

# EMPLOYEE OWNERSHIP ACTION NETWORK

THE ESOP ASSOCIATION MEMBER

# GRASSROOTS TOOLKIT



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TAKE THE

## FIRST STEP

Join EOAN by simply scanning with your smart phone or visit:



[esopassociation.org/eoan](https://esopassociation.org/eoan)



The ESOP Association Government  
Relations & Public Affairs  
[esopadvocate@esopassociation.org](mailto:esopadvocate@esopassociation.org)

Updated Jan. 8, 2025

Dear Member of the ESOP Association,

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)**. EOAN is the employee ownership community's grassroots army of employee owners and professionals fighting to protect ESOPs. By signing up you will receive important email alerts when something arises in government that could impact your ESOP. You are then automatically connected to your lawmakers so you can easily send them a message. If you care about your ESOP and are willing to take less than two minutes periodically to advocate for ESOPs, 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,



**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.

## Why it Matters

Lawmakers want to hear from you so they can respond to stories and messages from the people they represent. You need lawmakers to learn about ESOPs so they can make informed decisions affecting your livelihood. EOAN provides a unified voice for our community to educate and influence elected officials when it matters most. EOAN provides you with the information and tools you need to be an active participant on the state and federal levels.

## How it Works

1. **Sign Up:** Provide your email and home address so we can automatically connect you with your representatives.
2. **Get Informed:** When the government is deliberating something that will affect ESOPs, you will receive an email with all the info you need on the issue.
3. **Take Action:** Send the pre-written message to your representatives informing them of the issue and requesting that they support ESOPs.

*Successful grassroots advocacy starts with the individual. EOAN was built to work for you and in a quick, easy, and effective way!*

## Get Started

Sign up now at [esopassociation.org/eoan](https://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, or 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](mailto:esopadvocate@esopassociation.org).

## EOAN Member Benefits

- The ability to directly influence decisions that affect your livelihood
- 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 Government Relations Team
- Access to exclusive learning and training opportunities

# Simple Steps to Run a Successful EOAN Grassroots Effort at Your Company

## ☑ Make Your Plan

- Download EOAN graphics and sample communications to share at [esopassociation.org/eoan/shareables](https://esopassociation.org/eoan/shareables)
- Make a roster to identify who you are reaching out to for easy follow up

## ☑ Launch

- 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](mailto: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

- Send one of TEA's sample emails to everyone at your company encouraging them to join
- 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

We have developed several tools that you can use to introduce EOAN to your fellow employee owners and ESOP professionals. Visit the Advocacy Academy and Advocacy Resource Library on the ESOP Hub at [esopassociation.org/eoan/shareables](https://esopassociation.org/eoan/shareables) to access the EOAN sample presentation, social media posts, recruitment emails, and images.

## CONTACT THE ESOP ASSOCIATION

Please reach out to The ESOP Association Staff with any questions or comments about EOAN or ESOP Advocacy.

### Greg Facchiano

Vice President, Government Relations & Public Affairs  
[gfacchiano@esopassociation.org](mailto:gfacchiano@esopassociation.org)

### Patrick Russo

Director of Public Policy  
[prusso@esopassociation.org](mailto:prusso@esopassociation.org)

To learn more about EOAN or to take action, visit [esopassociation.org/eoan](https://esopassociation.org/eoan).

# Sample Email 1: TEA Member to Member

Dear [Colleague],

The ESOP community faces urgent regulatory and legislative challenges that require us to stand together to protect and grow ESOPs for our company and the nearly 11 million employee owners nationwide. The easiest and most effective way to address these challenges is to contact your elected officials when they are considering legislation that affects ESOPs. The ESOP Association (TEA) has a tool to make taking this essential action as easy as possible.

I am reaching out to encourage you to join the Employee Ownership Action Network (EOAN) to take action to address the issues affecting our ESOP.

EOAN is a free-to-join email list that informs you of urgent developments affecting ESOPs in government and makes it easy for you to take action. The program's ultimate goal is for ESOP community members to communicate with their elected officials to promote legislation that protects ESOPs and promotes employee ownership.

Thank you for your commitment to our ESOP and to advancing employee ownership! Please take a moment to register today by visiting [esopassociation.org/eoan](http://esopassociation.org/eoan).

Sincerely,

[Your Name]

[Your Position]

# Sample Email 2: TEA Member to Member

Hi [Colleague],

Our ESOP community is facing some big challenges from new regulations and legislation. To protect our ESOP and the nearly 11 million employee-owners across the country, we need to work together and make our voices heard in government.

The easiest way to do this is to join the Employee Ownership Action Network (EOAN)! It's a free email list that keeps you up-to-date on urgent issues affecting ESOPs and makes it easy to contact your elected officials when it matters most.

Let's make sure our voices are heard and continue to support employee ownership. Sign up today at [esopassociation.org/eoan](http://esopassociation.org/eoan).

Thanks for helping protect our ESOP!

Best,

[Your Name]

[Your Position]

# Sample Email 3: TEA Chapter Officer to TEA Member

Dear [Chapter Members],

I am reaching out as the [Chapter Officer Position] of The ESOP Association's [Blank] Chapter. Our ESOP community is facing some big challenges from new regulations and legislation. To protect our ESOPs and the nearly 11 million employee-owners across the country, we need to work together and make our voices heard in government.

The easiest way to do this is to join the Employee Ownership Action Network (EOAN)! It's TEA's free email list that keeps you up-to-date on urgent issues affecting ESOPs and makes it easy to contact your elected officials when it matters most.

I would greatly appreciate if you would encourage everyone at your company to join EOAN. TEA has toolkits available with more information on why this is so important and simple tools for you to encourage your fellow employee owners to join.

Let's make sure our voices are heard and continue to support employee ownership. Sign up today at [esopassociation.org/eoan](http://esopassociation.org/eoan).

Thanks for helping protect our ESOP!

Best,

[Your Name]

[Your Position]