



ESOPATHON

EMPLOYEE OWNERSHIP FOUNDATION

2026 PARTICIPATION GUIDE



EMPLOYEE
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FOUNDATION

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International Employee Ownership Center
200 Massachusetts Avenue NW
Suite 410
Washington, DC 20001
202-223-2345
info@employeeownershipfoundation.org
EmployeeOwnershipFoundation.org



Supporting the 6th Annual ESOPATHON: Celebrating Employee Ownership Together

Dear Friends of Employee Ownership,

On behalf of the Employee Ownership Foundation, I am proud to support the 6th Annual ESOPATHON, our fall fundraising campaign that begins September 1 and concludes on the final day of Employee Ownership Month in October.

ESOPATHON was born from a simple but powerful idea: to celebrate and expand employee ownership together. Over the past six years, supporters from across the employee ownership community have come together to raise awareness, build connections, and invest in the future of employee ownership. Thanks to your enthusiasm and generosity, ESOPATHON has become more than a fundraiser. It has become a celebration of the people who make employee ownership thrive.

This year, we are putting employee owners front and center.

Through our “Spotlighting Employee Owners” theme, we will highlight the stories, experiences, and contributions of employee owners wherever they are participating and fundraising. From Chapter and Regional events to company gatherings, community activities, and individual fundraising efforts, we want to showcase the incredible people who demonstrate the power of employee ownership every day.

Employee ownership changes lives by creating opportunities for workers to share in the success they help create. ESOPATHON offers all of us an opportunity to celebrate those achievements while supporting programs that educate, inspire, and expand employee ownership for future generations.

We invite everyone in our community to join the celebration and help us tell these stories. If you are participating in ESOPATHON, please share your:

- Videos
- Photos
- Social media posts
- Event highlights
- Employee owner stories

Send your submissions to marketing@esopassociation.org for a chance to be featured throughout the campaign.

Together, we can honor the employee owners who strengthen their companies, communities, and families while helping build a stronger future for employee ownership.

Thank you for supporting the Employee Ownership Foundation and the 6th Annual ESOPATHON. We look forward to celebrating with you throughout September and October.

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.

ESOPATHON FILMING GUIDE: SHARE YOUR STORY, BUILD MOMENTUM

ESOPATHON is the Employee Ownership Foundation's single largest annual fundraising event, supporting scholarships, leadership development, research, and other initiatives that advance employee ownership.

Video is one of the most powerful tools for driving engagement, raising money, and building awareness during ESOPATHON. A short, authentic clip showing how your team is raising money puts a real face and a real story behind the campaign, something a flyer or email can't do. These videos help donors see exactly what their support makes possible, and they inspire other teams to keep pushing toward their goals.

We're asking employee owners across the country to share how they're raising money for ESOPATHON. Whether it's a bake sale, a chili cook-off, a jeans day, or something bigger, we want to hear the story behind it. It takes just a few minutes to film, and your story could be the reason another team steps up their game, or another donor decides to give.

What to Talk About

You don't need a script — just speak from experience. Consider addressing:

- What is your team doing to raise money for ESOPATHON?
- What's the story behind your fundraiser: why this idea, why now?
- How has your team or company gotten involved?
- What does being an employee owner mean to you?
- Why should others support employee ownership through ESOPATHON?

Filming Guidelines

- Use your phone and record vertically.
- Record in 4K if your phone supports it.
- Find a quiet space with minimal background noise.
- Face a window or other light source so your face is well lit.
- Choose a background that feels natural and authentic to you.
- Hold your phone at about eye level and keep your face and shoulders comfortably in the frame.
- Look directly into the camera and speak naturally.
- Keep the phone as steady as possible.
- Leave a couple of seconds of silence before and after speaking.
- Keep it short: 30-60 seconds holds attention best.

Sharing Your Video with TEA

If you're willing to participate, please send us a video or written testimonial. If your video file is too large for email, you can share it through Google Drive, WeTransfer, or another file-sharing service.

Send to: marketing@esopassociation.org.

ABC'S OF IDEAS

There are endless opportunities to participate, pick one or do them all!



Ad Program, Art show, auction

Bake sale, bike, bowl, bingo

Cycle, cook off, costume party, car wash, cartoons

Dollars for days off, donate, dance marathon, dodgeball

Exercise class, eating contest, embarrass the boss

Fashion show, films, fish, funny photo contest, family day

Game night, golf tournament, guess the amount, garage sale

Host an event, happy hour

Ice cream social

Jump rope, jazz night

Karaoke night, kick-a-habit

Learn a new skill

Match giving, movie night

Night walk

Online cooking class, obstacle course, open mic night

Pizza party, pet challenge, potluck event, ping pong tournament

Quiz night

Run, read, relay race

Swim, scavenger hunt, sports day

Theme day, teatime, talent show, trivia night

Used book sales, unplug from tech, Ultimate Frisbee

Virtual event, vacation days, variety show

Walk, wear something, world record attempt

X-factor competition

Yard sale, yoga marathon

Zero waste day!

Still stumped? Ask your colleagues how they would like to celebrate Employee Ownership Month and make it happen!

CORPORATE TEAMS

Teamwork is the key to success! Forming a corporate team is a great way to get your company celebrating Employee Ownership Month while supporting the Employee Ownership Foundation. Companies can choose to create one team or as many as they would like!

Why are teams important?

- Increases company visibility and shows its commitment to its employee owners
- Offers employees opportunities to collaborate and communicate across different departments and/or locations
- Promotes team spirit and increases office morale
- Creates partnerships with other ESOPs and employee owners in their community
- Makes a greater contribution to the Employee Ownership Foundation
- And, ultimately, it's more fun to do it together!

What does it take to be a team captain?

You'll be an amazing team captain if you..

- Invite others to join your team
- Set up a fundraising goal
- Fundraise and encourage your team members to fundraise
- Coordinate activities and invites
- Celebrate team successes
- Personalize and update your team's fundraising page
- Share stories
- Match donations
- Thank your teammates and donors
- Share resources
- Have fun!

How can my company support a team?

- Recruitment: use corporate newsletters or your company's intranet to encourage participation
- Offer a corporate match for funds raised
- Provide incentives to encourage participation
- Host a lunch or event and encourage attendees to participate

Team motivation

Here are some ways to motivate others!

- Host a team kick off meeting
- Create some friendly competition by asking other departments or locations to participate
- Create weekly themes
- Organize team activities
- Send team messages
- Highlight your teammates successes!

Team-building timeline

1. Decide who will be your corporate team captain
2. Set up your team page and goal
3. Decide who should be on your team
4. Ask people to join your team
5. Follow up with anyone who hasn't responded
6. Post messages on social media, on your office intranet site, and/or company newsletter. Pass out flyers or post a sign in your break room.

FUNDRAISING TIPS: EASY STEPS TO MAKE THE ASK

Here's an example of a great "ask" following the steps below:

"I'm fundraising for the Employee Ownership Foundation by participating in ESOPATHON. The money I raise will fuel the mission of the Employee Ownership Foundation (a federally registered nonprofit) and help expand access to employee ownership. It's important for me to raise awareness so others can benefit from employee ownership like I have. My company has (number) employee owners in (city) alone and supports local jobs, economic stability, and is a strong supporter of our community through volunteer and charitable contributions. During the month of October, I will be (activity – such as running a mile per day) with my colleagues to support ESOPATHON and bring more employee-owned businesses into existence. Will you support me by donating \$25?"

STEP 1

Explain what you're doing.

"I'm fundraising for the Employee Ownership Foundation by participating in ESOPATHON. The money I raise will fuel the mission of the Employee Ownership Foundation (a federally registered nonprofit) and help expand access to employee ownership."

STEP 2

Make it personal.

"It's important for me to raise awareness so others can benefit from employee ownership like I have. My company has (number) employee owners in (city) alone and supports local jobs, economic stability, and is a strong supporter of our community through volunteer and charitable contributions."

STEP 3

Share how you are supporting ESOPATHON.

"During the month of October, I will be (activity—like running a mile a day) with my colleagues to support ESOPATHON and bring more employee-owned businesses into existence."

STEP 4

Make a specific request.

"Will you support me by donating \$25?"

STEP 5

Be patient and follow up.

Don't rush a response, give your donor time to consider your request and plan to follow up soon.

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TIPS FOR FUNDRAISING SUCCESS

- 1. Donate to your own campaign.** Want to know the best way to start? Lead by example and make a **tax-deductible** donation to your own campaign. Not only will you take the first step toward reaching your goal, but your gift will inspire others to also give.
- 2. Tailor your message to who you're asking.** Consider what type of message would be appropriate. Some might prefer a more formal message, while others respond better to an informal message. Make sure your email explains why you are participating and supporting ESOPATHON and a link to your campaign page and instructions on how to donate.
- 3. Send some emails.** Reach out to co-workers, vendors, family members, friends, neighbors— anyone who might be willing to support and expand employee ownership. Take advantage of the predrafted messages in the ESOPATHON platform and don't forget to check out the platform's other tools like social message sharing!
- 4. Give a timeline.** Donors don't always donate right away, so providing a timeline gives potential donors a sense of urgency and enough time to do a little research if needed.
- 5. Use multiple avenues to share.** Social media is a powerful tool for fundraising. Share your personalized page on Facebook, Twitter, LinkedIn and/or Instagram and continue to share updates on your efforts all month long.
- 6. Don't forget the human connection.** While emails might be easier, picking up the phone or walking over to your coworker's desk is always the preferred method to making the ask!
- 7. Get creative.** Instead of sending out emails, consider hosting a dinner party and asking your guests to contribute to your efforts. If you're looking for more ideas check out our "ABC's of Ideas" guide on page 7.
- 8. Follow up.** It's very common to put things off, a little reminder nudge never hurt anyone.
- 9. Be appreciative.** Make sure you are always sending a timely thank you note! You can even tag them on social media and thank them publicly, so that both they and others know their donation is appreciated.
- 10. Pursue matching gifts.** Many employers sponsor matching gift programs and will provide charitable contributions for donations made by their employees. A matching gift is an easy way to double your tax-deductible donation to the Employee Ownership Foundation! Check to see if your company has a matching gift program or ask if they are willing to match your contribution.

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:** The executive leadership education 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

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