Download EOAN graphics and sample communications to share.
 - Make a roster to identify who you are reaching out to for easy follow up.
- **Launch Your Campaign**
 - Email ESOP participants to join/renew EOAN membership.
 - Track those who tell you they will sign up.
 - Personally call or email those who haven't.
- **Be available for questions**
 - Not sure how to answer? Email esopadvocate@esopassociation.org for help.
- **Act when you receive an EOAN alert**
 - This is the most important part, and it only takes a few minutes!

Enrollment Ideas

- Schedule a meeting or give a short explanation on advocacy and the Employee Ownership Action Network.
- Contact The ESOP Association staff and have them conduct a webinar for your company.
- Host a company lunch and have your colleagues sign up for EOAN at the door.
- Have a booth at your next corporate event, contact The ESOP Association for handouts and other promotional materials.





Ways to Communicate About EOAN

PowerPoint Presentations

We have developed a sample PowerPoint presentation that you can use to introduce EOAN to your fellow employee owners and ESOP professionals. The presentation is available by request, please contact esopadvocate@esopassociation.org.

Sample Social Media Post

- Want to stay up to date on issues affecting ESOPs? Join EOAN, The ESOP Association's free grassroots network at esopassociation.org/eoan.
- Speak up when Congress is considering bills that would affect your ESOP and future ESOPs. Join EOAN today! esopassociation.org/eoan
- The Employee Ownership Action Network is a free-to-join, grassroots advocacy movement for anyone with a stake in ensuring employee ownership continues to grow and thrive in the US. Join today esopassociation.org/eoan
- I have contacted my elected officials and spoke about issues affecting my ESOP. You can too at esopassociation.org/eoan

Sample Email Text:

Dear Colleague,

The ESOP Association advocates every day on behalf of our ESOP and the nearly 11 million employee owners in the nation. They work for us by advocating for policy initiatives that strengthen our ESOP and for the ability of business owners to sell to their employees and allow employees to have an ownership stake in their business.

I am reaching out to encourage you to join the Employee Ownership Action Network (EOAN) and speak up about policies that could impact our ESOP.

The Employee Ownership Action Network (EOAN) is a free-to-join, grassroots advocacy movement for anyone with a stake in ensuring employee ownership continues to grow and thrive in the US. It's simple to join and will help us stay informed on issues that could impact our ESOP.

Please register today by visiting esopassociation.org/eoan.

