

## THE ERG SUSTAINMENT TOOLKIT

#### Best Practices for Sustaining Employee Resource Groups

Members: Darion, KB, Jess, Steven, Adriana, James Advisor: Christine Mobley Meet the Capstone Group 16

- James Davis AAA
- Steven Del Gaizo General Motors
- Darion Colbert Magna International
- Jess Gallegos Vitesco Technologies
- Adriana Villegas Vitesco Technologies
- Karen Bryant DEVCOM



## "No culture can live, if it attempts to be exclusive." - Mahatma Gandhi



# Why focus on ERG sustainability?

- We believe ERGs can have an immense impact on making inclusion a reality in an organization
  - □ Making the physical work environment better for everyone
  - □ Bringing employees together to share their experiences
  - □ Identifying and developing leaders in the making
  - □ Lowering the chance of suppressed frustrations
- Our team has experience building and sustaining ERGs in different organizations
- We have experienced and overcome numerous challenges while engaging in this work and would like to pass along the knowledge and resources



### Identifying the Challenges Phase 1



### An ERG's Failure to Thrive

### Challenges that ERGs face that lead to failed effort

- Inability to gain/maintain administrative support for ERGs
- Failure to secure sustainable resources for ERGs
- Lack of access to ERGs for all employees
- No ERG governing structure
- Inability to define/measure success and impact of ERG
- Lack of succession; planning & management of ERG turnover
- Inability to foster meaningful ERG participation and engagement



### Collecting our Experiences Phase 2



### Our Experience with the Challenges

#### **Personal Experiences**

- Gaining/maintaining executive and administrative support Creating org chart with governance structure up front with clear roles
  - Incorporated data protections and compliance
  - Started with pilot for women
  - Vitesco Technologies ERGs supporting, women, parents, disability
  - Executive support is vital
  - Funding for ERGs
    - Securing a budget for the group really expands what is possible Growing the budget with the maturity of the ERG
- Succession planning and managing staffing changes/turnover
  - · Need to be clear about the terms for the roles
  - ERG leaders have the most responsibility and will need the opportunity to transition out of the role
    - Vitesco Technologies ERGs enable people to transition out at any time because it is voluntary
- Recruiting is important
- Securing sustainable resources
  - Proposed event timeline with 1 or 2 activities per month At the beginning there weren't a lot of resources It was hard to pull people in to meet the proposed timeline
  - · Learned it's important to prioritize your time since participation is voluntary
  - Rather than having volunteers commit to each event for the whole year they select 3 events that they will support
- Managing meaningful participation and engagement
  - · Consistently working with internal communications to promote the ERGs
  - Integrate ERG calendars with communications the whole year talking about ERG
  - activities (communications team even requests the information)
  - Utilize all employee meetings
  - Focusing on intersectionality
    - Forming networks and working collaboratively with other ERGs Hosting joint events, sharing learning, leverage different ideas, projects
  - lessons learned
- Accessibility to all levels of employee status/role Currently most activities focus on white collar and administrative roles
  - Goal to expand reach to blue collar and shop floor employees 0

  - Shop floor employees have very limited time and are constrained by maintaining
  - productivity Thinking about additional demand for training and communications in a short amount of time with a large number of employees on different shifts
  - Really need to focus on engaging the shop floor
- Defining/measuring success and impact
  - Tracking participation in events for virtual events but it is challenging to track participation in all of the initiatives depending on the type

- Could be in person, charitable contributions, etc.
- Could survey members of the ERG about the impact It's important to define measurable goals at the beginning of each year for each
- ERG
- Specific actionable goals to work towards
- Gathering resources for the specified community
- Ensuring resources are available, accessible, people can find them Need to establish a strong communication strategy that works for the company
- and the ERG
- How well is the ERG creating a community?
- Social events family day, happy hour
- Uplifting marginalized community Career development and advancement

  - Equipping future leaders Should be included in all of the ERGs
  - Building mentoring and creating connections
  - Mentoring doesn't have to be just about career development
  - · It could include coming out or transitioning at work for example It could be a support group or mentor talking about disabilities
- Volunteer events and logging hours of participations
- Partnering with local organizations in the community
- Influencing the company's marketing plans advancing representation in products, ads, and messaging
  - Shows support
  - Recognized that product we create may not be accessible but we can signal that it is possible
  - Especially in the disabled community
  - Products designed for accessibility from the start
  - Could be phase 2 or 3 impacting the companies inclusion internally and externally
- Track the number of information sessions done
  - Like inclusions messages, panel discussion
- Track the requests that you get and people that you talk to
- Self ID metrics participation
  - Tracking progress within the ERG community
- Engagement scores for the ERG community compared to the rest of the company
  - What is there employee sentiment
- · Tracking company metrics by identity can be really helpful for the ERGs when
- setting goals Partnering with Talent Acquisition - how are we bringing talent in?
  - Developing a plan to bring in diverse talent
  - Can be especially difficult in the queer community
  - How do we find disabled talent, veteran talent, etc.?
- Designing governing structures of ERGs
  - Training & education of ERG leadership
  - Started different ERG's within each country the same structure and activities but moved to combined regional activities to share resources



Having group

experience

from these

meetings revealed a

wealth of shared

knowledge and

We collected notes

basis for the project

discussions as a

© CENTER FOR AUTOMOTIVE DIVERSITY, INCLUSION & ADVANCEMENT, INC. - ALL RIGHTS RESERVED

8

- Who are we partnering with?
- · Recruiting conferences for example

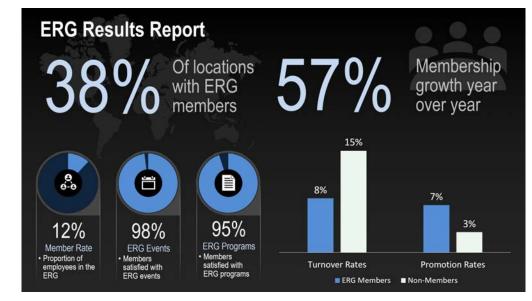
### Creating a Valuable Resource Phase 3



### The ERG Sustainment Toolkit

- Our aim was to develop a resource for practitioners
- We started with the idea to share best practices
- Our project advisor helped identify an opportunity to gather practical templates to accelerate the impact

### Example template





### The ERG Sustainment Toolkit

### **ERG Toolkit Topics**

- Best practices for overcoming ERG challenges
- Tools for gaining/maintaining administrative support
- Tools for securing sustainable resources
- Tools for employee accessibility
- Tools for creating governing structures
- Tools for defining/measuring ERG effectiveness
- Tools for planning and management of ERG personnel turnover
- Tools for maintaining meaningful ERG participation



### Deliverable Examples Best Practices and Template





### Gain/Maintain Executive and Administrative Support

- Create an organization chart with governance structure up front with clear roles
- Incorporate data protection and compliance
- Start with a pilot for one employee group
- Secure a budget up front to expand options for initiatives and programs
- Plan to grow the budget with maturity of the ERG



### **ERG Program Guidelines**

- Introduction
- Establishing an Employee Resource Group
- Employee Resource Group Operating Principles
- Employee Resource Group Program Prohibitions
- Non-Discrimination
- Limitation of Liability Disclaimer



#### INTRODUCTIO

Thank you for your interest in creating an Employee Resource Group at YOUR ORG HERE. The YOUR ORG HERE definition of an Employee Resource Group is a group of employees, with varied status, who actively engage in communicating and/or gathering around a central unifying purpose, mission, background or activity.

YOUR 00B HEE conders Employee Beause Groups to be a vial component that connects various members of the Hopkins workforce with each other and with the institution. Therefore, an inherent element of the mission of an Employee Resource Group is to promote the welfare of Johns Hopkins Medicine and to establish mutually beneficial relationships between YOUR 00B HEE, risk workforce, members of the Employee Resource Group, and the communities YOUR 00B HEE serves.

These disidelines are intended to provide general information for employees interested in establishing an Employee Resource Group and as a resource for any Employee Resource Groups that currently exist. Please note that this is a working, argunic document and is subject to change. If additional information is needed or you have subsequent questions, please contact the Office of Worknerce Diversity as follows:

Office of Workforce Diversity YOUR ADDRESS INFO HERE

#### ESTABLISHING AN EMPLOYEE RESOURCE GROUP

The success of a new Employee Resource Group most often depends on a small nucleus of dedicated and interested employees. It takes commitment from these individuals to ensure the group organizes itself is such a way to to guarantee continuity. Below are a few helpful criteria and suggestions for establishing your new Employee Resource Group and to assure consistency with Employee Resource Group organs nodestens:

Complete an Employee Resource Group Application.
 Establish a list of at least five (5) interested employees willing to volunteer to join you
 Employee Resource Group.
 J. Identify your targeted members.

3. Identify your targetee memoers.
 4. Prepare a mission statement for your Employee Resource Group as well as the goals of
the group.

6. Enhance the public image and presence of YOUR ORG HERE.
 7. Any programs sponsored by the Employee Resource Group must be financial
 reflorementation

ibers of th





#### Securing Sustainable Resources

- Establish a clear and realistic timeline for ERG activities
- Support leadership team with prioritizing time by streamlining meetings and ERG administration
- Consider allowing ERG volunteers to choose to support a subset of the events each year



## **ERG Event Planning Template**

- Event Best Practices
- Event Details
- Logistics
- Purpose
- Event cost/required resources

About this Temp	late	
group and allies. They bring peop to fellowship. Done right, events	rogramming and tend to have a tremendous impact on both im- le together and provide an opportunity for members of an ERG can be a driving force for accomplishing your ERG poets. To contant that you are consistent with event best practices:	
	event communications for all events for planning events and receiving approval from your DEI team responses	lighe event planning
	a streamlined and consistent process for planning your ERG is to support events so each has a defined purpose, a clear set ed cost.	
It is absolutely imperative that	you have the same planning process for every event that	
ERG should follow the same pro- different resources, which contrib Before you drive in, a few note • To use this template, ma and company needs.	ke a copy and update the highlighted words to fit your group	
ERG should follow the same pro- different resources, which contrib- different resources, which contrib- estimate the second second second second and company needs. In contraint sections, the library. To download the library. To download the	cass. Disjoined processes lead to different groups getting uites to overall inequality in the workplace.	
ERG should follow the same pro- different resources, which contrib- different resources, which contrib- estimate the second second second second and company needs. In contraint sections, the library. To download the library. To download the	Dess. Disported processes liked to differint groups getting uites to overrall inequality in the works loss of the second second second update the highlighted words to fit your group monitories will pick to other inequalities and worksheets, go to this complete set of ERO templates work worksheets, go to this	
ERG should follow the same pro- different resources, which contrib- different resources, which contrib- estimate the second second second second and company needs. In contraint sections, the library. To download the library. To download the	Dess. Disported processes liked to differint groups getting uites to overrall inequality in the works loss of the second second second update the highlighted words to fit your group monitories will pick to other inequalities and worksheets, go to this complete set of ERO templates work worksheets, go to this	
ERG should follow the same pro- different resources, which contrib- different resources, which contrib- estimate the second second second second and company needs. In contraint sections, the library. To download the library. To download the	Dess. Disported processes liked to differint groups getting uites to overrall inequality in the works loss of the second second second update the highlighted words to fit your group monitories will pick to other inequalities and worksheets, go to this complete set of ERO templates work worksheets, go to this	



Best Practices for ERG Challenges

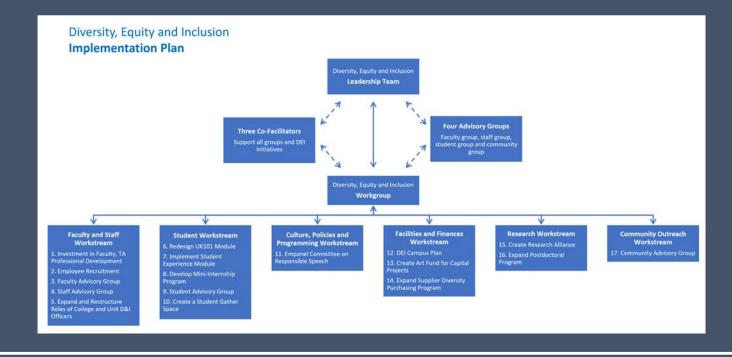
### **Employee Accessibility**

- Use social media campaigns to engage employees without a company email
- Communicate internally across multiple channels
- Leverage short-form video to reach employees with limited time
- Involve front-line employees in ERG planning of events and initiatives



### **DEI Implementation Plan Example**

#### • Example Governance Model and Workstreams



CADIA



### **Creating Governing Structures**

- Establish clear roles and responsibilities for ERG leaders and members
- Align the governing structure across ERGs
- Create training and certification requirements for roles with greater responsibility
- Choose a single point of contact for cross-ERG collaboration



### **ERG Charter Template**

- Mission Statement
- Membership Guidelines
- Leadership Structure
- Meeting Schedule
- Reporting Structure

Leadership Structure	
Note: depending on the maturity level of your ERG, you might have a bigger or smaller leadership team. You may also have multiple people sharing the same role (i.e. Event Co- Leads).	
"Roles that are "must-haves" in any ERG	
President*	
The President is the overall lead for the ERG. This person reports to company leadership about the status of our group. This person also tracks and reports on the progress of our group towards our overall goals.	Template
Executive Spansor*	
The Executive Sponsor advocates for our group to company leadership. This person serves as a mentor and advisor to our overall ERG and to our ERG leadership team.	
Treasurer	
This person is responsible for tracking group expenses and reporting expenses to our HR/DEI team on a quarterly basis.	four plans. The
Membership Lead	sala.
The Membership lead is responsible for recruiting employees to join and participate in the ERG. This person is also responsible for tracking and reporting on membership metrics.	
Events Lead	v leadership team
The Events Leads is responsible for planning events for our ERG. This person is responsible for planning events in accordance with our group pash, gathering feedback on those events, communicating argenses with the Treasurer, and reporting on the success of events to the President.	a requests for tom HR, etc.), and
Community Lead	
This perior is responsible for fostering community while our group. This periors will support the Event Least is planning scale vertex. Fundle crists shartons (fivhen they arise and generally act as a community manager for our ERG.	company all-hands to join the ERG, our prining events, and the company.
Got feedback on this template? Let us know! Email us at teamfulnets pr	
Chathe co	

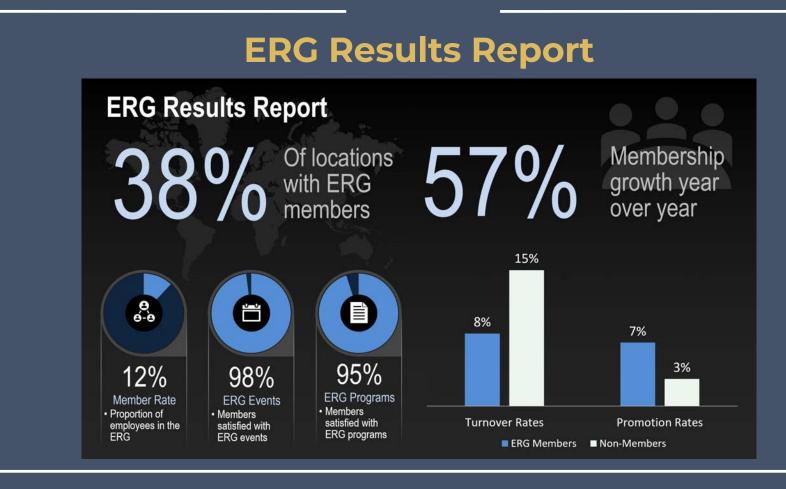




### **Defining and Measuring ERG Effectiveness**

- Establish a cadence for surveys of ERG members and the workforce at large
- Track participation in events and engagement in social posts where possible
- Compare employee outcomes and experiences for ERG members and non-members





Best Practices for ERG Challenges

#### Succession Planning & Managing Staff Changes/Turnover

- Be explicit about the terms for all ERG roles
- ERG leaders especially need the opportunity to transition out of the roles
- Actively recruit and develop within the ERG
- Create opportunities within the ERG for members seeking leadership and project management experience



## **ERG Lead Application Template**

- Instructions
- Welcome
- General Information Questions
- Interview Screening Questions
- Thank You

<ul> <li>and company needs.</li> <li>While there are some four either existing leadership of the exist of the exist</li></ul>	a copy and update the highlighted words to fit your group dational questions that you should ask, consider working with with your ERGs members to ask what they want in a lead, pplication around those insights.	
Got feedback on this template? Le	t us know! Email us at team@chezie.co.	
For a version of this application in	Google Forms that you can copy and edit, click this link.	
Section 1 - Welcome!		
	g en ERG lead. As a reminder, we're boking for leads who sive spaces for our employees. As a lead, you receive: e can leem more about you.	
Section 2 - Your Informat	ion	
Question	Response	
Name		
Email		
Job Title		
000 1104		
Which ERG are you applying for (single choice)	AAPI ERG Black ERG Lafinx ERG Proje ERG Women's ERG Vetran's ERG	
Which ERG are you applying	Black ERG     Latinx ERG     Pride ERG     Women's ERG	
Which ERG are you applying for (single choice)	Black ERG     Latinx ERG     Pride ERG     Women's ERG	niew taans will
Which ERG are you applying for (single choice) Are you currently a member of this ERG? Note: if the applicant is not a member currently, they should	Black ERG     Latinx ERG     Pride ERG     Women's ERG	New Stanto will



# Best Practices for ERG Challenges

### Fostering Meaningful ERG Participation and Engagement

- Work with internal communications teams to consistently promote ERGs
- Integrate ERG calendars with communications calendars
- Utilize all-employee meetings
- Focus on intersectionality, working collaboratively across ERGs and hosting joint events



## Allyship ERG Guide Template

- Overview and Purpose
- ERG Mission
- What Allyship looks like
- Ways to Support
- Inclusivity and Healthy Boundaries
- Distribution

#### The Allies Guide to Working With the XYZ ERG

The Allies Guide is Working with the XYZ ERG is a comprehensive resource for those who want to support and work with the Employee Resource Group (ERG). This guide provides a single-shap process for allies to understand the mission of the ERG and how to best support and collaborate effectively and about be reviewed and updated as necessary to all what once a year.

#### Start with an overview and purpose:

Add the ERG Mission:

How to Use: Begin the guide by explaining the reason for its creation. Mention that the guide is meant to be a resource for allies that provides an overview of the ERC's mission, what allyhish looks like to the ERC dear and concise ways to support the ERG, and emphasizes the importance of fostering inclusivity and healthy boundaries.

he ERG.

sivity and set oriment for all

and make it everyone is on cultural identity

How to Use: Add the ERG mission so that allies can understand the way behind the ERG.

Explain what Allyship looks like to the ERG: How to Use: By explaining what allyship looks like for the ERG, alles will have a clear pathway to how best to connect, support and advocate for the ERG.



### The ERG Sustainment Toolkit

#### Included ERG Toolkit Templates & Examples

- Allyship ERG Guide Template
- Black History Month Slack Message Series – Example
- DEI Implementation Plan – Example
- ERG Budget Planning Template
- ERG Results Report Template
- ERG Standard Operating Procedures

- ERG Application Form
- ERG Event Planning Template
- ERG Event Planning Template
- ERG Charter Template #1
- ERG Charter Template #2
- ERG Description Template
- ERG Mission Statement Template

- ERG New Member Welcome Email Template
- ERG Event Recap
   Template
- ERG Executive Sponsor Roles and Responsibilities Template
- ERG Activities Tracker Template
- Establishing an ERG Worksheet



### The ERG Sustainment Toolkit

### **Helpful Online Resources**

- <u>https://www.chezie.co/</u>
- <u>http://hr.mclean.co/</u>
- <u>http://ergscenter.com/</u>



"The most basic of all human needs is the need to understand and be understood. The best way to understand people is to listen to them." – Ralph G. Nichols

