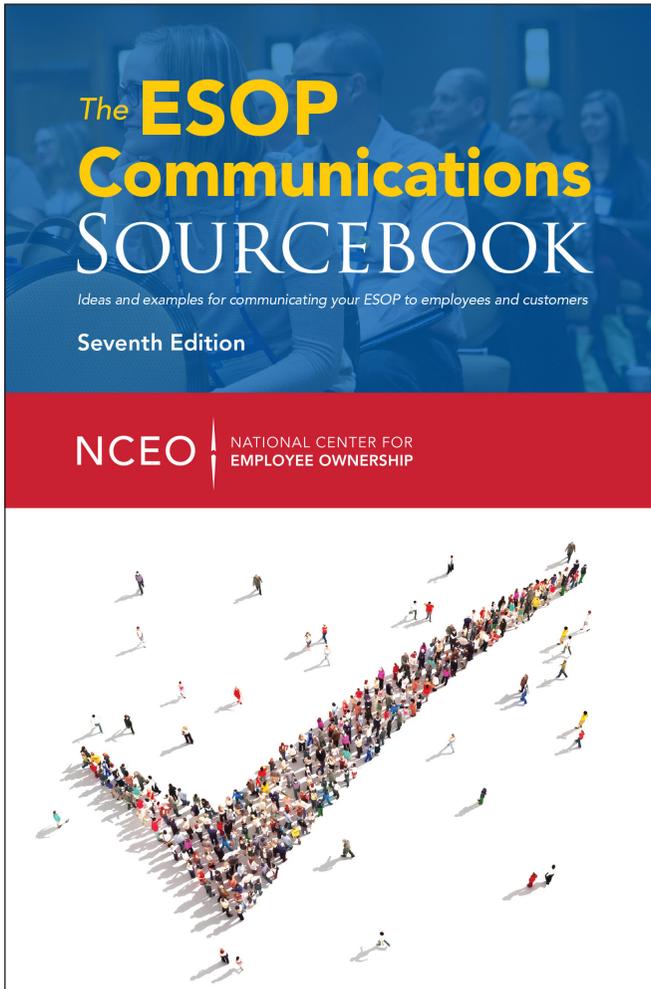


Engaging English Language Learners

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The United States is growing more diverse, both ethnically and linguistically. In 2010, the U.S. Census reported that 20% of the U.S. population spoke a language other than English at home. The Pew Research Center, extrapolating current trends, predicts that by 2050 one in five Americans will be an immigrant. Many ESOP companies reflect this diversity in their workforces, where some employees may speak limited English.

Ensuring that these English Language Learner (ELL)¹ employees understand employee ownership, and are treated like owners, is important to developing their skills and talents for the company. This chapter shares examples from companies that actively reach out to their ELL employees, and identifies principles for leveraging a linguistically diverse workforce to improve company performance.

ESOP Education

Obviously, ELL employees need to understand how employee ownership works. Teaching employee ownership concepts can be challenging enough on its own, but it is even more daunting when teaching those whose first language is not English.

Written Materials

Written materials translated into an employee's primary language are an easy first step to convey information to ELL employees. ESOP writ-

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1. "ELL" stands for English Language Learner and refers to anyone who is in the process of learning English. The person could be starting to learn English or could be near fluent. "ESL" or English as a Second Language" is often used interchangeably with ELL, though they have slightly different meanings in education contexts.

ten materials can range from the basic summary plan description to ESOP fact sheets, FAQs, intranet pages, and posters. If a company uses translation services, it may want to confirm the final translation with bilingual speakers² in the company, who might highlight any awkward phrasing or confusing segments.

While written information educates employees about the ESOP at a basic level, it is unlikely to cultivate deeper understanding of employee ownership. In any language, people frequently only glance at written materials and may hesitate to ask questions. Furthermore, if English speakers have the opportunity to attend presentations in English while ELL speakers only receive written communication, companies may unintentionally telegraph that ownership is not important, or that ELL employees are less valued.

In-Person Training from Bilingual Speakers

Trained bilingual speakers can deliver powerful educational sessions without the help of a translator. Seeing an in-person presentation delivered in their primary language helps ELL speakers feel comfortable and ask more questions. PC Construction is a 100% ESOP-owned construction company headquartered in Burlington, Vermont. Its workforce is approximately 40% Spanish-speaking. The company trained internal bilingual speakers, mostly from the field, to deliver ESOP education sessions in Spanish at all of its construction sites. Austin Industries, another 100% ESOP-owned construction company headquartered in Dallas, Texas, has several bilingual speakers in its Human Resources group who provide ESOP education annually in the field. The company's selling shareholder spoke Spanish and recorded a video in Spanish in 1986 explaining why he established an ESOP. It demonstrated to Spanish-speaking employees their importance and value to the company. The video is still available for employees to view.

Developing bilingual employees as trainers and inviting them into communication roles has many benefits. Peer-to-peer teaching about the ESOP authentically communicates enthusiasm for the value of em-

2. For simplicity, I use the term "bilingual" to refer to someone who is fluent in English and their native language. That being said, it is not uncommon for someone to be multilingual and fluent in multiple languages.

ployee ownership. Employee presenters are often better at explaining concepts accessibly, and usually know how best to link the ESOP to employees' cultural values. Trainers often take the initiative to follow up with people after education sessions, asking privately whether they have additional questions. Moreover, inviting bilingual employees to take on presenting roles enhances their professional development and demonstrates that they are recognized and valued by the company.

Translators

Translation of English presentations can be effective too. Even if the presenter cannot speak employees' primary language, the company's investment in live translation is meaningful. Many companies rely on bilingual employees to translate presentations, which has the added benefit of leadership development and greater exposure for bilingual speakers in the company.

Hiring professional translators is also an option. They often offer additional services such as live simultaneous translation in-person and on-demand telephone interpreting services. Third-party administrators and other vendors may also have translation resources available. Some companies have even creatively sought out friends or family of ELL employees and community members.

ESOP-specific translation benefits from advance preparation. ESOP language is technical, with terms like “vesting,” “allocation,” and “diversification” that can be tricky to translate. Without advance preparation and a solid understanding of the ESOP itself, concepts may be miscommunicated. Even aside from technical language, common expressions may sometimes translate incorrectly. For instance, in Spanish *retirarse* can signify “retiring” as well as “leaving the company.” Advance preparation with translators is essential to help them understand the concepts and choose the right vocabulary.

Cultural Assumptions

Communicating across languages necessarily means communicating across cultures. Cultural assumptions in the United States may differ from those of other places. Some employees have grown up in countries without retirement plans, where the assumption is that individuals

do not save for their own retirements, but rely on family in old age. Presenting the ESOP as a retirement program may seem less relevant to employees from such cultures. Companies may need to reframe ESOP benefits to align with the values of ELL employees. For instance, companies could emphasize how the ESOP might help support the participant's family—providing money in the unfortunate circumstance of death or disability, or providing additional financial resources to help the family when the participant can no longer work. Stories of how the ESOP has helped other employees in challenging circumstances can also illuminate its benefits.

Other Practical Considerations

Employees with family in another country may wonder if they can still receive their ESOP benefit should they choose to return to their home country or designate a foreign beneficiary. Companies must communicate to employees the importance of beneficiary forms and the need to keep their on-file address up-to-date after they leave, especially if there is a long delay before they receive their distributions. Some companies make direct wire transfers to other countries to facilitate distributions to terminated participants.

Occasionally, companies may have to change their actual ESOP plan rules to include more ELL employees. One nursery and landscaping ESOP company had a large number of ELL seasonal workers who never met eligibility and allocation requirements. To include these employees in the ESOP and demonstrate their importance, the company changed its plan rules, reducing eligibility and allocation requirements so that more people (mostly ELL employees) could participate. Carris Reels, a 100% ESOP-owned company that manufactures industrial reels, even created a phantom stock program in its Mexico plant in order to mirror the ESOP under Mexican law and regulations.

A Culture of Inclusion

For ELL employees to be fully engaged as owners, they must feel valued by the company, trust its leadership, see opportunities for themselves to grow and develop, and be able to influence and contribute to the company.

Legal Requirements

Current federal requirements for ESOP communication in foreign languages are minimal. When distributing the summary plan description (SPD) to participants, companies must provide a notice in a specific foreign language saying that assistance is available for understanding the SPD, if speakers of the same foreign language exceed a certain number or percentage of the company. For companies with fewer than 100 people, the notice must be provided if 25% or more of the participants are only literate in the same foreign language. For companies with more than 100 employees, this rule applies for the lesser of 500 participants or 10% of all participants who are only literate in the same foreign language. There is no requirement to translate the SPD itself.

As with English ESOP communication, fulfilling only the legal requirements for ESOP communication to employees will not build much motivation and excitement. Companies that want to build an ownership culture do much more.

Companies committed to integrating ELL employees translate as much communication as possible, including performance updates, all-company meetings, and benefits explanations. They may use written materials, translators, smaller-group same-language presentations, or other creative approaches. Carris Reels posts management updates and decisions on boards in English and Spanish. Muir Omni Graphics, a manufacturer of decals and industrial graphics in Peoria, Illinois, with fewer than 50 employees, has many Vietnamese and Chinese employees. Its smaller size makes it difficult to find translation resources, so the company usually communicates using pictures. For example, in a financial education session, the company played a guessing game using pictures of a gallon of milk, paint, and ink, so that employees could begin to understand printing costs.

Companies can make it easier for ELL employees to obtain information and ask questions about their benefits. Securing vendors (e.g., health insurance companies) with translation capabilities can be valuable. Other companies provide a Human Resources hotline staffed by bilingual staff, allowing employees to ask questions privately. When ELL

employees speak less common foreign languages, companies may need to seek out external translation services. As mentioned earlier, many can be easily accessed by phone, without a translator being present in person.

Fostering social connection among employees, whatever language they may speak, can strengthen their sense of community and ownership. English speakers can take small steps to engage and develop meaningful relationships with ELL employees, such as learning phrases in their language, being aware of key holidays or celebrations, and taking the time to connect, even if it might be through pictures, gestures, or facial expressions. Partnering together on work-related teams, cross-functionally or within each department, can build relationships across linguistic barriers.

Companies can also invite questions, ideas, and input from ELL employees. Creating an environment where ELL employees can play an active role in shaping how they want to be involved will provide the company with the best plan. There is no better way to learn how to engage a group of people than to ask them how they wish to be engaged. Carris Reels has local ownership culture committees at many of its locations. Bilingual speakers often serve on these committees, where they can shape communications, education, and celebratory events for their facilities. Employee resource groups (ERG)—voluntary employee-led groups to foster more diverse and inclusive workplaces—can be another way to include the voices of ELL employees, giving them an opportunity to support one another and to suggest and implement improvements for the company. These improvements could be internal for the company's workplace practices, or external for the company's products and services, and outreach to customers, vendors, and partners. ERGs are commonly created to promote diversity and inclusion for other groups as well, such as women, LGBTQ employees, and employees with disabilities.

When asking ELL employees for their feedback, it is important to remember that many cultures have stronger power-distance assumptions than the United States. In other words, people attribute more power to people in positions of formal authority. In practice, people from higher power-distance cultures may be reluctant to disagree with their manager, suggest new ideas, or criticize the decisions or actions of more senior employees. Contributing ideas and suggestions to improve the company may feel countercultural to some ELL employees. Companies

can tweak their message to be more compelling. For instance, many high power-distance cultures are more group-oriented. Companies could frame their solicitation of employees' ideas for improvement as a way of supporting the company or supporting their peers (e.g. "Help us figure out how to be safer," or "The company will be better if you can think of ways to provide faster delivery on our product"). Certain settings can help: people may have an easier time talking in small groups in their primary language, rather than offering ideas one-on-one with their manager or in a large group setting.

Leadership Roles

Developing and promoting ELL employees into managerial and leadership roles sends a clear message that ELL employees have a career path within the company. Companies also benefit from tapping into more of the leadership potential of the workforce, and gaining broader perspectives on their management team. Language barriers frequently make it easy to overlook people's knowledge and skills, so companies may need to make extra efforts in their hiring and promotion practices. PC Construction promotes Spanish-speaking field workers to foremen and superintendents by regularly asking superintendents for recommendations.

Companies have also found ways to actively support the leadership development of ELL employees. Carris Reels created a Spanish leadership cohort group. Eight employees in leading positions from different plants meet by video conference once a month to discuss successes and challenges in their roles. Carris' vice president of manufacturing, who is bilingual, facilitates this conversation. While many leaders in the Spanish-language group do speak English and could participate in Carris' parallel English-language groups, the company felt that a Spanish-language group would give employees the best opportunity to improve their skills as leaders. So far, the group has been a success, and another is starting in the next year.

ELL speakers may need to strengthen their English in order to succeed in higher leadership positions. Companies often provide professional development and training resources for those wanting to learn English, as well as those wanting to learn Spanish or another language

spoken in the company; these might include tuition reimbursement, private tutoring, or language learning software such as Rosetta Stone. At PC Construction, one field site organized informal English and Spanish classes so that employees would have an opportunity to learn from one another. Another ESOP company contracted with its local community college to offer a formal English class for employees, which met in the mornings before their shift started. Many ELL speakers report that they learned English primarily on the job while working with English speakers, again emphasizing the importance of mixed-language work teams. When ELL speakers do not have the time to learn English, companies can look for or create leadership roles that do not require English-language skills. Some examples include serving on a bilingual committee or taking on work responsibilities that require less English proficiency.

Even with bilingual leaders with English fluency, companies can take care to communicate clearly and deliberately. It may be harder to understand casual expressions or if people talk quickly or mumble. It can also take longer for someone to collect their thoughts and express themselves in their non-primary language. These often-hidden barriers make it more difficult for ELL and bilingual employees to suggest ideas, express their opinions, and fully participate in making good decisions for the company.

Furthermore, good meeting practices enable everyone to participate fully. These might include establishing a clear agenda and preparation in advance, encouraging and checking for participation from all attendees, and using flip charts and other visual aids. Such practices benefit everyone, not just ELL speakers.

Conclusion

Linguistic diversity within our companies can be an enormous asset. Beyond the United States' changing demographics, we have become more connected with the world beyond our borders. Many ESOP companies have offices in other countries, and our vendors, partners, and customers may live in or come from different countries and speak different languages.

Given such a landscape, it becomes ever more important to understand other cultures and engage with speakers of different languages,

whether they are internal or external to our companies. Gaining fluency in navigating cultures and languages strengthens a company's ability to connect with vendors, customers, and current or potential employees. Engaging ELL employees contributes to building a compellingly inclusive company culture: one that can fulfill the performance potential of employee ownership.

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