



## LETTER FROM THE PRESIDENT

*Dear friends in the New England Chapter,*

I hope you had a nice summer and are settling comfortably into fall activities. Just last month we concluded our first series of in-person roundtables since the pandemic with our HR Conference, thanks to Praxis Consulting Groups' Jon Sweigart and Alex Moss. We also produced our first in a series of webinars thanks to Christie Kane, Jesse Tyler, and Danielle Moody, who presented a wonderful seminar on recruiting, onboarding, and retaining outstanding employee-owners. Looking ahead, ***Employee Ownership Month is right around the corner.*** Kick off your EOM by attending our [Annual Fall Conference](#) at the MGM in Springfield, MA! ***This year's conference will be held on October 5th - 6th and features fresh, interactive twists on the high-quality content we always look forward to at NE Chapter events.***

Looking for ideas for the rest of your EOM programming? Consider giving each week during EOM a theme. (**#EOMhacks** – you saw it here first!) Most programming has a theme or focus anyway, and grouping programs accordingly helps us organize them and

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strengthen their impact. What themes could you use? Look at your company's mission and values. Do they mention giving back to your community? Start Ownership Month with a Community Service week. If your company offers paid time off for community service, consider promoting its use during this week. If not, band together to support a local cause, like cleaning or landscaping a public area, or volunteering at a non-profit. Do you practice continuous improvement? Hold a continuous improvement competition. What about ESOP education? Turn that slide deck into a Jeopardy game or scavenger hunt. Wrap up EOM with an ESOP Community-themed week to deepen your roots within the employee ownership community. [Reach out to employee-owners at other ESOP companies; post photos of your events on social media; form a team and support ESOPathon.](#)

Whatever themes you choose, The ESOP Association provides resources to help organize and enrich your EOM programs. Visit our [Employee Ownership Month page](#) for more ideas, wearables, posters, and banners. Follow the links therein to the [EOM Network](#) on [The Hub](#), where you will find everything from calendars to website banners, to Zoom backgrounds, to fun facts and quizzes. Also, in time for EOM, ***we are launching a Mentorship Program, with the goal of sharing NE Chapter companies' wealth of experience with one another in a mentor-mentee format.*** Find details below in the newsletter, and whether you are a newcomer or an ESOP veteran, please consider getting involved! Finally, save some ESOP energy for [Employee Owned 2022](#), The ESOP Association's National Conference in Las Vegas on November 9th – 11th.

As always, we, your staff in the New England Chapter, are here to help you get the most from your ESOP Association membership. If you need anything or just have a question, please feel free to reach out to me at [amoberger@avidproducts.com](mailto:amoberger@avidproducts.com) or contact another [New England Chapter volunteer](#); check out our [NE Chapter network](#) on The Hub to connect with other chapter members, and stay tuned to Twitter [@ESOPNE](#) for the most recent ESOP news in our chapter and across the country. I hope to see many of you at the Fall conference!

Sincerely,

Aaron Moberger

Aaron Moberger  
President, New England Chapter

## UPCOMING EVENTS

### 1 NEW ENGLAND FALL CONFERENCE

October 5-6, 2022  
MGM Springfield  
One MGM Way  
Springfield, MA 01103

More info at:

<https://www.esopassociation.org/chapters/new-england>

You can also contact  
Rita Tucker, Chapter Executive  
[rtucker@esopassociation.org](mailto:rtucker@esopassociation.org)

## SEND US YOUR NEWS!

Have a newsworthy event  
at your Company?

Forward any pictures or  
articles to us and we will  
be happy to share your  
news with the rest of the  
Chapter.

Contact Jessie  
Jamison, VP of Chapter  
Communications at  
[jjamison@sebagotechnics.com](mailto:jjamison@sebagotechnics.com)



The New England Chapter invites you to the:

# FALL CONFERENCE

**WHEN?** October 5-6, 2022

**WHERE?** MGM Springfield  
One MGM Way  
Springfield, MA 01103

## COMPANY SHOWCASE



Our Company Showcase  
this year will be a virtual  
event hosted by [Tech Etch!](#)

## WE HOPE YOU'LL JOIN US!

The New England Chapter of The ESOP Association is pleased to announce a Fall in-person event to engage Chapter members with an educational and networking opportunity. This 1.5-day conference will provide great educational content and plenty of time to network with your peers! The Programming Committee worked hard to provide you with an agenda of great content including communications/culture, core concepts, technical, & leadership topics.

**REGISTER**



# COMPANY MENTORSHIP PROGRAM



*ESOP companies have the ability to sign up and partner with another ESOP company to share information, tour the company and share ideas around programs. This could be particularly helpful for new ESOPs that would like to start developing programs around education and engagement.*

## GOALS:

- ◆ The mentorship program pairs NE Chapter companies together in a mentor-mentee relationship based on location, type of industry, years of ESOP experience, and other relevant attributes.
- ◆ We encourage experienced ESOP companies to sign up as mentors, so that as newer companies sign up, we can help make connections as quickly as possible.
- ◆ Typical mentorship activities could last for 6 months to 1 year; however, we hope the relationship between paired companies lasts much longer.
- ◆ You can find sample mentor/mentee timelines and expectations to the right. Some examples of collaboration could be:
  - » Inviting each other to come to ESOP committee meetings.
  - » Setting up a new committee & sharing structure.
  - » Discuss engagement programs that work (think of our “Nifty Fifty” conference sessions).
  - » Sharing collateral and resources, such as committee charters, educational presentations, onboarding practices, etc.
  - » Touring a company to understand the ESOP impact and other programs like Ideas Boards.
  - » Sharing information and contacts including third party administrators, attorneys, and other professionals.
  - » Paring up “like positions” for knowledge sharing; for example, HR, Finance, or Operations staff.

## MENTOR EXPECTATIONS:

- ◆ Up to 1-hour total time committed per month over 6 months.
- ◆ Series of 6 interactions - monthly check-ins or activities.
- ◆ Discuss your goals for the mentorship, understand the goals of your mentee.
- ◆ Discuss how you best communicate: email, Teams, phone, etc.

## MENTEE EXPECTATIONS:

- ◆ Start with developing your goals:
  - » What do you hope to learn from this experience?
  - » What program development and/or specific guidance are you seeking?
- ◆ Discuss your goals for the mentorship, understand the goals of your mentor.
- ◆ Discuss how you best communicate: email, Teams, phone, etc.
- ◆ Confirm up to 1-hour total time committed per month over 6 months.
- ◆ Series of 6 interactions - monthly check-ins or activities: outline with your mentor.
- ◆ Write experience summary after completing 6-month mentorship to share with your mentor and NE ESOP leadership team.

*For more information, please contact **Christie Kane** (VT State Captain) at [christiek@gardeners.com](mailto:christiek@gardeners.com)*

# EMPLOYEE-OWNERSHIP IN ACTION



## Tech Etch Team Build with Habitat Humanity

Tech Etch is an employee-owned company with a mission to inspire, create, and provide innovative solutions to enhance lives globally. We've been 100% employee owned since 2018 and have been actively involved in our local communities. In fact, most recently our Employee Owners partnered with [Habitat for Humanity of Greater Plymouth for a Volunteer Day to help renovate the home of a local teenage girl suffering from a disability](#). They enthusiastically brought skills, energy and willingness to learn something new during this home-build and made great progress on the vinyl siding work on the home's new addition. We're so proud of the generosity and kindness of our Tech Etch Employee Owner crew, we had to share it with our ESOP friends!



## Sebang Technics Day of Service at Camp Susan Curtis

Sebang's Day of Service 2022 at Camp Susan Curtis in Stoneham, ME has become a fun and meaningful demonstration of our commitment to our communities. [Through the work we do at CSC, we help shape the future of this worthy organization and the children and families it serves](#). On top of that, we got to spend a day in the great Maine outdoors! The goals of the day were to provide service, team building, and comradery. All goals were extensively achieved and will make the Camp a much safer, cleaner, and brighter place for campers.

The day showed why our Owners are the best! [The hard work, perseverance, and willingness to help are qualities they all display every day](#). Everyone working side-by-side, sometimes out of their comfort zone, learning new skills, and just being together - a perfect example of "The Sebang Way". We thank our Employee Owners for their participation, hard work, and willingness to help a worthy organization!

Click [here](#) to learn more about Camp Susan Curtis and its mission.





# Call for **MYSTERY BAG** DONATIONS!

The 2022 New England Conference will once again include our **Mystery Bag Fundraiser!**

The money raised from the Mystery Bags allows the **Employee Ownership Foundation Inc.** to fund research and educational programs to increase the level of awareness and appreciation of the benefits of employee ownership and increase the number of employees who have access to these benefits.

Learn more at:  
[employeeownershipfoundation.org](https://employeeownershipfoundation.org)

We always appreciate the kind donations from our members. ***In the past we've surprised Mystery Bag Recipients with TVs, Gift Cards, Gift Baskets, as well as merchandise generously donated by our member companies.***

If you would like to donate, please send an email to [jpalamo@empireval.com](mailto:jpalamo@empireval.com) and let us know what your organization would like to contribute!

While we happily except multiples, we kindly ask that you provide no more than 25 of the same individual item.

No time to shop? ***We'd be happy to do the shopping for you*** if you would prefer to donate funds instead of items.

Lastly, we will be happy to provide shipping/drop off information upon confirmation of your donation!

If you have additional questions about an item or items you are considering donating, please do not hesitate to contact [jpalamo@empireval.com](mailto:jpalamo@empireval.com)



**Thank you in advance, and we look forward to hearing from you.**

**Jade Palermo**  
VP of FUNdraising



# RETAINING GREAT EMPLOYEES

by Cirtronics



*In this time of “the great resignation,” employees have a sense of mobility that we, as employers, need to acknowledge. At Cirtronics, we maintain an extremely low turnover rate! We know we’re lucky, but it takes much more than luck alone.*

First, we need to acknowledge the kind of changes and challenges our employees are experiencing and take steps to meet them where they are on the journey. Second, we need to understand our employee-owners both from a demographic perspective and as individuals.

Our company is going through a period of accelerated change. In the past year, we hired over 30 people (our headcount is around 220). We have great diversity in the demographics of our employee-owners. The ages of our employees range from the early 20s to mid-70s. Our long-term employees have been with us for 15, 20, or 30 years and more. Unique generational expectations and emotional responses to significant organizational change require that we be creative with how we sustain our culture and retain our employee-owners.

## HOW DO WE DO THIS?

**Communication:** We are as transparent as possible with where we are against our shipment goals daily. We share our financials. Our quality reports. Our returns. We minimize the kinds of surprises that could be unnerving. As an employee-owned company, everyone has a stake in our success. So, we make what some may feel is an extra effort to ensure everyone has access to company information. To be honest, it isn’t an extra effort for us. It’s just something we do.

**Individual Growth:** We focus on each individual. In HR, we encourage open conversations about interests and internal mobility. And then we provide support. Job shadowing, cross-training,

introductions to new equipment and processes, and professional development like leadership and change management training... are some of the direct ways we help support individuals’ professional goals.

**Work/Life Balance:** We recognize our employees’ expectations of a work/life balance. Cirtronics provides every employee with the flexibility to adapt their work schedules. And, a new remote work policy has been well received to assist employees in meeting real-life needs. At Cirtronics, work/life balance isn’t just a catchphrase.

**Culture of Service:** One of our foundational values is a culture of service. Motivated by our Quality Policy of the 6 We Serve – our 6 constituents (Customer, Corporation, Community, Environment, Supplier, and Employee-Owner), we offer 30 paid volunteer hours to any full-time employee-owner for use, from school field trip chaperoning to highway clean-up or food pantry meal preparation. We build bridges, literally and figuratively. Working together to support our community and environment builds teams, humility, and a shared sense of purpose beyond our walls; it builds pride in our company.

**Ice Cream:** We truly value our employee-owners. Food brings us together, and, as the saying goes, food is love. We create special events to mark changes in season, big meetings, milestones, etc. But it’s the daily things we do that truly matter. We’ve created special food days that have become part of our work-week rhythm. One day we offer popcorn, another, fresh fruit, and a favorite is ice cream day. We have found that something as simple as providing something yummy, consistently, on the same day, week after week, can make the workplace feel more like home.



*If you or someone you know is looking for a great place to work, visit [www.cirtronics.com/careers](http://www.cirtronics.com/careers)*





## MEET OUR NEW ENGLAND CHAPTER OFFICERS



**AARON MOBERGER**  
*President*

Project Manager @  
AVID Products



**AMY HUOT**  
*Immediate Past President*

Manager, Product Intelligence &  
Process Support @ Proponent



**SANDRA SMITH**  
*Vice President - Programming*

Director @ Atlantic Management  
Company, Inc.



**JOSEPH VERRI**  
*Vice President - Membership*

Senior Vice President, Financial  
Advisor @ Morgan Stanley



**BARBARA CLOUGH**  
*Vice President - Advocacy*

Senior Manager @ Crowe LLP



**JESSIE JAMISON**  
*Vice President - Communications*

Marketing Manager @  
Sebago Technics



**JADE PALERMO**  
*Vice President - Fundraising/Sponsorships*

Manager @ Empire Valuation  
Consultants, LLC



**RITA TUCKER**  
*Chapter Executive*

Chapter Executive @  
The ESOP Association





## NE Chapter Officer SPOTLIGHT



# MEET SANDRA SMITH!

V.P. of PROGRAMMING

Director, Atlantic Management Company, Inc.

### ***Where did you grow up?***

I grew up on a working farm in Surry, NH. It's a small town (about 800 people) located near Keene. After high school, I moved to Portland, ME for a few years before starting college at the University of Southern Maine. I transferred to Florida Atlantic University in Boca Raton in my sophomore year. After college, I moved back to the Manchester, NH area and have been here ever since!

### ***What was your very first job, and what did you learn from it?***

Technically, my very first job was as a kid working for my dad on the farm (he raised cows). I learned a lot about responsibility and how to care for animals. I had a couple of horses, too. I actually almost went into veterinary school because of the experience. But my first paid job was in retail at JC Penney in high school. The interpersonal skills I learned through retail still translate into things I do every day. It was a great experience.

### ***What is your favorite part of the work you do?***

My favorite part of my job is the closing day on a new ESOP transaction. Not only because it's so gratifying to conclude months of hard work and negotiations, but because I feel like I've made a little bit of difference in the world by helping create new employee-owners. I like that I can help a business owner realize their dream of retirement while retaining the legacy of the company they built and rewarding those that helped build it.

### ***What are your hobbies outside of work?***

I love to bake cakes – I'm fascinated by cake decorating and the skills that some people have. Interestingly though, I'm really not into sweets, so my family eats a lot of cake!! I also picked up running a few years back. I enjoy taking the time to run mid-day and find that it's

a nice mental reset during the workday. The first race I entered was a half marathon and it was canceled because of COVID. But they held it virtually and I placed second in my age group (but don't ask what group that is)!

### ***Where would you like to go on a dream vacation?***

So many places!! I love to travel. But I have always wanted to go to Bali and stay in one of those huts/water bungalows. The water there is crystal clear blue and those huts just look so tranquil. It's on my bucket list!!

### ***Do you have a hidden talent? If so, tell us about it!***

(\*\*nerd alert\*\*) I am super-fast on the ten-key, and I can add a list of numbers while having a conversation or singing along to a song. It's definitely a function of using two different parts of the brain simultaneously. I have the rare ability to perform the Gorlin sign (you'll have to Google that one), which only about 5% of people can do.

### ***What inspired you to become an Officer and what advice would you give to someone who is thinking about volunteering with the Chapter?***

About 10 years ago, I went to my first chapter event. It was the Fall Conference up in Killington, VT. I met several people there and, when I left, I was the NH State Captain. Being relatively new to ESOPs at the time, I initially viewed it as a great opportunity to get involved and meet people. A few years later I was asked to step into the VP of Programming role. We have a great team and I just really enjoy working with the other volunteers. I also love conference day and feeling the energy in the room and seeing the excitement on people's faces when they are able to connect with other ESOPs, meet new people, or see people they haven't seen in a long time. It's such a great community – I don't think there's another one like it.

# MEET OUR NEW ENGLAND STATE CAPTAINS

## CHRISTINE COOGAN

*State Captain - MA*

## DANIELLE MOODY

*State Captain - ME*

## ANTHONY BOI

*State Captain - RI*

## JESSICA KINSEY

*State Co-Captain - NH*

## JESSE TYLER

*State Co-Captain - NH*

## CHRISTIE KANE

*State Captain - VT*

## OPEN POSITION

*State Captain - CT*

*Contact Aaron Moberger for  
more info!*



## BECOME AN OFFICER OR STATE CAPTAIN!

*Are you interested in getting more involved with the New England Chapter? We are currently seeking passionate and enthusiastic individuals to become future Officers & State Captains! To learn more about this exciting opportunity, please contact Aaron Moberger, Chapter President, at [amoberger@avidproducts.com](mailto:amoberger@avidproducts.com).*



# Thank you to our **2022** NEW ENGLAND SPONSORS

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## PROMOTERS



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