



ESOPATHON

EMPLOYEE OWNERSHIP FOUNDATION



2025 PARTICIPATION GUIDE



EMPLOYEE
OWNERSHIP
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We are thrilled to have your support!

As we celebrate the fifth year of ESOPATHON, we're taking this milestone as an opportunity to return to our roots: honoring the spirit of **Employee Ownership Month** as a united community. ESOPATHON was born from a simple idea: to celebrate and expand employee ownership together. This year, we are refocusing our efforts and messaging on that foundational goal.

Whether you are a company, a professional, or an individual employee owner, this **Participation Guide** is designed to help you **integrate ESOPATHON into your existing EOM celebrations**. It offers tools, ideas, and resources to make your participation meaningful and impactful: whether you're planning a large company event or sharing your story on social media.

The Employee Ownership Foundation (EOF) thanks you for supporting our mission to grow employee ownership across the country. Across the nation, amazing ESOP companies, professionals, and employee owners like you are raising awareness of the incredible benefits of employee ownership, for workers, their families, their communities, and our economy.

At EOF, we believe in an ownership economy; one where hard work, commitment, and engagement are rewarded through shared success. The funds raised through ESOPATHON directly support that vision by protecting existing ESOPs and expanding access to employee ownership for more Americans.

This fall, throughout Employee Ownership Month in October, you'll be joining thousands of individuals and company teams across the country who are proudly displaying the **pride, responsibility, and financial benefits** of ownership while helping secure the future of employee ownership through fundraising and education.

Thank you for joining us. Thank you for celebrating. And thank you for supporting the Employee Ownership Foundation.

Sincerely,



Peter Ney
Chair, Board of Trustees
Employee Ownership Foundation



James J. Bonham
President
Employee Ownership Foundation

WHY ESOPATHON?

ESOPATHON is an employee ownership engagement and fundraising program for the Employee Ownership Foundation, held annually each fall through the end of October's Employee Ownership Month.

Why Participate?

Supporting ESOPATHON is one of the simplest and most effective ways to help grow the employee ownership community:

- **It's for your community.** When you support the Employee Ownership Foundation, you're helping the ESOP community thrive, from new business conversions to stronger public awareness and education.
- **It's for the future.** Your contribution helps ensure that employee ownership continues to grow, evolve, and remain a powerful force for equitable, stable workplaces across America.
- **It's for your company.** The Foundation's research, scholarships, and public awareness efforts directly support the value of your ESOP by making employee ownership more visible, credible, and impactful.

Whether you celebrate EOM through a company cookout, an educational workshop, a team-building day, or a social media post: that's already ESOPATHON. Adding a small fundraising component turns your celebration into a powerful statement of solidarity and support.

Why Give Back?

For over 30 years, the Employee Ownership Foundation has been the cornerstone of research, education, and leadership development for the ESOP community. As we look toward the future with major generational business transitions on the horizon, the need for strong, visible, well-resourced support for employee ownership is more important than ever.

By participating in ESOPATHON, you're helping ensure that more people, families, and communities can benefit from the life-changing power of employee ownership.

INCORPORATING ESOPATHON INTO YOUR EXISTING EOM CELEBRATIONS

Employee Ownership Month (EOM) is a time of pride, celebration, and reflection across the ESOP community. **ESOPATHON is not about adding more to your plate, it's about making what you're already doing go further.** Whether you're a company, a professional serving the ESOP space, or an individual owner, ESOPATHON can easily be woven into your EOM plans as a way to support, elevate, and expand the reach of employee ownership.

Why Integrate Fundraising into EOM?

When you incorporate ESOPATHON into your EOM celebrations, you're helping raise visibility for employee ownership while also fueling the Employee Ownership Foundation's (EOF) work. Every dollar raised supports critical research, storytelling, scholarships, and public awareness: all of which directly benefit your company, your clients, and the entire ESOP community.

By aligning your celebration with ESOPATHON, you help expand access to the life-changing benefits of employee ownership without creating extra work, **you're simply making the impact of your current efforts go further.**

How to Integrate ESOPATHON into What You're Already Doing

For Companies

• Hosting Educational Sessions?

Add a slide or short segment about the Employee Ownership Foundation's work, including scholarships, public education campaigns, and research that supports the ESOP model.

Pro-tip: If your company has had a scholarship or program participant (like the CEO Leadership Program or ESOP Employee Accelerator), highlight that story.

• Company-Wide Celebrations (e.g., Waffle Wednesday, team outings, lunch & learns)?

Include a small fundraising twist:

- o \$5 to wear jeans or enter a raffle
- o Set up a donation station or QR code at the event
- o Add a donation competition by department or location
- o Encourage company or leadership to match funds raised during these events

• Employee Spotlights or Ownership Storytelling?

Encourage employees to share why they value being an owner and include a fundraising link in internal newsletters or social media posts.

Pro-tip: Highlight if your company will match employee donations—this doubles the impact and encourages giving.

• Internal Campaigns?

Use your company's intranet, Slack channels, or digital signage to highlight ESOPATHON and offer matching donations or small incentives (e.g., coffee gift cards) to employees who participate.

• Leadership Messages?

Encourage executives to share why they're donating to ESOPATHON in company-wide communications. That simple act of visible leadership can inspire broad participation.

For ESOP Professionals (Lawyers, Advisors, CPAs, Bankers, Trustees, etc.)

• Client Communication

Incorporate ESOPATHON messaging into October newsletters or outreach:

"In honor of Employee Ownership Month, I'm supporting the Employee Ownership Foundation and encouraging my clients to do the same. Every donation helps support the research, education, and awareness that strengthens our entire community."

• Offer a Value-Add

Provide a small service discount, a free consultation, or branded giveaway to clients who donate to ESOPATHON and share their donation receipt.

• Host a Client Roundtable or Webinar?

Dedicate a few minutes to discussing how the EOF supports the ESOP ecosystem you all work within and invite participants to join you in supporting its future.

For Individuals

• Already Sharing Your ESOP Journey?

Add a link to your ESOPATHON fundraising page when you share a story about what employee ownership means to you. Use the steps from our "Easy Steps to Make the Ask" section to guide your post.

• Celebrating at Work?

Bring up ESOPATHON at your company's EOM events. You don't need to organize a new activity, just use the opportunity to share your campaign and explain why you're raising money for the EOF.

• Having Conversations?

Talk about employee ownership with family, friends, and neighbors. Make it personal, share how your company and community have benefited, and invite them to support the movement with a small donation.

Talking About ESOPATHON in Your Celebrations

Here's how to introduce ESOPATHON naturally:

"This year, during Employee Ownership Month, our team is proud to support the Employee Ownership Foundation through ESOPATHON. We're already celebrating what makes our company special and this is our chance to help more people across the country experience the same. If you'd like to support the future of employee ownership, we'd love your help!"

And if you're doing it personally:

"I'm celebrating Employee Ownership Month by supporting the Employee Ownership Foundation through ESOPATHON. I love being an employee owner, and this campaign helps more people and companies access the same opportunity."

Final Thought

You don't need to reinvent the wheel: just point it in the direction of impact. ESOPATHON is here to celebrate what you're already doing and connect your celebrations to a broader, shared purpose. By integrating fundraising into your existing plans, you become part of a collective effort to build a stronger, more visible, and more resilient employee ownership community.

WHERE DOES MY MONEY GO?

When you donate to ESOPATHON, you're supporting the mission of the Employee Ownership Foundation (EOF), a 501(c)(3) nonprofit dedicated to expanding and strengthening employee ownership across the United States and beyond. Your contribution helps make employee ownership more accessible, more visible, and more impactful, for individuals, companies, and communities.

Each year, the EOF funds **research, education, awareness campaigns, scholarships, and leadership development**. These programs are designed to support current employee owners, help more companies transition to the ESOP model, and provide the tools and data needed to grow the movement.

Here's how your support helps:

Scholarships

- **Charles R. Edmunson Scholarships:** Supports 10 employee owners each year to attend educational programs that deepen their knowledge of employee ownership.
- **EOF Trustee Scholars Program:** Awards renewable college scholarships (up to \$20,000 over four years) to children of employee owners, investing in the next generation of leaders who've grown up within an ESOP household.

Research & Awareness

- **National Research Initiatives:** EOF funds groundbreaking academic research and large-scale surveys through institutions like Rutgers University, including large scale National ESOP Employee Surveys in partnership with Rutgers University, examining ESOP impacts on wages, retention, communication, and leadership.

- **Market Awareness Campaigns:** Helps policymakers, business owners, and the public understand the benefits of employee ownership through national advertising, storytelling, and media outreach.
- **Business Succession Video Series:** Real-life stories that demystify ESOPs and inspire more businesses to make the transition.

Education & Leadership Development

- **Oxford Symposium on Employee Ownership:** An international platform for policy and academic leaders to exchange ideas and expand global employee ownership.
- **Leading in an Ownership Setting:** Newly expanded this year! A premier leadership program for CEO and CFOs of ESOP companies developed with the UVA Darden Executive Education team.
- **ESOP Employee Accelerator:** A one-day foundational course for non-managerial employee owners to better understand business fundamentals and the power of ownership.

Why It Matters

Your contribution supports the infrastructure behind employee ownership, ensuring more people can experience its benefits. From first-time business transitions to seasoned ESOPs looking to deepen engagement, the EOF plays a critical role in shaping the future of our community.

Thanks to your support through ESOPATHON, we can grow stronger, reach farther, and bring more people into the ownership economy.

Learn more at: employeeownershipfoundation.org

To register for ESOPATHON
please scan the QR Code
or visit esopathon.org



Helpful Resources

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