



ERG PLAYBOOK

HOW TO SETUP AND MAINTAIN
AN EFFECTIVE ERG?

2021



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WELCOME!

MESSAGE FROM DIVERSITY HUB

For many years Employee Resources Groups (ERGs, employee networks) have been inseparable element of the corporate landscape, supporting the processes of building culture of diversity and inclusion in business. They arise as result of grassroot initiatives of employees or are inspired and supported by companies which consciously invest in creating cultures of engagement. As such they have huge potential to support the company's strategic goals.

In Diversity Hub we see ERGs as real business development partner. That is why we want to lead them from bottom-up initiatives aimed to meet the needs of people involved, to professional structures that have real impact on business growth.

Our journey with ERGs started in autumn 2018, when we began our first inter-company meetings of

ERGs that were aimed at mutual learning and support. Several meetings, hours of talks and opinion sharing and also conducted study on the effectiveness and efficiency of ERG activities gave us good recognition of ERG's challenges and needs. Based on that we created [ERGs Center](#) in which we help to realize the full business potential of employee resource groups and where ERG leaders and everyone interested in starting ERG can find supportive community and helpful tools, one of which is this Playbook.

On behalf of Diversity Hub, would like to thank our supporters without whom ERG Center would not be possible. And wish the readers lot of valuable experiences within their networks and many impactful actions.

Anna Zaroda – Dąbrowska
CEO, Diversity Hub

MESSAGE FROM THE GERMAN EMBASSY IN WARSAW

Diversity in the workplace is actually something natural. We all have different backgrounds, experiences, struggle with different challenges in life. Only by acknowledging and respecting this can we create an effective team of people who cooperate and support each other.

As a diplomat moving from country to country, you experience firsthand how important the sensitivity for often subtle cultural differences is and how enriching and exciting diversity for an organization might be. It is well-known that employees who feel, they can express themselves freely and experience support from like-minded colleagues, develop stronger ties with their workplace. They become more creative and also their companies benefit from it.

Creating employee resource groups in organizations can help stimulate

this type of an environment and is a crucial contribution to fighting discrimination and celebrating diversity and inclusion. I am very pleased that as part of Germany's engagement for human rights globally we were able to contribute to enhancing this idea by supporting the development of the ERG Playbook.

Arndt Freytag von Loringhoven
German Ambassador to Poland



MESSAGE FROM THE AUTHORS

Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has.

Margaret Mead

Welcome to the ERGs Playbook by ERGs Center! We created this resource thinking about leaders who are about to set up their own network or are just at the beginning of their journey. We combined our collective experience – working in the area of Diversity and Inclusion in Europe and North America, starting and leading ERGs in global organizations – to help you be more effective.

We know that even a quick Google search will show you an abundance of resources about employee resource groups. The amount of information available can be overwhelming, and that is why we pared it down to the most important things. Starting with **the big picture** – so you would know how your piece fits into a larger context – we will guide you through everything you need to set you and your network up for success.

The action-oriented parts – **1. Starting an ERG in your organization & 2. All is set! What's Next?**

– were written by ERG leaders for their fellow ERG leaders. While there is no “one-size-fits-all” approach, as a first-time leader you don't know what you don't know. The Playbook will give you a great overview of what you need to consider. We encourage you to think it through and adapt and customize the advice to fit the context of your members and your organization.

If you are interested in learning more get in touch or check other initiatives in the ERGs Center. We help leaders like you be more effective, connected, and visible. See you around!

Anna Kostecka

ERGs Center Lead

Szymon Martyniak

Community Co-Lead at ERGs Center

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THE BIG PICTURE



HELLO!

I'm Anna Kostecka (she/her), and I am a Diversity, Equity, and Inclusion (DEI) strategist with +10 years of experience supporting organizations around the world on their DEI journey. If there is one thing, I learned in my work, it is that "it takes a village". Creating a workplace that works for everyone requires a deep exploration of how you do things in your organization and a collaborative effort of changing them. It needs to be led by leadership, and it is not a quick fix but, a journey without a destination where everyone has a responsibility and a role to play. Let's explore how Employee Resources Groups (ERG) fit into the larger organizational context of Diversity, Equity and Inclusion work.



WHAT ARE ERGS?

Employee Resource Groups (ERGs) are voluntary, employee-led groups that bring together employees who share an interest in a specific dimension of diversity. They can be large global entities with a several thousand members and a sizable budget, or a local initiative with only several members.

The first ERG is the Black Caucus at Xerox Corporation that was created over 50 years ago to address the issues of overt discrimination and advocate for to equal opportunity and pay. This highlights the core characteristic of these networks – they are created to support a group that has been historically disadvantaged and/or does not have fair and equal access to opportunities in the workplace and the marketplace.

Most ERGs are open to all employees and collaboration with allies – people who are not members of the identity group but act in solidarity with it – is a critical part of success. Some organizations are making a point of highlighting this in the

name of the networks. Out of the 15 ERGs in Netflix, 14 include "and Allies" in their name e.g., Women Employees and Allies, People with Disabilities and Their Allies. See more examples in the Figure 1.

The most popular ERGs support women, LGBTQ+ employees, racialized employees, or specific ethnic communities (Kaplan, Sabin, and Smaller-Swift, 2009ⁱ; Mercer, 2011ⁱⁱ). Other examples include networks based on age, ability status, parental status, religion, and thinking style. ERGs are well-established in the business world – 90% of Fortune 500 companies have themⁱⁱⁱ. The leader of 2020 DiversityInc's Top 50 companies for Employee Resource Groups^{iv} – AT&T's enterprise – has 37 networks with a total membership of over 145,000 employees^v.

ERGs are also known as affinity groups, employee networks, or business resource groups. These different names highlight their evolution and how ERGs serve both it's members and organization.

Employee Resource Groups

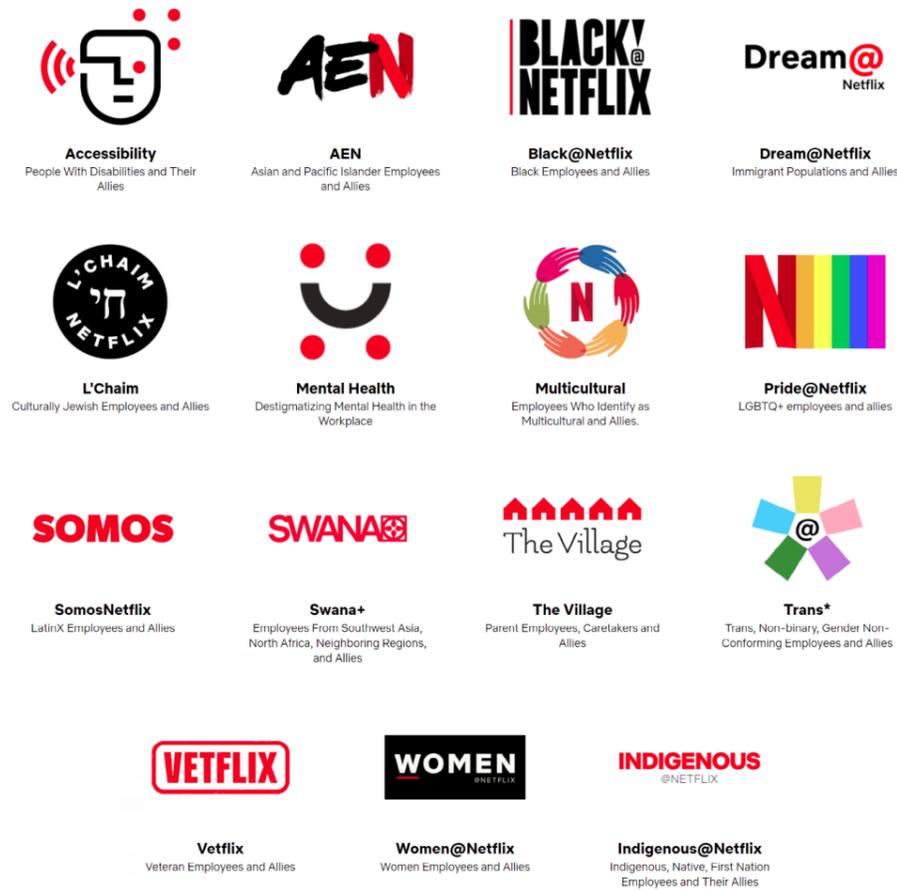


Figure 1 – Employee Resource Groups at Netflix. Retrieved at <https://jobs.netflix.com/inclusion>.

Not all groups that bring employees together are considered ERGs. The key issue is whether the group has been historically disadvantaged and/or faces additional barriers in the workplace and life.

Companies support ERGs as their work helps address some of these barriers making the workplace more inclusive, developing business opportunities, and building corporate social responsibility.

KEY CONCEPTS

Diversity: the variety of similarities and differences among people that impact their experience in the workplace. They are often called diversity dimensions, and include, but are not limited to: gender, sex, gender identity and expression, ethnicity, race, native or indigenous identity/origin, age, generation, disability, sexual orientation, culture, religion, belief system, marital status, parental, status, pregnancy, socio-economic status/caste, appearance, language and accent, mental health, education, geography, nationality, work style, work experience, job role and function, thinking style, and personality type.

Inclusion: a state of operating in which diversity is leveraged to create a fair, healthy, and high-performing organization. Inclusion ensures equitable access to resources and opportunities for all.

It also enables individuals and groups to feel safe, respected, and valued for who they are.

Equity: fairness and justice

Intersectionality: complex ways in which individuals hold many identities at the same time. The combination of these identities results in multiple systems of discrimination or oppression (for example a Black woman, a poor Indigenous person, or a gay person with a disability). The intersectional experience of one person or group is greater than the sum of the individual forms of discrimination or disadvantage.

Molefi, N., O'Mara, J., Richter, A., (2021). Global Diversity, Equity & Inclusion Benchmarks: Standards for Organizations Around the World.



THE BENEFITS OF ERGS

ERGs serve as a resource for its members, foster diversity and inclusion, and drive business results for the organization. Each network can have different objectives, play various roles, and bring different ben-

efits depending on the organizational and societal context, and what the members and the organization itself need. The key benefits are outlined below.

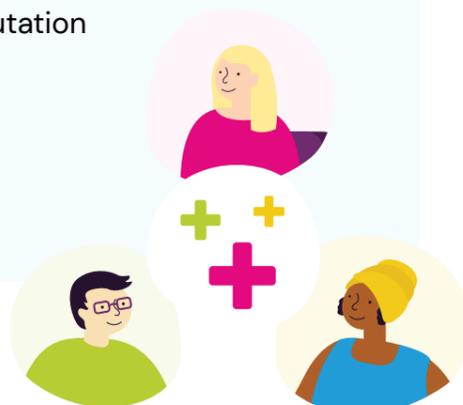
BENEFITS FOR MEMBERS

- Shared community
- Opportunity to make the workplace more inclusive (e.g. focus on recruitment and retention, change in organizational policies, education)
- Increased engagement
- Leadership development
- Skill-building
- Visibility
- Career advancement
- Networking



BENEFITS FOR THE ORGANIZATION

- Contribute to achieving Diversity, Equity, and Inclusion goals
- Provide strategic HR advice
- Recruitment and retention of untapped talent pool
- Leadership talent pipeline
- Increased employee engagement
- Business innovation and client intelligence
- Connections to the community
- Building corporate social responsibility
- Reputation



HOW DOES IT FIT INTO THE LARGER CONTEXT?

If set up correctly, ERGs are an important part of Diversity, Equity and Inclusion (DEI) work in the organization. That includes internal work related to the people employed but also external work related to the clients and communities in which the company operates.

Internally, ERGs are well positioned to contribute to:

- recruitment,
- advancement,
- skills development
- introducing more inclusive policies and procedures,
- boosting employee engagement,
- and fostering the feeling of belonging.

In practice, it means that ERGs help improve representation at different levels of the organization, organize mentoring and leadership development programs, or initiate policy change that benefits all employees. To name a few examples, introducing domestic partners benefits, advocated by LGBTQ+ networks, improves access many critical benefits including healthcare for all employees who are in partnerships but are not married; introducing flexible work schedule, advocated

by working parents' groups, helps employees with friends and families in different time zones stay more connected.

With regards to external work, employee networks can be leveraged in:

- service and product development
- building corporate social responsibility
- building brand and reputation.

For example, at PepsiCo employee networks have contributed to the development of several products. Adelante PepsiCo's Hispanic/Latino network has a long-standing history of helping bring products to market and impact sales. The group's goal is explicitly stated as "Adelante helps PepsiCo gain a competitive advantage by helping unleash the potential of PepsiCo's multicultural Hispanic community to drive consumer insights and develop top talent and accelerate growth opportunities".^{vi}

As you can see, DEI is a strategic part of the operations of the whole organization. That is why it needs to be properly structured and resourced. Depending on the size of the organization, it could range from a dedicated C-suite role with

a team, Executive DEI Council, and various other groups including ERGs to being only part of someone's portfolio. It can't be effective if it is done off the side of someone's desk.

It is important to note that while an ERG can play important role in achieving specific DEI goals, the ultimate accountability

A WORD OF CAUTION

ERGs are often started because, a specific group of employees is underrepresented in the leadership and the organization, do not have access to the same opportunities as others, or they might be lacking a feeling of safety and belonging in the workplace. The work arrangements themselves might be not enough to meet their needs in terms of the benefits, flexibility, protections, and career opportunities offered.

ERGs are meant to help fill these gaps, address the barriers, provide a community, and make the workplace more inclusive for all. Because ERGs are started by employees who already face additional barriers in the workplace, companies need to make sure that the way these networks are created and maintained does not fur-

always lies with senior leaders. For example, a Women ERG is not responsible for addressing the underrepresentation of women in leadership positions. It is still on the company to do so - it requires change in talent management practices including equal access to opportunities, and developing new skillsets for those supporting women and making promotion decisions.

ther inequities. The perfect example of the latter was clearly visible during the 2020 equity reckoning when many companies were leaning heavily on their Black employee groups without compensating them for the additional work or reassigning the workload^{vi}.

LinkedIn has recently made headlines when the company announced that they would pay employee networks leaders \$10,000 for each year served^{viii}. This trend of rethinking monetary rewards for the ERG leaders is a move in the right direction. Even without financial compensation companies have many ways to recognize the value and additional work ERG leaders bring. In supportive environment, network leaders can use their role to strategically advance their careers.

ANNOTATIONS

ⁱ Kaplan, M.M., Sabin, E., & Smaller-Swift, S. 2009. The Catalyst Guide to Employee Resource Groups. Volume 1: Introduction to ERGs.

ⁱⁱ Mercer. 2011. ERGs come of age: The evolution of employee resource groups.

ⁱⁱⁱ The Employer Assistance and Resource Network on Disability Inclusion (EARN). 2019. Toolkit for Establishing and Maintaining Successful Employee Resource Groups retrieved at https://production-ask-arn-org.s3.amazonaws.com/EARN_ERG_Toolkit_5a8ffe21e1.pdf

^{iv} Retrieved from <https://www.diversityinc.com/the-diversityinc-top-companies-for-employee-resource-groups-erg/>

^v Retrieved at https://about.att.com/pages/diversity/employee_groups

^{vi} PepsiCo DE&I Annual Report 2020. Retrieved from https://www.pepsico.com/docs/album/esg-topics-policies/pepsico-diversity-equity-inclusion-annual-report-2020.pdf?sfvrsn=a646b6_8

^{vii} Tiku, N. 2020. Tech companies are asking their black employee groups to fix Silicon Valley's race problem — often for free. Washington Post. Retrieved at <https://www.washingtonpost-com.cdn.ampproject.org/c/s/www.washingtonpost.com/technology/2020/06/26/black-ergs-tech/?outputType=amp>

^{viii} Morris, S. 2021. LinkedIn Joins the Bandwagon by Compensating ERG Leaders For Culture Impacts. Forbes. Retrieved at <https://www.forbes.com/sites/simonemorris/2021/06/17/linkedin-joins-the-bandwagon-by-compensating-erg-leaders-for-culture-impacts/?sh=5be266433653>

01

**STARTING
AN ERG
IN YOUR
ORGANIZATION**



Hi!

I'm Szymon Martyniak and I am Pride (LGBTQ+) Chair in my company. My diversity and inclusion journey started in 2015 when I set up an ERG in my organization. I have been leading the Pride ERG for 7 years. Along the way, I have learned a lot about employee networks and how companies can support all of their employees. My ERG involvement has given me new exciting career opportunities and enabled me to meet many interesting people. If you embark on this journey, you'll be able to enjoy many new chances for development as well.

I am excited to share my insights and guide your first steps in the world of ERGs!



MY STORY: WHY I STARTED AN ERG FOR LGBTQ+ COMMUNITY AND ALLIES?

When I join a new organization, I always ask myself many questions: What are the opportunities and challenges here? Are there any unwritten rules? Are there people like me in this company? You see, I always consider this last question because I belong to a marginalized group - LGBTQ+ community. I also wonder about: How authentic can I be at work? Can I come out without being judged? Is it worth it? I wonder if I should just do my work and not mention anything about my private life - my partner, my family, my child. If somebody asks me a question like, "What did you do during the weekend?", I could just try to answer it in a vague manner... Just to stay safe and sound.

This approach can only work in the short run and I didn't want to take it. Research shows that in the long run, this can lead to minority stress, burn-out syndrome, or simply unhappiness. Work is not only about assuming our responsibilities and using our skills and talents to do so. We also need to feel psychologically safe and that we belong. The workplace needs to be inclusive. I have always wondered what employers can do to create this kind of environment. When I realized that one of

the strategies is to have Employee Resource Groups (ERGs), I decided to start one myself!

The catalyst was actually a video on the internal corporate website about the importance of a diverse workforce. It explained how LGBTQ+ inclusion can be beneficial for the company. I learned that by creating an LGBTQ+ friendly workplace, companies could:

- reduce minority stress,
- improve the health of LGBTQ+ employees,
- increase job satisfaction,
- help create more positive relationships with co-workers and supervisors,
- do the right thing in line with corporate values and principles.

I was very intrigued by the idea and wanted to know more. While I haven't experienced any form of discrimination at work before, I wasn't sure how open I could be about my sexuality and family status. In Poland back in 2015, sexual orientation and gender identity were still a taboo in many situations. Actually, in 2021 this

is still the case in many circumstances. People are often expected to follow the “don’t ask, don’t tell” rule. This approach has always worried me... Why some people are allowed to talk about their partners and families, while others have to stay silent or feel stressed to do so as they need to come out every time they talk with their colleagues?

I reflected on my personal values and one of them was courage, which happened to be one of the corporate values of my

company too. I decided to approach my manager and asked him how to start an ERG for LGBTQ+ community and allies. I received all the information and contacts I needed to start... and so I did. Later on, I heard many stories like mine – while there is a global diversity and inclusion strategy written and approved in the headquarters, implementing it locally is not a given. I was lucky enough to have the support of the leaders and senior managers straight away. This is not always the case and you will have to gain it.

HOW TO START AN ERG?

Many employees resource groups are formed because, people from marginalized groups ask their employers to set up a network that would support their needs on a local level. The “think globally, act locally” approach works best when there are employees who care about diversity and inclusion and are supported by their leaders and senior managers. The popularity of ERGs and the many benefits they bring to the organization were described in the introduction. They are a secret weapon for every company which wants to thrive.

In my organization, the diversity and inclusion strategy and the business case for it (its justification) had already been approved. I could easily leverage them when presenting the need for an ERG for the LGBTQ+ community to the local management board and future sponsors. My endeavours were always met with interest and willingness to support them. However, if your organization does not have a clear business case you can use, you might need to prepare one. Let’s look at the 9 steps you can take when creating an employee network.



9 STEPS TO START AND ERG

1. Evaluate organizational needs and set goals.

Do your research and find numbers.

First of all, I asked myself a question: Why should ERGs exist in my company? Before gaining buy-in from leadership and creating a mission and vision of my ERG, it was necessary for me to examine why and where my organization needed ERGs.

Is there a group that is underrepresented in my company? Is there a noticeable lack of representation of women and/or LGBTQ+ employees at the leadership table? Have any of the underrepresented groups voiced complaints about the way the organization is run? If there are already ERGs in your organization, what are they doing, and why starting your group is essential?

Identify the need by taking a closer look at your company. It’s also helpful to check what other organizations similar to yours are

doing. There can be many ERGs focused on various dimensions of diversity, e.g.

- Ability for people with disabilities,
- Multicultural,
- Multigenerational,
- Pride & Allies,
- Women’s ERG,
- Veterans and Allies,

It’s important to have plenty of information so that you can offer data and facts when gaining support, asking for funding, seeking out leadership and sponsorship, and recruiting members.

Here are some additional questions to ask yourself while assessing business needs:

- Do you know which groups are over-represented or underrepresented in your organization?
- Is your company having trouble recruiting women, LGBTQ+ individuals, racialized employees?
- Are you looking to attract a specific talent pool that you are missing out on? For example, Black or Hispanic employees?
- Are there retention issues with millennial employees?



Remember that ERGs can support business goals in many ways including increasing employee retention or helping recruit high-quality talent. Figuring out which ERGs to develop should be based on the company's needs. Once you have determined this, then it is time for the business case, vision, mission, terms of reference, and goal setting.

2. Align ERG with Business Objectives.

When creating an ERG, you need to establish what you are hoping to accomplish with it. What are the goals of the group? You should be very specific with the group's goals and objectives and align them with the goals and needs of your organization. This is critical for securing buy-in at all levels of the organization.

Here are some examples of how ERGs can support an organization:

Recruitment – attending career fairs, sharing job openings with their networks, and referring top talent.

Enhancing leadership development – serving as a proving ground for emerging leaders from among an ERG's membership, or introducing a structured leadership development program for them,

hosting leadership workshops for employees across the organization, fostering mentorships.

Creating a culture of inclusivity – embedding inclusivity into the company culture by raising awareness internally and elevating the company's brand within the communities the ERGs represent.

All ERGs serve as brand ambassadors for a company, representing the company at recruiting events and on social media. By having diverse representation at their career fair booths, a company attracts more diverse candidates to learn about the company. And they've seen an increase in internal referrals, which in turn decreases staffing and recruiting fees.

ERGs can lead and participate in community activities, giving members a new forum to engage with co-workers while positively impacting their communities. This could include a range of volunteer activities or sponsoring specific charities or programs. This brings many bene-

fits for the organization including building brand awareness and reaching new potential customers.

ERGs can become a vital component of the employee experience—making an organization an employer of choice and connecting them to top talent and new markets.

When you identified a need in your organization that your ERG will help support, it is important to be able to explain it to business leaders.

3. Create business case, find executive sponsor and gain support from top-level management.

First of all, a strong business case for ERGs is needed.

What is a business case?

A business case provides a clear justification for undertaking a project (starting ERGs in this case), program or portfolio. It defines its scope, evaluates the benefit, the cost and risk of alternative options, and provides a rationale for the preferred solution.

It is concise and it includes an executive summary, detailed info about finances, and an overview of the project's structure.

A business case for ERGs should convince key stakeholders of the importance and viability of your project. Make sure to include these things to be effective:

An executive summary – is a concise overview of your project's definition and goals. Use this section to briefly explain the problem and how you'll solve it.

A problem statement – although you already addressed it in the executive summary, take some time to dive deeper into the problem. Share any relevant research that helps frame the problem as a story, and make sure you draw a strong connection to the company's goals or mission.

Analysis supported by research and data – to show that the project is necessary. This is also a good place to include information about the team members involved in the project.

A projection of financial needs – explain how much money you need and exactly how it will be used. This is one of the most important parts of the business case.

A strong recommendation – explain the project you've chosen to pursue and why you think this is the best solu-



tion. You should also address the risks of this recommendation.

A discussion of other possible options

– Offer multiple solutions to the problem. The key stakeholders will review your data and business case to help decide the best course of action.

Leadership buy-in is the key to success

– it should come from the CEO and/or another corporate leader who has a special interest in the mission of the ERGs. Although ERGs are often started by employees, it is important to identify an executive sponsor from the beginning. Their role is to champion your ERG, provide advice so you could align your network with organizational goals, and

build support for your activities. As a senior-level executive, an executive sponsor, is the key channel for communicating your mission, goals, and progress to other senior leaders. They can be a catalyst for growth of your network and a connection to sustained funding, business relevance, and impact.

An executive sponsor can be assigned by management or chosen by the employees in the ERGs. It is important that you agree on what is expected from someone in this role. Typical responsibilities include:

- Serving as a public advocate for the ERG.
- Influencing other company leaders to lend support to the group's goals.
- Mentoring ERG members.

HOW TO FIND AN EXECUTIVE SPONSOR?

Approach your potential executive sponsor armed with plenty of data and information about the mission and need for your ERG. You should have facts that will persuade them to support you. Be persuasive in your argument as to why the group should exist — and why they should be championing your efforts. Keep in mind that the executive sponsor does not need to be a member of the ERG. In

fact, an outside perspective can often be beneficial and could help you gain more support from other non-members.

By serving as an executive sponsor of an ERG, your company's top leaders gain an opportunity to engage directly with employees across the organization and realize what are the daily challenges and struggles of a particular group.



4. Create vision, mission, and goals for your ERGs.

You previously identified a need in your organization and got leadership support to address it. Now it's time to put into words how you intend to do it. Any time people come together in service of a common purpose, the group should create a vision and mission statement to serve as its guiding principle. Developing these documents requires time, but they are powerful and useful tools for every ERG leader. Remember to create them in co-operation with all the people who want and are part of the community.

What is a vision statement?



A vision statement is the anchor point of any strategic plan. It outlines what an employee resource group would like to ultimately achieve, and gives purpose to the existence of the ERG. A well-written vision statement is short, simple, specific to your business, and leaves nothing open to interpretation.

Here are two examples of organizational vision statements:

LinkedIn: Create economic opportunities for every member of the global workforce.

Disney: To entertain, inform and inspire people around the globe through the power of unparalleled storytelling, reflecting the iconic brands, creative minds and innovative technologies that make ours the world's premier entertainment company.

What is a mission?



Apart from the vision an ERG also needs a mission. A company's mission statement defines its culture, values, ethics, fundamental goals, and agenda. The statement reveals what the company does, how it does it, and why it does it. An ERG mission statement should explain the group's purpose and align with the company's business objectives — don't limit your group to being only great networking platforms. Additionally, you could consider how your ERG can look beyond the company to support your local community. For example, you might want to sponsor activities for marginalized groups in your area.

An ERG could have a following mission statement: "To provide an open forum where employees with a shared interest aspire, develop and collaborate to reach their highest potential, represent the company in communities and serve as a key resource to the company for specific insights".

Once the vision and mission statement are clearly defined, the group **can formulate goals**. The goals could be:

- Develop future leaders.
- Increase employee engagement.
- Expand market reach and recruiting network.
- Create opportunities for leaders to build cultural competence.

While the mission statement endures over time, ERG goals require annual review to ensure they remain aligned with the needs of their members, company policies, and business objectives.

Here is an example of the mission and goals of the LBGQT Employee Resource Group at MIT:

“The mission of the LBGQT Employee Resource Group is to promote an inclusive community for lesbian, bisexual, gay, transgender and queer employees. The LBGQT ERG will support MIT’s efforts to diversify staff and faculty, and will work to recruit and retain LBGQT-identified employees. The LBGQT ERG will serve as a visible, accessible resource for LBGQT-identified employees and their allies, and will provide LBGQT-focused networking, educational and social opportunities for the MIT com-

munity. The LBGQT ERG is open to all MIT faculty and staff.

Goals:

- *Affirming LBGQT Identity*
- *Building LBGQT Community*
- *Cultivating LBGQT Equity”*

5. Establish guidelines and a structure for your ERGs.

Guided by its vision, mission, and goals, each ERG should develop guidelines that define its structure and operations, including:

- What is the ERG structure?
- How finances and funding are managed?
- How do meetings function?
- How leaders are selected?

These are described in **ToR (Terms of Reference)**. ToR is a formal document that describes Mission, Vision, Objectives, Membership, Representatives, the timing of meetings, ToR amendment procedure, dissolution, etc. They provide a documented basis for making future decisions and for confirming or developing a common understanding of the scope of ERG activity among stakeholders.

I want to talk more about defining **the ERG Leadership Roles**. Like any orga-

nization, an ERG needs a strong, capable leader(s) to drive growth and engage members as active participants in its activities. It should be someone who is passionate about objectives and goals of the ERG and is able to take charge.

Along with a leader, you should also establish a leadership committee, which might include other officers, including allies. Officers might be responsible for different tasks within the ERG, especially as you’re getting it off the ground. For example, you can assign a public relations officer, communications officer, and membership officer.

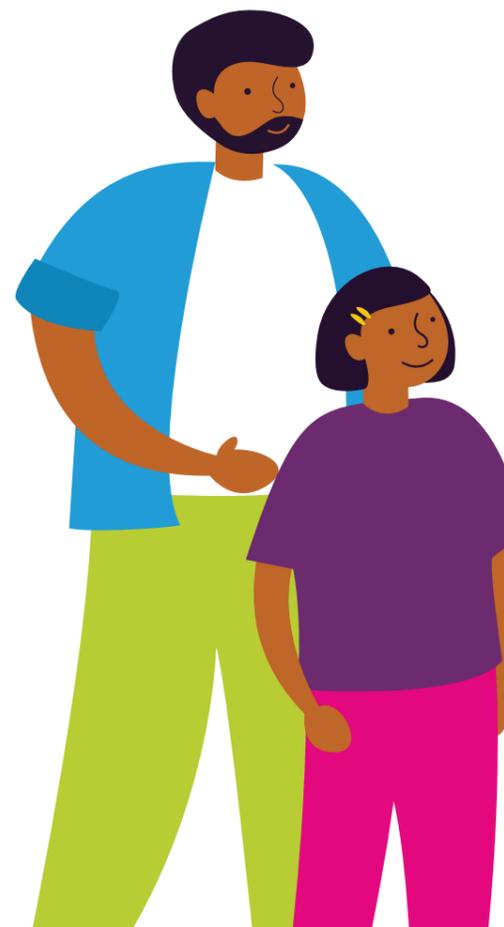
The best way to ensure your business networks are led by top performers is to highlight the benefits of taking a leadership role in an ERG. That includes:

- Exposure and access to executive sponsors and company leaders.
- Opportunities to learn and hone leadership skills, to apply in their current role, or better position themselves for advancement.
- Influence over the ERG’s direction and activities to support members and business objectives.

As organizations have come to recognize the importance of strong leadership to ERG success, many organizations have begun appointing leaders based on their capabilities and other criteria.

OUR TIP!

Plan for the future: When you establish initial leadership, have a plan of succession in mind. Consider other employees who might have the skills or be capable of building skills to elevate to leadership roles. Providing inspiration from current leadership and others through speaking events and mentorship programs can help you build skills in and identify potential future leaders.



6. Recruit your members.

You can start recruiting colleagues willing to take on a leadership role, such as committing to a monthly meeting or making time to plan and execute events. Also, start recruiting other like-minded people who are passionate about supporting your ERGs but can't commit to running the group. It's just as important to have members who are willing to participate and spread the word as it is to have leaders and planners.

It's okay to start out small at first. You don't need significant numbers of members to start. It may be quite small at the beginning, but if it's filling a need for you and your company, then that's fine. You can grow with time, recruit new members, update your goals.

It is also beneficial to have **allies of your ERGs**. They are individuals that do not necessarily share the group's characteristics, but are passionate about the group, want to learn more, and want to show their support. The underlying principle of ERGs is the one of inclusion and bringing employees together. So, they're perfectly positioned to build a culture of allyship among employees and to foster collaboration across the organization. The best

ERGs welcome employees from all backgrounds, and they cultivate cross-cultural relationships within and outside the organization. Also, some employees are members of multiple ERGs, signaling both intersectionality and a broad commitment to diversity and inclusion. The most effective ERG programs encourage cross-collaboration between and among affinity groups to take advantage of synergies, encourage the transfer of knowledge, and fuel business objectives.

7. Promote the group and maintain support.

Drive participation from the top down.

To help spread the word about your ERGs, you must promote and keep promoting them. Start by hosting an inaugural meeting for all ERGs or events to kick it off and make your organization's employees aware of it. The ERG must also foster relationships with key individuals and groups externally whose knowledge helps grow and support business growth outcomes. Appoint somebody in the ERG who will be responsible for public relations and communication. This is a great opportunity for this person to develop skills and get exposure and recognition in your company.

Update employees frequently, even if they are not members, to alert them of

the group's activities, goings-on, and mission. You might produce collateral such as flyers, posters, and brochures (although online options are also a good idea). Spread the word on your organization's social media channels and, create your own social media accounts to promote the ERG (collaborate with your PR and communication colleagues), and discuss ideas with HR or other committees at the company.

For the ERG to succeed, there must be ongoing support from top management and continued member engagement. To ensure the effectiveness of the group, continue in-house networking, such as creating workshops on topics related to your ERG and company newsletters.

Financial support is essential for keeping the ERG running. Your executive sponsor will champion your efforts to gain funding, but you and your group need to be fundraising sometimes as well. You will likely be allocated a budget by your organization, but you will need to make the officers responsible for allocating funds aware of why the funds are necessary and what projects and activities they will support.

8. Measure Success (KPI).

Track and Measure the Effectiveness of ERGs.

After you have successfully implemented an ERG into your organization, the last piece of the puzzle is measurement. Like any other company initiative, measurement is essential to effectively managing



individual ERGs and the ERG program as a whole. Ideally, your organization will capture baseline data before launching ERGs so you can compare before and after results and see how the program influences talent metrics such as:

- Recruiting event representation
- Retention rates
- Employee engagement levels
- Hiring rates for specific groups of candidates
- Employee promotion rates

To measure success, the group must establish benchmarks and key performance indicators (KPIs, e.g. timelines, goals). This will help leaders determine if the group has done what it set out to do. Success criteria should support the mission of the company, be easily understood by all members and be measurable. Some internal criteria for ERGs may include:

- X ERG members participate in a dedicated leadership development program
- X educational events launched for the whole organization
- X of employees who developed new skills
- X editions of the newsletter published
- X new members recruited

Each of your ERGs should identify key metrics to track and report on trends in member involvement, including:

- Group membership.
- Event attendance.
- Participation in ERG programs (mentoring, coaching, community service, etc.)
- Budget performance.

Moreover, your leadership or executive diversity council will want to track the effectiveness of ERGs against the company objectives. With the support of top-level management and careful planning, Employee Resource Groups can positively impact your business and create real change in your workplace for all employees.

9. Collaborate - partner with other ERGs and local NGOs.

There are likely other ERGs within your company. Rather than viewing them as competition for resources and funding, collaborate and work together. Often, you will be championing similar values and missions, so think about how you can support each other in your effort to improve diversity and other aspects of your company. You might, for instance, co-sponsor events and develop business plans together.

Companies support their Employee Resource Groups, but what really leads these groups to success is the engagement and active participation in activities of members. In other words, for employees who want their companies to have effective Employee Resource Groups, the one thing they can do is participate and be active.

ERGs should also continue to reflect on their mission, how they are supporting it, and what they can do to improve the group. Make sure you are educating your members and other employees about the goals of the ERG and offering sugges-

tions and training for creating an inclusive workplace for the entire organization.

SUMMARY

These are the steps which will help you start your ERG(s). As you can see, at first the process can seem overwhelming and requiring a lot of time and dedication but, as I mentioned it is also ok to start small. The more support and resources you have the more you can do, but there is always something that can be done and ERG(s) can be started by anyone at any-time there's at least a bit of interest, skill and willingness.



WHAT DO PEOPLE SAY ABOUT ERGS?

“ERGs have long been a safe space in which underrepresented groups of diverse employees could find support and networking, but some deliver additional business value more effectively than others. Enter the Executive Sponsor – a senior leader charged with ensuring the group has the organizational capital to make their existence and activities impactful. Engaging Executive Sponsors in an active leadership role vis-à-vis ERGs enables them to be catalysts for specific actions that nurture and develop the ERG, stakeholders and the organization itself. Executive Sponsors are the hinges connecting ERGs with the companies that founded and hope to benefit from them.

Given the rate and pace of change, the next decade in diversity will see ERGs evolve into smarter teams of dedicated leaders whose eyes will be on the return on engagement. These groups and their leaders will play a key role in ensuring companies pivot quickly and effectively to capitalize on global competitive markets and manage the enduring “war on talent.”

Jennifer Brown, founder & CEO Jennifer Brown Consulting





**ALL IS SET!
WHAT IS
NEXT?**

Hi!

I am Monika Lis and I'm the Head of the Working Parents Club in State Street Bank Poland. I have the honor and pleasure to lead this group for the last 7 years (with a break for a maternity leave).

I'm passionate about supporting parents (especially young mothers) in combining professional development with the role of a parent. It gives me a great deal of personal satisfaction and many opportunities to practice business skills, such as having challenging conversations or, being a charismatic leader for a group of people who are not my direct subordinates. I would like to share my experience of how to make an ERG work effectively. **So, let's start!**



INTRODUCTION

You have achieved your first success! Together with your colleagues you have launched a new ERG. Maybe it's even the first employee network in your organization. **Congratulations!**

When the dust of an ERG setup has settled, the new serious work begins. All ERG activity will be a process. It will include engagement from you and equally from the members of your group. You should al-

ways treat this process seriously and do your best to engage everybody who can support your work. Searching for allies and those who have a different perspective than your own, will help you to make your group more inclusive, worth joining, and even a role model for other networks. Leaders of well organised and effective ERGs need to ask themselves many questions. We can divide them into the following 3 groups.

1

EFFECTIVE PLAN OF ACTIVITIES

- How to plan activities? What kind of activities can we organise or co-organise?
- How to manage the budget? Is it possible to perform without a budget available?
- How to organise communication about the ERG's events?
- How to measure the effectiveness and set Key Performance Indicators (KPIs)?

2

RELATIONSHIPS

- How to be a charismatic leader who knows how to motivate members of the ERS?
- Why is it so important to be in constant touch with senior management and middle management?
- What can ERG gain from a good relationship with the HR team?
- What role does a sponsor play and how to best manage this relationship?

3

GLOBALLY OR LOCALLY VS. INTERNALLY OR EXTERNALLY

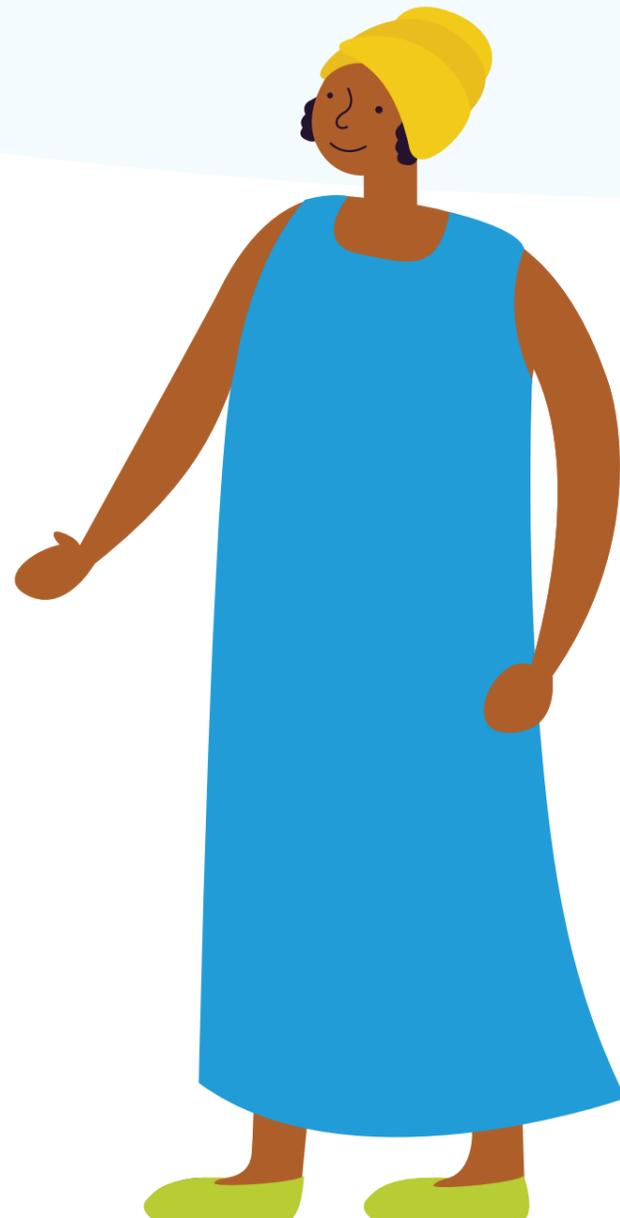
- Does the ERG plan to act only internally or have an appetite for supporting community initiatives? Can ERG engage in CSR or Employer branding activities?
- Does your organisation have subsidiaries across the globe? May the ERG play a global role in the organisation?

In the following pages, we will focus on answering these questions and provide you with the best practices shared by experienced ERGs leaders. Good luck!

OUR TIP!

Do not try to imitate or duplicate. Get inspired but look for your unique way. Uniqueness and authenticity are what attracts people and keeps them for a long time.

Each group is definitely different as it is created by various people and it is their shared vision that determines the framework and the way of operation.



SECTION 1: "E" LIKE EFFECTIVE PLAN OF ACTIVITIES

Planning gives you greater awareness of your own advantages, abilities, opportunities and resources. It also shows disadvantages, weaknesses and limitations. It helps you follow the chosen path and is an investment that really pays off when well performed.

Before drawing up an action plan, I always like to have a good overview of the situation: What strengths does my team bring? What are our weaknesses? What are opportunities not to miss? What are the potential threats to be aware of? Does it sound familiar? Yes, it's just a SWOT analysis (Strengths, Weaknesses, Opportunities and Threats). Knowing people who joined my ERG and understanding the results of SWOT analysis

helps me prepare the plan of activities for myself and the group. It helps me (in the future) assign projects to the members with the right competencies, take advantage of opportunities, and create a contingency plan in case the threats we identify occur.

With that in mind, the time has come for a well-prepared work plan for your ERG. It can be a plan of activities for one year or shorter. Creating a plan will take you more than one hour or a day, and you will need to change it during implementation, but it will give you a clear overview of all actions that need to happen, resources and tools you will need. You can check out the ERGs Center website for helpful tools.



assume that you have already determined the goal of your ERG and what you want to achieve. If not, go back to the previous part of the Playbook to make sure you are clear on that. Knowing the answer to the question WHY, let's move on to the question **"WHAT"** can be done? What kind of activities can ERG perform?

On one hand the sky's the limit", but then it really depends on what you want to achieve, resources available, and the context you operate in. The list of common activities includes:

- Face-to-face meetings of your group to connect
- Workshops (both online and offline)
- Discussion panels (also with external guests)
- Internal organisational policies and practises review
- Advising HR on specific issues e.g., benefits offered by the organization
- Recruitment support
- Development of leadership programs including mentoring
- Regular meetings for circle of support
- Newsletters that increase the awareness of employees (some facts, statistics, "topic of the month")
- Service and product development
- CSR activities including cooperation with non-profit organizations

Does this sound like wish-list? Perhaps. It all depends on you and members of your group. Some activities may be performed in cooperation with other employee networks. Striving for inclusiveness is what unites all ERGs. Since there are many dimensions of diversity and each person

holds different identities that combine to shape their experience and needs, there are many opportunities for ERGs to come together and collaborate. Examples of events include:

- Discussion panel "Challenges faced by LGBTQ+ parents" - organized by Working Parents and LGBTQ+ ERG
- Webinar about minority stress and emotional tax organized by ERGs for racialized employees and employees with disabilities or an ERG destigmatizing mental health

Now we may have the list of WHAT the ERG wants to organise or co-organise. The next question should be, **"WHO"** will actually do it.

One of the main pitfalls for an ERG Leader is the "I'll get it done" approach. In the very short term or in crisis situation, this makes sense. In the longer time frame, this is the best way to burnout. You are also running risk that the direction you took will not resonate with your members and, won't get support from the organization. As indicated by the name, ERG is GROUP of people, so **take advantage of the benefits they all bring to the table**. Everybody is different so, to engage them you might need to offer various forms of support.

One of the practices would be to assign Project Lead for each of the planned ERG activities and project team (if needed). The **"owner's mindset"** may help to maintain the engagement - which is one of the most crucial ingredients to running an effective ERG. You might also have supporting team, which could be made of the less experienced members who share responsibility for specific tasks.

Another approach would be to allocate roles based on the expertise or areas your members want to develop. For example, one member could always take care of the communication tasks, while another could be responsible for managing the enrollment tools or maintaining the SharePoint site of your ERG.

The comprehensive question **"HOW"** could be divided into four aspects - budget, daily work, communication, and measurement.

How about the "BUDGET"?

Budget Request

There are different methods of ERG's budget assignment. Probably, in the case of the first ERG in the organization, the budget will be allocated based on what you requested for your intuitive, and it



will be settled after you executed it. Your request is probably based on your estimates of what it would cost to deliver your initiative. An important element of budget requests is taking into account “real” amounts needed to implement individual projects verified on the market basis. Before building an application for budget, it is worth making inquiries to vendors considered to provide service or product.

The second option would be when your organization provided you with the budget for your activities in advance. All you need here is to manage this in proper way. What does it mean? Perhaps, the budget was given to your ERG based on the

criteria mentioned by the sponsor and should be spent accordingly. The criteria may include:

- maximum amount of money to be spent per event/activity
- amount of money to be spend per number of participants
- consistency of the direction of ERG activities with the overall policy of the organization
- custody of the budget will be run in dedicated tools

In both cases, the ability to negotiate the amount of the budget is an indispensable element of ERG leader skillset. Each organization may have an extreme budget; therefore, it is difficult to determine the optimal one. These can be amounts from several thousand to tens of thousands, or as many as hundreds of thousands (depending on the currency). In the case of budget being granted in foreign curren-

cy in relation to the currency in which the payments will be made – it is worth determining who bears the currency risk and possibly securing certain amount to cover it.

Budget management

Budget tracker is very helpful tool to be aware of current spending, amount still to be spent or underestimates/overestimates of the budget request.

Remember, you will have to settle accounts for the entrusted budget annually or semi-annually. It can be challenging in the case when you have underestimated (more money spent on activity), but also when overestimated. Even if the second scenario sounds positive, it may cause difficulties the next time you negotiate. You could hear the argument of not using funds that could be used by another ERG or for different purpose (budget lost). It is worth measuring the ratio of the budget used in relation to the entrusted one by regularly monitoring the situation.

Is it possible to work without budget?

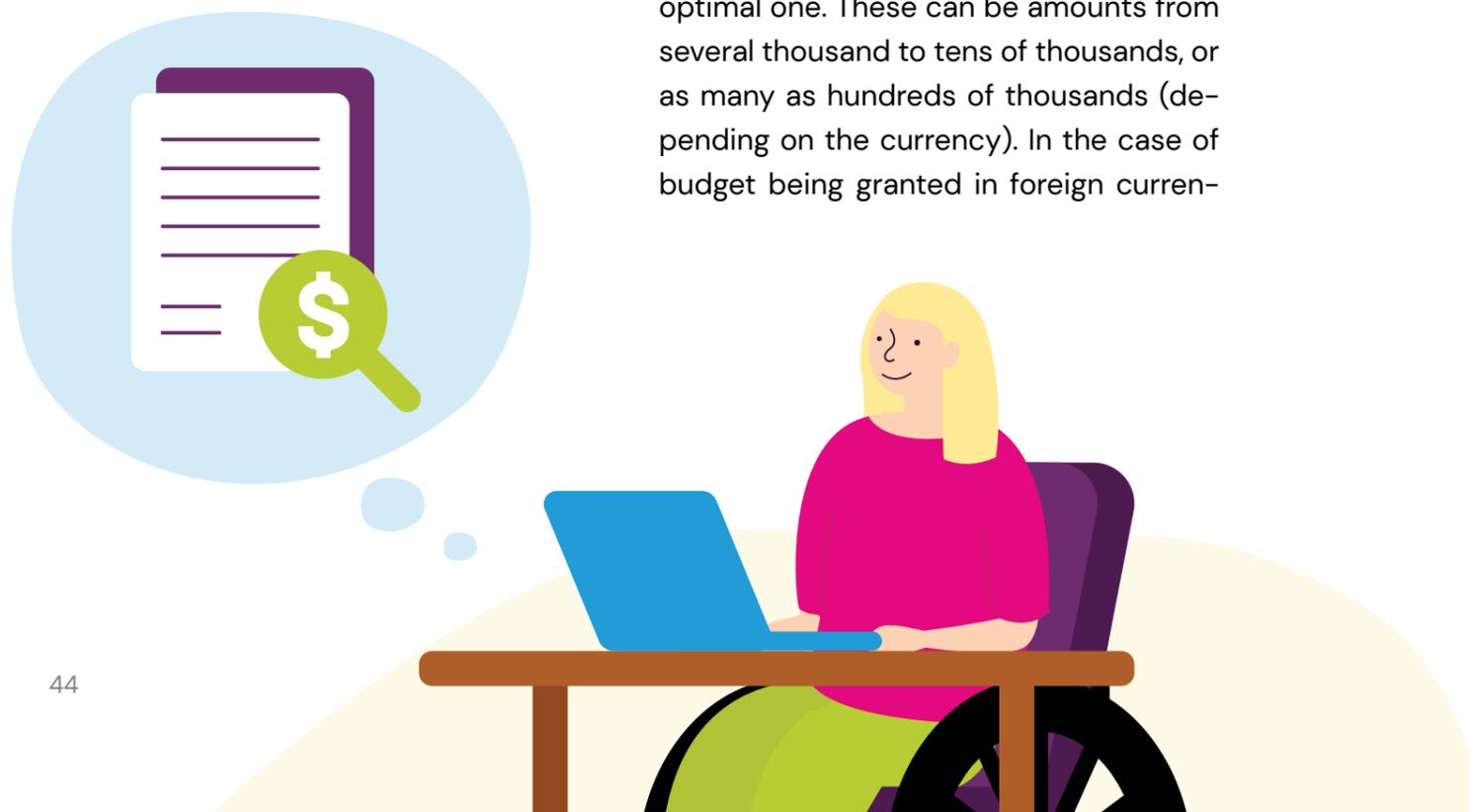
Yes! It is possible but you will need to rely on the time, experience, creativity and competencies of your members and

employees in your company. **Here are three tips:**

Some activities performed by ERGs do not need budget. Your group could review organisational policies and practises from your particular lens, organize circle of support, or cooperate with non-profit-organization that might have funding for educational activities, and provide them for you free of charge.

You could also leverage other internal resources. Have you heard about the “call for volunteers” initiative? There are many people in your organisation who could run discussion panel or organize workshop. They might have relevant experience or competencies they developed in their roles or outside of work due to their private interests. You might be surprised but it is often possible to find people who could teach your members about topics like nonviolent communication, allyship, or professional/personal development. You could also leverage their networks and organize an event with guest speaker invited by the member/employee, who volunteers in non-profit organization.

You could use the budget of other ERGs in your company (locally or globally). We mentioned in the previous part that



the cooperation with other ERGs inside the organisation is important. This could also mean sharing resources including budget while running common project. This is quite common for newly created ERGs that are still waiting for their budget to be allocated.

How about daily work? How to effectively organize ERG meetings?

Maintaining regular contact and supporting the involvement of ERG members requires work. It is important to establish the rules of your meetings – their frequency, formula, or how new members would join.

The frequency of meetings will depend on the stage of ERG development. Certainly, the initial phases of creating an ERG or setting up the annual plan, will require more meetings, but after that the frequency can be modified. It is important to make the effort to find the most convenient date for meetings. For example, avoid the beginning and end of the week and the end of the month as they can be challenging due to organizational processes and people taking holidays. As

an ERG leader, you may play the role of facilitator during meetings and help the group find solutions to reach the goals.

try to stay in contact all the time with all members between meetings. It is good practice to send the meeting notes after each meeting to update those who were absent with all required information. also use tools available in my organisation for communication. It can be MS Teams, Jabber, Basecamp, or Slack. These tools allow

one to create single point of contact and provide one place to share all materials with the group. Additionally, MS Teams gives you the possibility to manage the project by using Project Tracker.

In today's reality of the COVID-19 pandemic, organizations have moved away from "face to face" events to online ones (hope only for some time). As in regular virtual work, all principles of online collaboration apply. It is worth actively



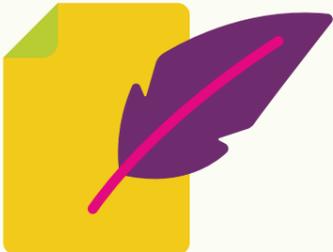
taking care of building virtual team and encouraging your group to share their experiences and ideas for effective virtual cooperation.

Have some fun as well! Virtual coffees or common team building activities – when again possible – like lunches or meetings outside of work, will help make your ERG more engaging. You can also organize an event only for the ERG members e.g., creating handicrafts for charity auctions. This will allow members to strengthen relationships with one another and learn new things about their colleagues.

How to organise the communication about the ERG's events?

Even large projects with significant budget could backfire if the communication with the people they affect is inadequate or insufficient. As your ERG will mainly work inside your organization, your focus will be communicating with an internal audience. Let's look at how to share information about your events and other activities.

Depending on what already exists in your organisation, there are different sets of communication channels you can use. The main ones include:



Internal blog



Intranet (collaborate page)



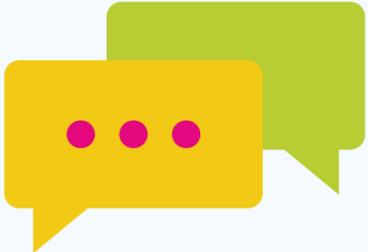
Internal newsletters – you can leverage a companywide newsletter or create your own that will be sent just to those interested in the work of your ERG. This is the primary tool to use to announce all upcoming events and activities.



Emails sent to an alias (mailing list) – alias will be a great way of tracking all people interested in the activity of a particular ERG. This will also be measurable information on the number of people who received the dedicated information.



Corporate social media (internal e.g., Microsoft Yammer and external e.g., LinkedIn)



Team collaboration tools (e.g., MS Teams, Slack etc.) – these tools allow you to create groups where you can share information with all members. You can announce events and activities, create a space to ask questions, and get feedback.

You have a lot of options but be careful about them. Using too many channels at the same time may be counterproductive. It may frustrate your colleagues if they happen to get messages about the same thing displayed on their screens through multiple channels. It is better to choose a maximum of 3-4 channels.

OUR TIP!

While your focus at the beginning is internal communication, consider using the company's social media to highlight initiatives you are especially proud of to an external audience. It will help make the work of your ERG more visible.



How to measure your effectiveness?

In the previous section, we explained what KPIs (Key Performance Indicators) are and how you need them to measure the success of your activities. KPIs are one of the simpler tools to manage almost every area of organizational performance. Depending on the type of activity, you can measure its effectiveness by selecting 3-5 KPIs that are the most relevant. For example, to show the effectiveness of your educational events you could track:

- number of people who took part in events organized by the ERG
- average rating of feedback from event participants
- total number of volunteer hours from ERG members

Once established and tracked, it is important and often required to regularly report your KPI results to your sponsor and senior leadership. Don't skip this step as it will be very helpful in negotiating your budget allocation or expanding the scope of your activities!

You can check out ERGs Center website for tools helping you manage your activities including communicating about them.

SECTION 2: "R" LIKE RELATIONSHIPS

An effective ERG, as part of the organization in which it operates, needs goals, plans, structures, communication channels, and KPIs that are monitored, but above all, it needs relations with people working in the company. The ability to build and maintain good relationships is a key competence of an ERG leader. In this section of the Playbook, we will focus on relationships with key stakeholder groups in your organization:

- ERG's members
- senior management,
- middle management,
- HR department
- D&I team
- Executive sponsors
- other ERGs in your organisation

I can't highlight this enough - an ERG is truly based on relationships. There are of different kinds, starting from formal ones with the senior leadership, to informal ones between you and members of your ERG or between the members themselves. It's these relationships that helped me in critical situations when time or resources were limited. Let's take a look at what to pay attention to and what

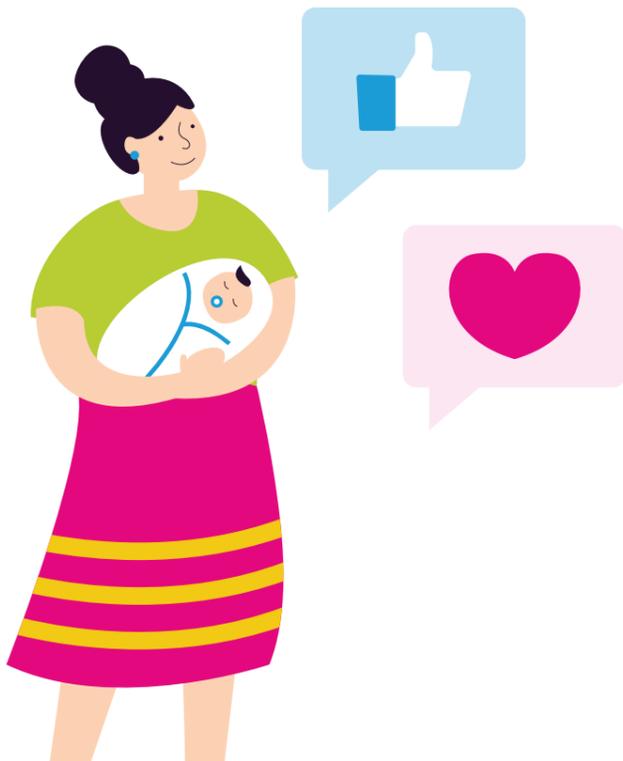
language to use when talking to different groups of stakeholders.

ERG's Members. How to be a charismatic leader who knows how to motivate their people?

The power of an ERG is the engagement of the people in it. Since ERGs are often a result of a bottom-up initiative, there is an assumption that the engagement of leaders and members will be constant and unchanged. This is not true.

One of the most important aspects of the role of an ERG leader is keeping members engaged. This is not an easy task considering that the engagement in an ERG is voluntary and often outside of the responsibilities one has in the organization. Members sometimes have to dedicate their free time and their work can be underappreciated (especially in the initial stages of an ERG set up). Motivating and supporting ERG members requires good knowledge of individuals in your team. Why?

Each person joining your group comes with their own internal motivation to act, their professional and private experience and, above all, their willingness to



do something for others. Paying attention to the following key things will help you maintain engagement in your group:

Internal motivation to take action – each of us has an “eternal flame” that drives our activity no matter if a prize or visibility will be given. The reason for them to act is the ability to have a positive impact on the working environment within the organization. Some people try to find an activity for themselves to run within the ERG which is important for them e.g., new benefit to be available for the group or a discussion panel with the participation of interesting people. This is your biggest ally so tap into it, and remind your colleagues regularly why they are really doing it.

Sense of influence – by giving a person the opportunity to choose, we encourage the development of internal motivation in them. It is better to let the members of that team choose tasks for themselves rather than assigning them. Independence in making a decision within the project may increase the engagement significantly.

Appreciation – people usually like to be acknowledged and hear words of appreciation. When someone praises us for something we are satisfied with, it makes

our effort seen and increases our internal motivation. However, there is a catch – if we regularly hear the same praise from someone, it stops working after a while. You also need to find the way a particular person wants to be appreciated. You can do it many different ways including:

- Acknowledgment during one of the ERG meetings
- Letting the direct manager of the member know about their achievements by describing their commitment and including short descriptions of projects that they led or supported
- Comment/feedback in the Performance Management System
- The award in the company’s internal systems of rewarding e.g., BRAVO (if available)

It may be obvious and simple but the basic word THANK YOU can also make the members appreciate it. Do not forget about it and use it frequently!

Development opportunities (challenges)

– each project may bring challenges that create opportunities for ERG members to develop new skills. Some of these developmental opportunities would be otherwise inaccessible to employees in their daily role.

Knowing individual ERG members may help you to take an individual approach to motivating your members. As I mentioned above, every ERG member is unique so a leader should know their people to support them in achieving their goals and leading the entire group to success.

How to be a charismatic leader who knows how to motivate ERG members?

In people management literature the charismatic leader has the following qualities:

- Strong communicator
- Empathetic (warm) and relatable
- Confident
- Motivational
- Engaging and charming
- Optimistic
- Authentic
- Powerful
- Persuasive
- Driven



While all of these will help an ERG leader, it is “**motivational**” and “**engaging**” that describe the most unique needs placed on your role. There is a big difference between a leader of a team in a formal structure (manager and their direct reports, “contracted work”) and in the informal one (ERG leader and its members, “volunteer work”). I always try to tap into the internal motivation of members of my group. I ask people what they are interested in or what fascinates them. My experience showed me that this internal motivation was always the main factor that maintained the engagement of my committee members throughout the entire project.

It is not always so ideal that all ERG members take only the tasks they prefer. There is always a list of “frog” and “candy” to be performed in daily work of the group. The “candy” is the task that is willingly taken while the “frog” is the one which is skipped by most on the to-do list. Here, too, knowledge of the preferences and experience of committee members will be helpful. What is a “frog” for one, may be “candy” for the other. Another approach may be to establish that each ERG member takes over an item from the “frogs” and “candies” lists. Remember also about challenging your members from time to

time and giving them an opportunity for personal and professional development. That means encouraging members to take tasks that will help them develop their skillsets.

There is also another aspect that helps ERG leaders to be charismatic. It is authenticity. ERG leaders who are authentic will be able to build trust that is essential to good teamwork and collaboration. You need both in a successful ERG. Authentic leaders live by a strong moral code, and ensure they “do the right thing”, even when this is not the easiest thing to do. To be able to do that, you need to:

- be honest and show integrity, if there is consistency in the things you do, people will believe you will do the right thing.
- have and live a personal set of values, that make it clear who you really are to people, and how your values guide your decision-making.
- be visibly committed, so people can see from your behaviour what is important, not just rely on your words.
- be self-aware, so you can feel how people react to you and what you say.

Last but not the least – you should also remember about YOU and your needs. According to “The 7 Habits of Highly Effective

People” by Stephen R. Covey, “sharpen the saw” is also critical for you to be an effective leader and ensure you stay mentally healthy. It means “preserving and enhancing the greatest asset you have – you.” You need to find a balanced program for self-renewal in the four areas of your life: physical, social/emotional, mental, and spiritual. Give yourself permission to be sometimes on “standby” mode and take activity that helps you to recharge your internal batteries. It may require you to divide some responsibilities among members. It will give them development opportunities, increase their visibility, and at the same time show your appreciation.

OUR TIP!

Create the role of “Buddy”, who will be a great support for new joiners going forward. “Buddy” may onboard a member to the ERG rules and daily routines. Such a relationship may be a great opportunity for future co-work in case of bigger projects. When assigning such a role, remember that it requires certain qualities from the Buddy, such as openness, communication skills, the ability to transfer knowledge or be relatable.



Why is it so important to be in constant touch with senior management and middle management?

An ERG’s activity, through its influence on the inclusion in the workplace, has a measurable effect on the business results of the organization. Usually, an ERG is created as a result of a bottom-up initiative, so the alignment with business objectives has already been established and leadership buy-in had been secured. To further develop your group, you need to always consider the perspective and goals of the management in your organization. Senior leadership could play important roles for you – they could be executive sponsors or allies or both.

Open communication between the ERGs leaders and management allows for the exchange of information and opinions, and helps both stay engaged. Senior management or simply CEOs of the company are those who may support an ERG in many aspects:

They explain the vision and goals of the organisation including the commitment to diversity and inclusion. It is very important for an ERG leader to understand them so you can contribute. You are very well positioned to propose introducing changes in the company’s approach or policies.

Management that cares about the good of employees will listen to the voice of ERGs. You can bring the needs, concerns, and case studies highlighting the situation of the employees your group represents and propose solutions. When you present information to senior leaders make sure to present data about the current situation in your organization and, include specific proposals for solutions.

The management could (and should) show their support of your ERG by mentioning your activities when addressing the whole organization. It could be a statement of support mentioning examples of a successful ERG in the organisation during a town hall, or in a written communication to employees. This sends a powerful message that the management supports and appreciates your group and often boosts the morale of your members. Some organizations have special awards for the most active employee groups. That’s a great way to show the importance of the work ERGs do for the organization, and at the same time, to appreciate its members and leaders.

Management team mostly provides the financial resources for ERG’s activity. For this reason, the ERG lead or person playing the custody role may be asked to

report the current budget consumption and other budget related aspects.

Is there an important difference between senior management and middle management in ERG support?

People managers are those who are the closest to the regular employees and, they are often the point of the information about what is happening in the organization. That's why they should be well informed about the activities and upcoming events of your ERGs.

Additionally, direct managers can be an invaluable source of feedback about the activities of your group. They can tell you what kind of support their employees expect to get and what challenges they might have. Line managers are those who may encourage their direct reports to engage in ERG initiatives both as a recipient or an active member who runs the projects within the group. The direct manager is the person who should support the ERG members and allow them to adjust business tasks so that they also find time to be engaged in an employee network.

OUR TIP!

Sometimes it is worth meeting directly with the supervisor of the person who is considering involvement in an ERG to explain what that would mean for this particular employee. This can include the amount of time per week required, the tasks that the person will potentially perform, and the competencies they will develop. When your organisation clearly states the full support for D&I activities of their employees, you can mention it during that conversation. This will help avoid difficult situations with managing the workload and employee-manager relationship. Additionally, I recommend sending information about completed projects and tasks by your ERG members to their direct managers during the annual performance review period (if applicable). It gives measurable information on how the time spent by the employee has been used.



Summing up, what can be done to be in good, professional relations with the company's management?

The important aspect both for senior managers and line managers is to **keep them informed on a regular basis** about ERGs (each of them needs tailored communication). Line managers want to be up to date with what is happening in the company in various aspects to be able to support their direct reports and answer their questions about activities they can participate in.

Additionally, an ERG should be **open to management feedback** and be a discussion partner. You need to be professional and show your point of view and also "challenge" them if required e.g., by asking for solutions unavailable to the ERG due to budget constraints. This helps to keep both sides (ERGs and management) on the same page and, work together towards creating the future of your organisation.

HR and ERGs.

The Human Resources department is an equally important partner for activities for ERGs. All aspects of D&I are part of the

company's HR policy. ERGs are in the best position to review and provide feedback on HR policy and, also the reality of how this policy works. ERGs can provide suggestions or ideas created based on conversations with employees and, the HR department that would address reported challenges and demands. This is an ideal example of a smooth cooperation between the HR team and the ERG. For example, this can be the creation of a program that supports employees coming back from parental leave which will increase the number of employees coming back to our company instead of changing jobs.

Another aspect of the cooperation of the ERG and HR may be ensuring that the benefits system available in the company works effectively for all groups of employees. The ERG can provide feedback or ready-made benefits proposals including a multisport card that is available also for children of the employees, providing health insurance of an employee's partner regardless of their gender and marital status, tailoring the policies to the chosen family recognizing the diversity of family arrangements within the LGBTQ+ community, or providing trans-Inclusive healthcare benefits.

And what can an ERG gain from a good relationship with the HR team?

Invaluable data regarding organizational statistics or support in communicating initiatives taken by an ERG. The initial stages of ERG operation may require obtaining a lot of data on the demographic structure of your company, e.g., the average age of employees or gender ratio among management staff. Before you start your work in the organization, check what is already working, what has already been tried out and with what results, and what are the plans for supporting a given group of employees within the HR department. This will allow you to avoid “reinventing the wheel” and potential frustration of people in the HR team at the sight of a “brilliant” idea that has already been tested by the department.

D&I team

Cooperation with the D&I group in my organization is almost an everyday activity for me. Organizations differ in terms of the structures they have that support diversity and inclusion work. Regardless of how big is the D&I team in your organization, **collaborating with them can only bring benefits – ultimately you have the same goals.** From my perspec-

tive as an ERG leader, what ERG brings to the D&I team is a bottom-up perspective and feedback. The D&I team on the other hand can support an ERG through communication, facilitating connections across a global organisation, or showing the larger perspective and the strategy of the organization. The D&I team may also help you in searching for solutions and provide you with the contacts to the professional institutions like non-profits that may support your activities. Certain initiatives can be undertaken together e.g., a review of organizational policies through the lens of the needs of your group or showing good practices from outside of your company. ERGs can also be a part of Employer Branding (EB) activities related to showing activities that make the workplace more inclusive.

Sponsor. What is this role?

The executive sponsor role has been mentioned in the previous part of the Playbook. This time I would like to show a slightly different point about this role. Sponsors will help you secure a budget for your activities, but this is just a small part of their role.

I think about a sponsor as a “good spirit” who provides support when asked for.

This role requires to e.g.:

- Be passionate about the D&I and/or supporting a particular group
- Act as an enabler
- Ensure alignment of goals and direction with an overall business strategy or
- Building support (and overcoming resistance) from other senior executives

Sponsor should learn about and understand the reality of the group they support and at the same time, provide constructive feedback on the strategy and operation of the ERG and how it is perceived externally. Sponsors are simply allies and champions for a given ERG. These roles are most often played by experienced business executives who join the management board or are key managers directors (depending on the size of the organization). This allows you to use their extensive professional experience and their perspective on matters other than the lead or members of ERGs.

How about cooperation with other ERGs within the organization? Let us build together!

I described this type of ERG cooperation before, but I want to highlight how important it is to pay attention to your relationships with other networks in your



organization. It is this collaboration that has great potential for doing BIG things. It is by joining forces, resources, visions and ideas that we can do a lot. There is no room for competition here because each ERG has its own unique perspective. We have more things that connect us with other groups than divide us. By building relationships with other networks, you gain allies for your work that can support you in overcoming common challenges. It's good to coordinate events that you organize and, send information about your upcoming events to other ERGs with a request to share it with their recipients.

I wish you fruitful conversations with the management team and sponsors and keep my fingers crossed for unique events organized by your ERGs in cooperation with others!

SECTION 3: “G” LIKE GLOBALLY OR LOCALLY

The activities of an ERG will depend on an organizational context – the size and structure, business objectives, how advanced it is on the diversity and inclusion journey, and many more. If you work for a global company, I want you to think about how it impacts the activities and opportunities you have. Is your ERG a local initiative that responds to local needs only? Or is it also possible to operate globally? As an employee of a global bank with operations around the world and a truly global culture, I see that ERGs supporting the same groups are created in different locations. However, their activity, while similar in some aspects, also differs quite a bit due to national culture, legal regulations, or political context. Being a working mother like myself means different things in different countries. For example, regulations regarding the period of parental leave in the US and Poland are so different (there is no guaranteed paid parental leave in the US). That means that supporting a mother in her return to work will be very different.

A similar situation will apply to the realities of Black and racialized employees, LGBTQ+ employees, or employees with

disabilities (and many more groups!). While there are certainly the same patterns in the barriers and discrimination these groups experience, in each location might also have unique sets of challenges. Here arises the question, is global cooperation possible and worthwhile? We will consider it in more detail below.

How to cooperate globally within one organization?

Start by checking who is there! This should be the first step when considering a cooperation across a global organization. According to the saying “do not reinvent the wheel”, just find out if there are ERGs to cooperate with and what they have been doing. Your organization may already have some “lessons learnt”, from that you can leverage – learn from others will speed up launching your activities or boost your newly created group. You might be surprised but, there might already be a few existing ERGs with the same focus as yours. These groups might have already tried certain initiatives with varying results and they could give you valuable advice regarding specific tasks and unexpected challenges. However, remember that the reason that certain

events may have or may not have been successful may depend on a given place and time. When that changes so may the ultimate result.

Cooperation with other ERGs globally, may also be beneficial from a financial and developmental perspective. You can co-fund the event or activity and, also give your members the opportunity to work in global teams which is a great opportunity for professional development. Regular meetings with ERG members and leaders from other locations foster creativity, provide inspiration, and energize you.

A global cooperation between ERGs brings many opportunities so, leverage them if you can. However, if your organization is not global, or does not have similar ERGs in different locations, do not feel lost. If you will be the first ERG leader in your company (or you already are!), you

can always look at examples from various global companies or reach out to people in other organizations.

Does your ERG plan to have only an internal focus, or do you want to support the local community too?

The challenges and barriers that the work of your ERG addresses within the organization are important and difficult social problems that play out in the community and society at large. There are likely many organizations that have a similar mission that you do. If you can (in some cases there are barriers related to internal policies), do collaborate with foundations or other non profits as this can bring a lot of good for both parties. There is a long list of non-governmental organizations (NGOs) I collaborate with joining their projects which support e.g., working mothers, women that experienced violence, LGBT+ people.



What examples of collaborative activities might be?

I'll start with what you and your colleagues can do for the non-profit. They often run programs and projects that need volunteers who are interested in a given topic and have experience with it. The professional and business experience of your members can be very beneficial and useful. You can also advocate that your organization donates money to support a non-profit. I will talk more about these kinds of activities when discussing **Corporate Social Responsibility "CSR"** in a moment.

Mentoring is a great example and a popular activity on which ERG members collaborate with non profits. Your group could act as mentors that support professional development of people with barriers in accessing the labour market like people with disabilities or mothers returning to work. Mentoring brings benefits for both sides of the relationship, and I strongly believe that ERG members (or other employees) gain a lot from this personally and in the business aspect.

On the other hand, an ERG can use many forms of support from non profits. The specialists employed in them can provide you with workshops and webinars, they

can participate in your discussion panels and present their latest research or projects which is a great way to educate your organization. Examples include:

- Meeting with child psychologists
- Discussion panel on women's rights and building their role in business
- Portals where ERGs can externally share their activities or the success stories of their employees
- Workshops for parents on nonviolent communication "NVC"

My fellow ERG leaders cooperate with non profits to create leadership development opportunities for their members through participating in a mentoring program for newcomers, hire them to conduct workshops on specific topics, e.g., intercultural competence, inclusion of transgender employees, mental health, or hire them as consultants to make the workplace more accessible, or collaborate to reach an untapped talent pool.

Can ERG engage into CSR or Employer branding activities?

Let's start with shortly defining what exactly CSR and Employer branding are? **Corporate Social Responsibility (CSR)** is a management strategy, according to

which enterprises voluntarily take into account social interests, environmental aspects or relations with various groups of stakeholders, in particular with employees. Being socially responsible means investing in human resources, in environmental protection, relations with the company's environment and informing about these activities, which contributes to an increase in the company's competitiveness and shaping conditions for sustainable social and economic development. **Employer branding (EB)** as the name suggests, is building the employer's brand and is divided into internal (addressed to current employees) and external (to potential future employees) parts. Activities of this category are aimed at increasing the retention of current employees and

showing the attractiveness of the employer for candidates.

CSR is being talked about more and more as a sincere interest and responsibility for the local environment in which we operate as a business. There are three main aspects of CSR activity: activities for the local community, social campaigns and pro-ecological activities. All of them may engage ERG's members but the most popular are social campaigns and activities for the local community. The list of activities to participate in is really long and will depend on the resources, local opportunities, and virtual opportunities (the pandemic increased the possibilities in this aspect). Here are some examples of CSR and EB activities that your ERG can take on:

CSR:

- supporting children from orphanages in learning school subjects or a foreign language
- mentoring for beneficiaries of non-profit projects
- supporting refugees
- fundraising
- investing in specific projects



EB:

- interviews (storytelling) with ERG representatives showing the commitment of both themselves and the organization to the subject of D&I
- participating in reports on working conditions and benefits available for the D&I interest group



Of course, all employees of the organization can take part in these activities, but it is often an ERG that starts this kind of collaboration.

SUMMARY

Running an effective ERG is a complex topic. As you have already noticed, it has many components ranging from preparing a good action plan, having a motivated and engaged project team, securing and managing a budget, to building and maintaining relationships with the management, sponsors, HR and other ERGs. Activities that the ERG undertake are an extremely important way of supporting company employees in various aspects of their lives in a way that truly responds to their needs. Efficiently operating ERGs can also support the local community through CSR and EB initiatives.

Considering the variety of tasks, responsibilities, complexity of dependencies and relationships – an ERG is a unique team of people. For me, it is a pool of enormous energy, passion and potential that lies dormant in their members and future members.

Your task – the leader of this potential – is to find the strengths of the people you

work with, show them the vision and mission that you will create together, and be a good listener. You should outline the direction and framework in which you want to act, but give people space for their ideas, how to implement them, and at the same time be next to them when they ask for support. Don't be afraid to ask and knock on doors, even of the CEO's office. It is your actions that can change the working conditions in your organizations, your local community or even change someone's life for example, through mentoring support. Experience in the role of an ERG Leader gives exposure to professional, private, but also long-term and valuable relationships with other people.

I keep my fingers crossed for you!

Monika



WE HELP ORGANIZATIONS REALIZE THE FULL POTENTIAL OF ERGS

ERG Center ERGs was created by a team of passionate believers in the power of employee networks.

We are a group of Diversity, Equity, and Inclusion leaders, ERG leaders, and other dedicated professionals who share a vision of **EFFECTIVE**, **CONNECTED**, and **VISIBLE** ERGs.

Together we:

- Support organizations with setting up and maintaining effective ERGs
- Create learning opportunities and share knowledge
- Bring people together and build connections
- Showcase promising practices and increase visibility of ERG leaders

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