



Company of the Year Submission 2015
IA/NE Chapter of The ESOP Association

The year was 1946 when Lawrence Youngman started a travel company in Omaha, Nebraska, known as Travel and Transport. He had “two second hand desks, one typewriter and a world of ignorance.” The first ticket sold was to a friend of Youngman’s who wanted to take a trip to New York City. Youngman bought the ticket at retail price from the United Airlines counter at the airport and sold it to his friend at retail price.

Who would have guessed 68 years after such a humble start, present-day Travel and Transport would not only be a fiscally thriving global travel management company, but thanks to Youngman’s passion for his company and coworkers, would also be 100% employee-owned.

Located in 37 states and employing more than 1,200 employee-owners, Travel and Transport provides corporate travel solutions, meeting/event planning services and unforgettable vacations. We are an S Corp ESOP and have been 100% employee-owned since 2002. We utilize an independent trustee to serve as our ESOP trustee.

Our mission as employee-owners is to earn our customers’ business everyday through our passion, innovation and commitment to excellence. In 2012, we recognized that while we had an ownership-like culture, the education about our ESOP was lacking. To fill that void, our ESOP Communication Team (ECT) was formed to educate, empower and engage our employee-owners.

Travel and Transport makes a contribution to the Employee Ownership Foundation, and we have been a long-time sponsor of various IA-NE ESOP events.. Travel and Transport has also been voted Best Place To Work in Omaha for both 2013 & 2014 and voted Best Travel Agency in Omaha by Omaha Magazine for five consecutive years, including 2014.

Jim Winterscheid, Travel and Transport’s Vice President of HR, has been a longtime advocate of ESOPs and employee-ownership and is currently serving on the Executive Committee for the Iowa/Nebraska Chapter of The ESOP Association as well as the ESOP Ownership Cultural Committee. Valeri McMahon, Vice Chairperson of our ECT, is also serving on the Executive Committee. Lori Bauer, Chairperson of our ECT has served as co-presenter at 3 conferences.

While putting together our entry for AACE this year (Special Events & Promotions) it was apparent that Travel and Transport has a lot going on when it comes to building an employee-ownership culture.

Highlights for 2014:

- **ESOP Communication Team (ECT)** - continues the task of educating owners about the ESOP. They meet yearly in Omaha and again at the national conference in D.C. Some members also attend and/or present at other conferences.
- **Continuing Education**
 - **“Welcome to the ESOP”** - Quarterly presentation (webinar if necessary) by Jim Winterscheid for those celebrating their 1 year anniversary

- **ESOP 101** “World Tour 2014”– Jim Winterscheid and Nancy Miller traveled to all branches with an ESOP presentation so the owners would have face-to-face interaction. Jim also held several different webinars over the summer/fall in 2014 for the virtual owners. This was open to all employee-owners; even those who weren’t yet official plan participants.
- **Intranet Site** - We have an extensive intranet site dedicated to the ESOP; links to The ESOP Association, NCEO, internal newsletter, ESOP 101 information, articles, poster contest winners, announcements, etc.
- **Employee Ownership Month** (see quotes about EOM at the end of this doc)
 - **Eggs & ESOP** - 20 participants, our ECT and Victor Aspengren as guest speaker.
 - **Birthday Potluck** – Branches around the country celebrated our 68th Birthday by gathering together for potluck lunches.
 - **Hats off to the ESOP Contest** – Participants wore hats during the potlucks for fun. The handmade “ESOP” hats were judged for creativity. One branch winner and one home winner were chosen. The prize: lunch or dinner in the employee-owners hometown with our President and COO. One of the winners (and a guest) has already enjoyed lunch with the officers and made this comment “Kevin and Tim, were so fun and down to earth, they treated us like we were family.” This sentiment is exactly why we created the contest. We’ll surely continue something similar for next year.
 - **Poster Contest** – 2nd annual contest winner was announced during EOM (poster will be submitted to The ESOP Associations national contest).
 - **Trivia Contest** – This is by far the most popular contest that engages the largest number of employee-owners at the same time. A daily “trivia” question is sent out during EOM (about Travel and Transport, ESOP, employee-ownership, etc). Daily winners are chosen from correct entries for a cash prize equivalent to the number of years we’ve been in business (2014 = \$68). A weekly and grand prize (airline tickets, of course) is also given out. The questions are fun and engaging. Employee-owners note that they have fun discussing the questions with their team to make sure they have the correct answer before sending it in. This is also most instrumental in engaging the virtual employees.
- **Management Support** – All our officers including our President, support efforts to sustain a culture of employee-ownership; sharing company information, supporting our ECT, helping with fundraising events, and being present at parties, potlucks, etc.
- **Milestone celebrations** - It is common place to celebrate birthdays, anniversaries and retirements.
- **Annual Shareholders Meeting** – The “Guess the Share Price” contest has been popular for many years and video of the meeting is available online for those that couldn’t attend.
- **Mid Year State of the Union Address** – every summer our CEO presents a midyear assessment of our business, economic conditions, and markets to our employee owners. The impacts of each of these are explained in terms of the effect they will have on each of us as owners of Travel and Transport, Inc.
- **Lobbying** - We have met with every Nebraska congress or senate member (or their aides) in their D.C. office for the past 6 years.

- **Community Involvement for 2014**
 - “Sand in the city” – A Travel and Transport Team participated in created a giant sand sculpture to raise money for the Nebraska Children’s Home Society (<http://www.sandinthecityomaha.com/>)
 - Food Bank for the Heartland’s Strike Out Hunger campaign – Employee-owners held bake sales and cook-outs at Travel and Transport and donated on-line to help this local cause (<https://www.travelandtransport.com/blog/general/travel-and-transport-helps-strike-out-hunger/>)
 - Participation in local and regional events on behalf of Make A Wish foundation, American Lung Association, American Cancer Society, Cystic Fibrosis Association, Susan B Koman Walk for the Cure, etc...
 - Many branches, especially during the holidays, gather donations for families in need or “adopt-a-family”. In true employee-ownership spirit, this isn’t a formal project sponsored by Travel and Transport, it just happens!
 - Our officers are also individually involved in numerous philanthropic organizations
- **Succession Planning** – In January of 2014, our former executive vice president, Kevin O’Malley, was named President of Travel and Transport. Our form President, Bill Tech, stayed on for the year as CEO and jubilantly retired in December if 2014 . The transition was well planned, communicated, and carried out. <https://www.travelandtransport.com/blog/general/success-esop-company/>
- **ESOP Memberships**
 - Member of The ESOP Association
 - Member of NCEO (login is available on our intranet so employee-owners can login if they want to learn more)
 - Member of ESCA (new for 2014)
- **Social Media** – Check out our pages for pictures and snippets of what we’ve been up to
 - <https://www.facebook.com/travelandtransport>
 - <https://www.travelandtransport.com/blog/>
 - <https://twitter.com/TandTNews/>
 - <http://www.pinterest.com/tandtpins>

Travel and Transport has a great culture and plans to continue educating, empowering and engaging their employee-owners on the benefits of being an ESOP company. Below are a few quotes from our employee-owners experience during EOM.

- *" I am new to the company so this gave me the opportunity to learn more about Employee Ownership. Thank you sooooo much!!!!"*
- *"EOM has been fun to take part in and the fact that we learn something about ESOP is a bonus. Thanks for putting this contest together each year!!"*
- *" I enjoy the questions during the month. Our office had a potluck and it was very yummy! I think it's educational when Jim and Nancy come to the offices to talk about ESOP as well as educate everyone as to what we can do to make our ESOP even better!"*
- *"I always enjoy the question of the month part :) And the FOOD (of course!)"*
- *" Finding out all the good stuff that the company provides to us. It's great working for an employee owned company. Can't imagine working anywhere else!!!!"*