

OWNING THE WORK · CHAPTER EIGHT

The Field Manual

Chapter Eight of Owning the Work

Ammanuel Santa Anna

Santa Anna, A. (2026). The Field Manual. In Owning the Work (ch. 8). Luminous Prosperity Inc. https://doi.org/10.5281/zenodo.23989572
Luminous Library Licence 1.0 · business.hautelumiere.life/library/owning-the-work

THE LICENCE

The Field Manual
Chapter Eight of Owning the Work

Owning the Work · Chapter Eight. The Haute Lumière edition, 2026. © 2026 Ammanuel Santa Anna.

Released under the Luminous Library Licence 1.0 (hautelumiere.life/library-licence): free to read, share, quote, translate and teach, non-commercially, for ever. The Author keeps every other right, including every commercial right.

Published by Luminous Prosperity Inc. for Haute Lumière. Author ORCID 0009-0008-3244-0306.

DOI 10.5281/zenodo.23989572 · this record's page: business.hautelumiere.life/library/owning-the-work/08-the-field-manual/

Please cite as: Santa Anna, A. (2026). The Field Manual. In Owning the Work (ch. 8). Luminous Prosperity Inc. https://doi.org/10.5281/zenodo.23989572

Chapter Eight of Owning the Work. The whole book, with every chapter, is at business.hautelumiere.life/library/owning-the-work (DOI https://doi.org/10.5281/zenodo.23988988).

A NOTE BEFORE YOU READ

This work is offered for education and leadership development. It is not legal, financial, accounting, investment, medical or psychological advice; take the advice of a qualified professional who knows your circumstances. Companies and events are described from the public record as the author understands it; characterisations are the author's analysis. Examples are illustrative, and no particular outcome is promised to any reader.

ABSTRACT

This chapter is written to be used. It sets out, week by week across one year, a sequence a leader can run to bring shared ownership into a firm in the order the evidence and the house's reading both suggest: information first, voice second, the share third, permanence last. It names the roles, the decisions and the documents at each stage, and it says where the work must stop and wait for advisers. It is not a legal or tax plan, and it does not choose a structure for any firm. A firm that intends to sell to its employees through an ESOP, an employee ownership trust or a cooperative conversion will need lawyers, valuers and, in most cases, lenders, and their timetables will govern the last quarter of this year. What this manual governs is everything a leader can do before and around them, which is most of what decides whether the structure, once it exists, will work.

CHAPTER EIGHT

The Field Manual

A year, in order

This chapter is written to be used. It sets out, week by week across one year, a sequence a leader can run to bring shared ownership into a firm in the order the evidence and the house's reading both suggest: information first, voice second, the share third, permanence last. It names the roles, the decisions and the documents at each stage, and it says where the work must stop and wait for advisers.

It is not a legal or tax plan, and it does not choose a structure for any firm. A firm that intends to sell to its employees through an ESOP, an employee ownership trust or a cooperative conversion will need lawyers, valuers and, in most cases, lenders, and their timetables will govern the last quarter of this year. What this manual governs is everything a leader can do before and around them, which is most of what decides whether the structure, once it exists, will work.

The sequence is drawn from the earlier chapters. Chapter 2 found that ownership works when it comes with information, voice and fair treatment. Chapter 3 set out six ways it goes wrong, each with a design answer. Chapter 4 argued that the safety signal arrives through evidence, so evidence should come first. Chapter 5 worked a composite bakery through the first two steps. Chapter 6 showed that every lasting structure took years, and was built last. This manual puts those findings in the order a working week can carry.

It is written for a firm of between about thirty and five hundred people, which is where most of the research's worksites sit and where most succession decisions are made. A smaller firm can compress it; a larger one should run it unit by unit, for the reason Chapter 3 gave: the free-rider problem grows with the size of the unit, and sensing works where people can see each other.

Before week one: the three roles

Three roles carry the year. In a small firm one person may hold two of them; they should never all be held by the owner.

The sponsor is the person with authority over ownership: the owner, the founder, the board chair. Their job is to make decisions on the dates the manual sets, to say in public what they have decided and why, and

to stay out of the rooms where people need to speak freely about them. A sponsor who attends every session will hear only what people say in front of a sponsor.

The steward of the year is the person who runs the sequence: books the sessions, keeps the records, chases the advisers, writes the monthly note. It is usually a senior operations or people leader. They need the sponsor's trust and the floor's. Their most important skill is keeping a record that nobody has edited.

The working group is six to twelve people drawn from across the firm, chosen as far as possible by their colleagues rather than by management. They read the numbers before anyone else does, carry questions in both directions, and draft the parts of the plan that most affect the people they come from. They are the first sensing organ the firm grows on purpose.

The Luminous 100, the house's catalogue of familiar strategy tools carried into living-systems terms, warns against the usual way of running a programme like this. Writing about objectives and key results, it says that "cascading OKRs down the org chart is a mechanistic practice that fragments the living whole." The working group exists to stop the year being cascaded. It lets the plan be shaped by the people it will shape.

Quarter one: information

Weeks 1 to 2 · The inventory

The steward completes the Ownership Inventory from Chapter 2 with the finance lead. Every arrangement is recorded as a form, not an intention: the profit share, the bonus pool, the retirement match in company stock, the options, any trust. People are counted, not plans. Part B, the relationship around the arrangements, is completed honestly, including the line that asks when an employee-owner's suggestion last changed a decision.

Decision for the sponsor, end of week 2: Is this inventory accurate, and may it be shared with the working group? The answer should be yes. If it is not, the year should not begin.

Weeks 3 to 4 · The working group forms

The steward invites nominations from each team. Where a team cannot agree, the steward draws a name. The sponsor addresses the whole firm once, in person, and says four things: that the firm is examining how its people share in what they make; that nothing has been decided; that a working group drawn from across the firm will see the numbers first; and the date by which the first decision will be made. The sponsor names that date and keeps it.

The finer point is what the sponsor does not say. They do not promise ownership, a figure or a structure. A promise made before the numbers are understood is a promise likely to be broken, and the evidence of Chapter 4 is that a broken promise teaches people to face outward.

Weeks 5 to 6 · The four numbers

The working group chooses, with the finance lead, four figures that will be posted monthly where everyone can see them. Chapter 5's bakery chose sales against the same month last year, waste, on-time delivery and pre-tax profit for the year to date. The principle for choosing is the one Chapter 5 set out: figures that people can affect and that move often enough to be watched, plus at least one figure that shows what the firm earns. Leaving profit off the wall tells everyone that the real number is a secret.

The finance lead writes a one-page explanation of each figure in plain words: what it is, where it comes from, what moves it, and what it cannot show.

Week 7 · The first posting

The four numbers go on the wall, on paper and wherever the firm's people actually look: the canteen, the depot, the shared drive, the shift handover. They go to everyone at once. A figure seen by the office a week before the floor is a figure that has already told the floor where it stands.

Weeks 8 to 12 · The monthly session

The steward holds the first monthly session: thirty minutes, open to all, on the numbers. Anyone may ask a question. Every question is answered on the record, in writing, within a week, including the questions whose honest answer is *we do not know yet* or *we will not change that, and here is why*.

The first two sessions are often quiet. That is normal and is not a reason to stop. The bakery in Chapter 5 heard its first useful question at the third session, about a flour delivery that held up Monday mornings, and the answer cost nothing. Most firms will find their own version within a month of asking. The Luminous 100's reading of Lewin's change model offers the questions a steward can bring to a quiet room: "What is already softening? What is ready to flow?"

Decision for the sponsor, end of week 12: Will the monthly numbers and the monthly session continue regardless of what is decided about ownership? The answer should be yes, and it should be announced. This is the first irreversible step of the year, and it is deliberately the cheapest.

The quarter's record

At the end of the quarter the steward writes a one-page note to everyone: what was posted, what was asked, what was answered, what changed. It is the first entry in a record that will run all year. Chapter 4's dispatch manager kept a sheet headed *What you raised, and what happened*. The firm now keeps one too.

Quarter two: voice

Weeks 13 to 14 · The Two Directions Audit

The steward runs the Two Directions Audit from Chapter 4: the anonymous eight-question survey for everyone and the one-page review for leadership. It is the baseline for the whole year. Results are reported by team to the working group and in summary to everyone, and the summary includes the worst result as well as the best.

Weeks 15 to 18 · The Risk and Voice Check

The working group completes the Risk and Voice Check from Chapter 3 with the steward and the finance lead. It is the most important document of the year, because it names, before any design is chosen, the six ways the firm's plan could go wrong. The finer points:

On one basket. The group records whether any existing reward is paid in place of a market wage. If any is, the first design principle of the plan is written down now: every share will come on top of a market wage.

On free riders. The group records the size of the smallest unit whose results could drive a share. If it is larger than about a hundred people, the group proposes how the plan might share part of the pool by unit.

On voice. The group records how often results are shared, who sees them first, and whether employees have any seat where decisions about rewards are made. The working group is itself the first such seat; it should say whether it wants to continue after the year.

On the shield. If the firm is considering an ESOP or trust, the group records who would appoint the trustees. It recommends now that some trustees be elected by employees.

On drift. The group lists the measures other than profit that will be reported each year. Chapter 9 offers a set.

On who is left out. The group counts contractors, temporary staff and part-timers, and proposes how each will be treated. It reads the allocation formula of any existing plan with the lowest-paid person in mind.

Weeks 19 to 20 · The question forum becomes a council

If the monthly session has worked, the working group proposes that it become a standing council: elected, with a written remit, meeting monthly, with the right to see the full accounts quarterly under confidentiality and to put questions to the sponsor in writing. The remit is short. It says what the council may see, what it may ask, what it may propose, and what it may not decide.

Decision for the sponsor, end of week 20: Will the council be established, with a remit in writing? A council without a written remit drifts; a council with one can be held to it, by both sides.

Weeks 21 to 24 · Teaching the plan

Whatever the firm already has, a retirement match, a bonus pool, a trust, the steward arranges for it to be taught. An owner who does not understand what they own cannot act like one. The session is an hour, repeated for every shift, with the plan document available and a person who administers it present to answer questions. Chapter 11 sets out the questions a household should bring; the steward circulates them in advance.

Weeks 25 to 26 · The half-year note

The steward writes the second quarterly note. It includes the audit baseline, the Risk and Voice Check in summary, the council's remit and the first questions the council has asked. It also says, plainly, what has not yet been decided.

Quarter three: the share

Weeks 27 to 30 · Modelling the profit share

The working group, with the finance lead, models a profit share using the Readiness Sheet from Chapter 5. The finer points from that chapter govern the work:

Price it at net cost. Fold existing discretionary rewards into the pool and show the true decision.

Decide the split in writing, with reasons. Chapter 5's bakery split half equally and half by pay, so that the night baker and the sales manager received the same first share. Every split favours someone. The record of why is what makes it fair.

Model the bad year before the good one. Show everyone what the share would have been in the firm's worst year of the last five.

Keep the share on top of the wage. This is the single most important protection for the household on the other side of the plan.

Include part-timers. Pro rata to hours, from the first period.

The group prepares three options, not one, and writes what each does and does not do.

Weeks 31 to 32 · Consultation

The three options go to the council and then to everyone, at a session on every shift. The steward records every objection. The working group revises.

Decision for the sponsor, end of week 32: Which option, from when, and paid how often? The sponsor announces the decision in person, as the bakery's owner did on the packing floor in Chapter 5, saying what it

would be in a normal year and in the worst year, that it comes on top of wages, why the split is as it is, and what it is not. "This is not ownership of the firm" is a sentence worth saying aloud, if it is true, so that nobody mistakes the first step for the last.

Weeks 33 to 39 · The first period

The share runs. The four numbers stay on the wall. The council meets. The steward writes the third quarterly note, which includes the first estimate of what the share will be at the end of the period, and why it might differ.

Quarter four: permanence, begun

Weeks 40 to 42 · The second audit and the first payment

The first share is paid, on the date promised, with a statement for each person showing how it was calculated. The steward runs the Two Directions Audit a second time and compares it with the baseline. Chapter 9 sets out how to read the comparison without fooling oneself.

Weeks 43 to 46 · The permanence questions

If the sponsor intends to pass ownership to the people who work in the firm, this is when the question is opened, in writing, with the council. The sponsor completes the Permanence Questions from Chapter 6: what the firm should go on doing after its present owners, who should hold the vote and who the gain, how the owners should be paid, and how long the work should take. The council responds in writing.

The sponsor engages advisers now and not before. A lawyer, a valuer and, if the route requires one, a lender will set their own timetable, and it will usually run well past the end of this year. That is as it should be. The firms in Chapter 6 took between two and five decades to complete their structures. A firm that has spent a year building information and voice, and has paid a share on time, enters the conversation about ownership with the relationship that ownership is meant to formalise.

Weeks 47 to 50 · The route sheet

The council and the sponsor complete the Two Roads Sheet from Chapter 7 together. The boundary questions in its fourth part are answered before any structure is drafted: who will be inside, who outside, and what happens to the people outside the line if the firm grows or shrinks.

Weeks 51 to 52 · The year's account

The steward writes the year's account: what was done, what changed, what was learned, what was not achieved, and what comes next. It goes to everyone. It ends with the structural question from Santa Anna's

book, the one Chapter 5 borrowed: if this firm could redesign one structural feature of its working life, what would it be?

When to stop or slow down

A manual that only goes forward is a manual for a firm that does not exist. Four conditions should slow or stop the sequence, and the steward should say so in writing when one arises.

When the numbers are bad. If the firm enters a hard year in the first two quarters, the information and voice steps continue and the share is delayed. A share introduced into a falling year pays little and teaches the wrong lesson. Open numbers in a hard year, honestly explained, build more trust than any share.

When the sponsor's intention changes. If the sponsor decides to sell to an outside buyer, the steward should say so to the council at once. Discovering it later is the single event most likely to turn the attention of a whole workforce outward for years.

When the audit gets worse. If the second Two Directions Audit shows more outward-facing attention than the first, the cause should be found before the next step is taken. It is usually a broken promise, a figure that went missing from the wall, or a question answered in a corridor instead of on the record.

When the council stops asking. A council that asks no questions for two months is either satisfied or afraid. The steward should find out which.

The finer points of the whole year

Keep every date. The single cheapest way to build trust is to do what was said on the day it was said. The single cheapest way to lose it is to move a date without explanation.

Write everything down. A question answered in a corridor reaches one person; a question answered in writing reaches everyone, and can be checked later.

Separate the steward from the sponsor. The person who decides should not also be the person who runs the rooms where people speak about the decision.

Prefer the small step that will last to the large step that might not. Four numbers on a wall, kept for a year, are worth more than a large plan announced and quietly abandoned.

Let the evidence lead. At every stage, the research in this book points the same way: ownership with information and voice does more than ownership alone. Where the sequence has to give, it should give on the size of the share, not on the information or the voice.

Santa Anna's book has a phrase for the size of step this manual begins with. Among its reflection questions, it asks for the smallest experiment a reader could begin, "Not a grand transformation, but a" seed,

"something small enough to start this week." Week one of this manual is that seed. It is an inventory, completed honestly, and a decision to share it.

The lineage's volume on gainsharing (*The Gain Was Always Shared*) covers the related history of plans tied to measured improvement, which some firms run alongside a profit share. Where a firm wants to see on one page everyone its ownership touches before deciding where the boundary lies, the Alpha Papers' reading of stakeholder mapping is a natural companion to weeks 15 to 18.

The Tool: The Year Plan

One page for the steward, kept on the wall of the room where the working group meets. Fill in the dates in pencil in week one; ink them as each is kept.

WEEKS	STEP	OWNER	DATE	DONE
1–2	Ownership Inventory complete; sponsor approves sharing	Steward, finance lead		
3–4	Working group formed; sponsor addresses the firm	Steward, sponsor		
5–6	Four numbers chosen and explained	Working group, finance lead		
7	First posting, to everyone at once	Steward		
8–12	Monthly sessions; every question answered in writing	Steward		
12	Sponsor commits to keep numbers and sessions	Sponsor		
13–14	Two Directions Audit, baseline	Steward		
15–18	Risk and Voice Check	Working group		
20	Council established, remit in writing	Sponsor, working group		
21–24	Plan teaching, every shift	Steward, plan administrator		
27–30	Profit share modelled: three options, bad year first	Working group, finance lead		
31–32	Consultation; sponsor decides and announces	Sponsor		
33–39	First period runs	All		
40–42	First payment; second audit	Steward, finance lead		
43–46	Permanence Questions; advisers engaged	Sponsor, council		
47–50	Two Roads Sheet	Sponsor, council		
51–52	The year's account, to everyone	Steward		

Stop or slow conditions (tick if any applies, and write why): bad numbers ☐ · change of sponsor's intention ☐ · audit worse ☐ · council silent ☐ · _____

The Field Manual

Ammanuel Santa Anna · Luminous Prosperity Inc. · Haute Lumière

Set in Cormorant Garamond and Manrope.

Read the Business Library at business.hautelumiere.life/library.

Luminous Library Licence 1.0 · hautelumiere.life/library-licence

REQUEST A CONVERSATION

business.hautelumiere.life/book/?kind=gainshare

The Business Library

business.hautelumiere.life/library/

The packages

hautelumiere.life/pricing/