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CENTER FOR AUTOMOTIVE DIVERSITY,
INCLUSION & ADVANCEMENT

THE ERG SUSTAINMENT TOOLKIT

Best Practices for Sustaining Employee Resource Groups

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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

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"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

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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

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Collecting our Experiences

Phase 2

Our Experience with the Challenges

- Having group meetings revealed a wealth of shared knowledge and experience
- We collected notes from these discussions as a basis for the project

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
  - 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.?
  - Who are we partnering with?
    - Recruiting conferences for example
- 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
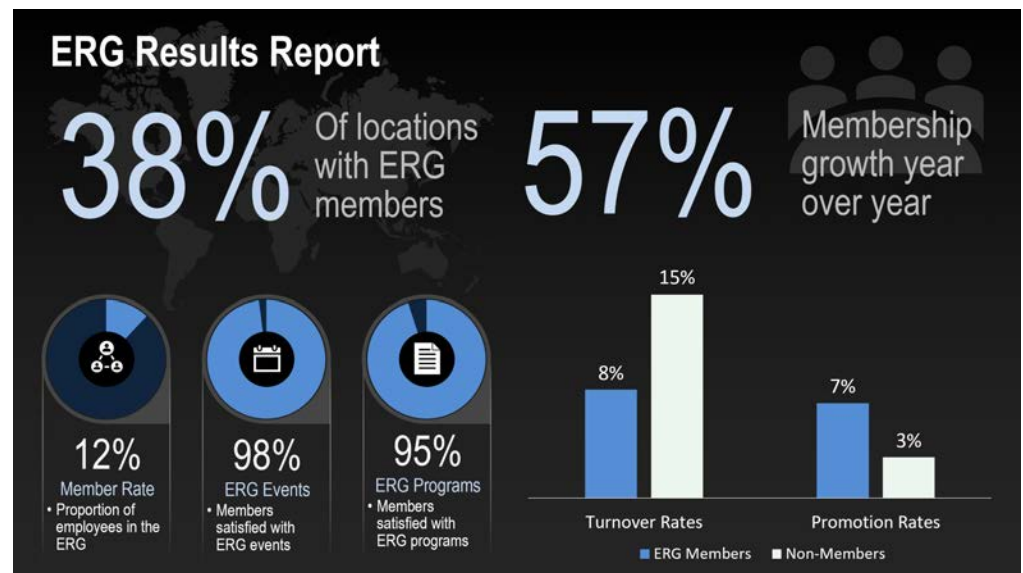
Creating a Valuable Resource
Phase 3

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

Best Practices for
ERG Challenges

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

Best Practices for
ERG Challenges

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
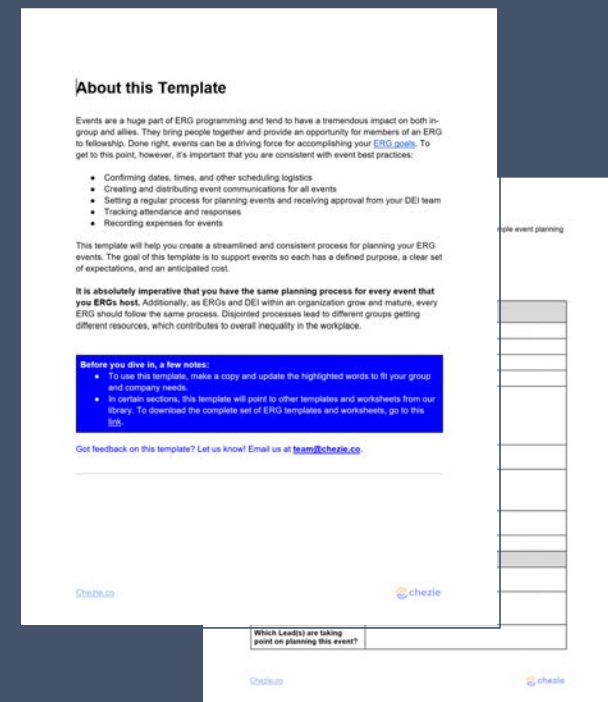
Best Practices for
ERG Challenges

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
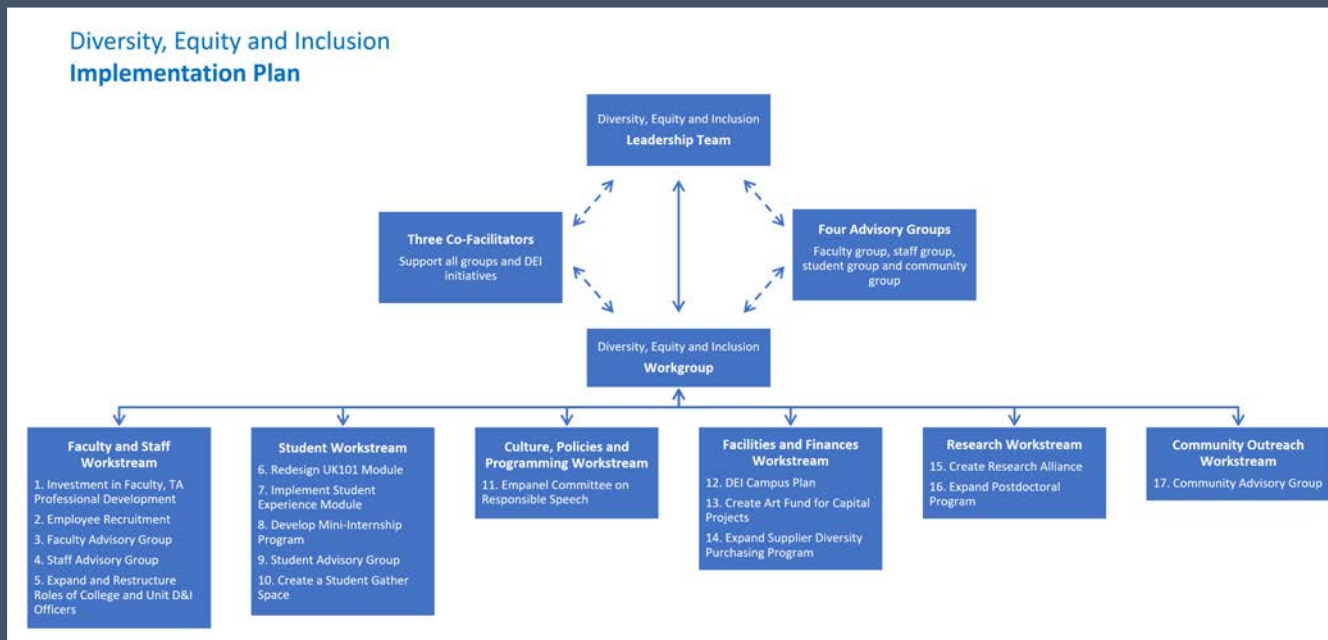
Best Practices for
ERG Challenges

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
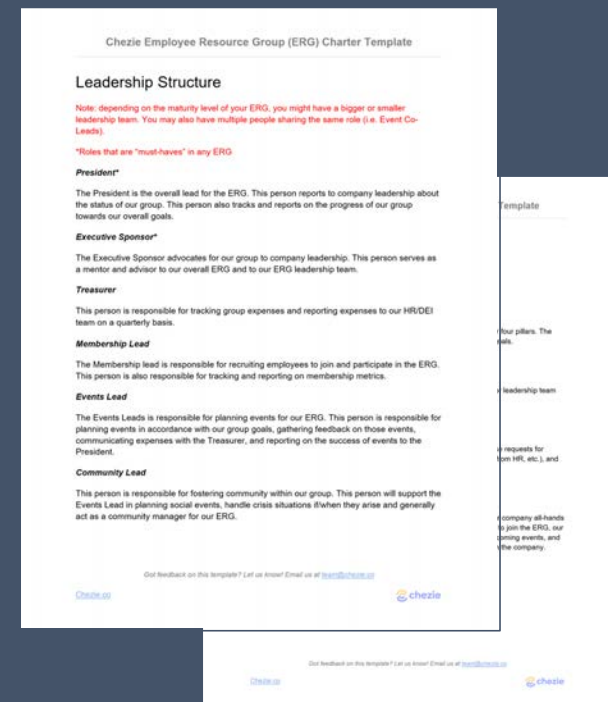
Best Practices for ERG Challenges

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**

ERG Results Report
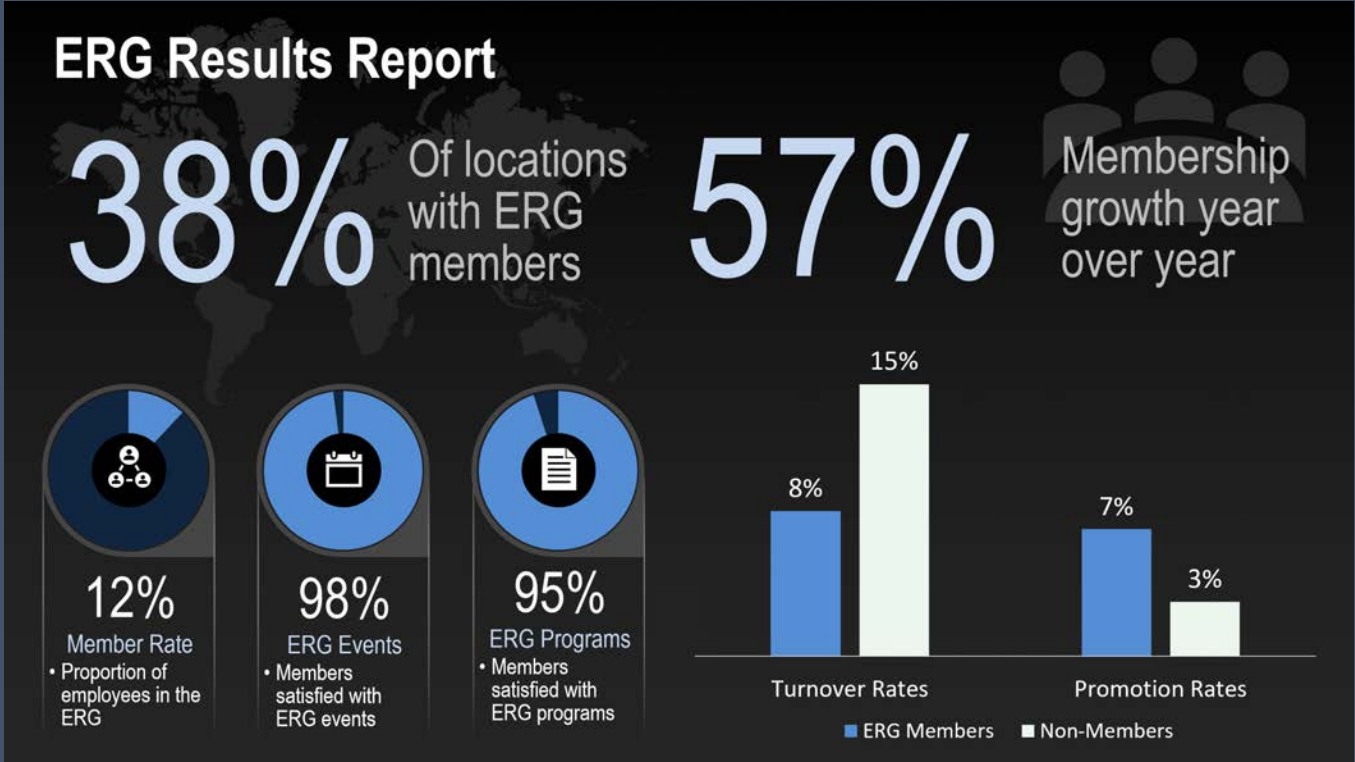
Best Practices for
ERG Challenges

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

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
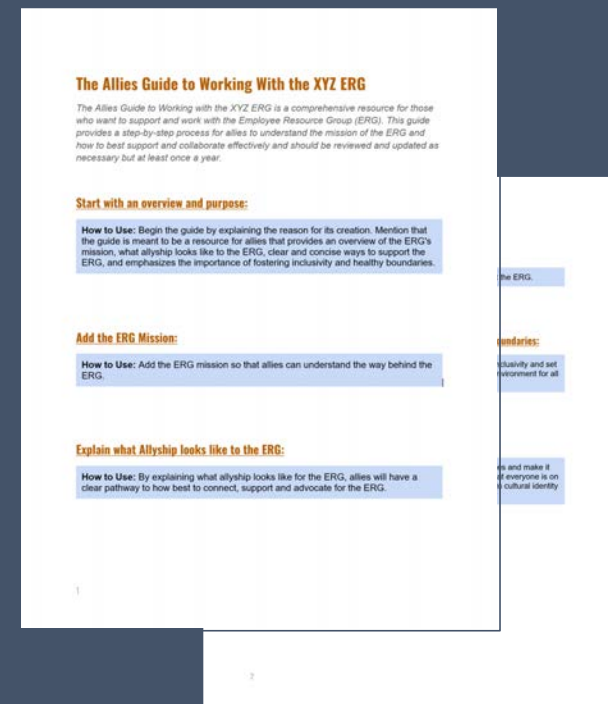
The ERG Sustainment Toolkit

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

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The ERG
Sustainment Toolkit

Helpful Online Resources

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

> *"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*

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