

MAY 9-10 | BMO INSTITUTE FOR LEARNING | TORONTO

ERLI

2018

**WORKPLACES THAT WORK:
BUILDING BRIDGES THROUGH ERGS**



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CATALYST.ORG/ZING

Check for our latest entries and leave your thoughts and reactions on our blog, Catalyzing, which brings together many voices and perspectives from across Catalyst and beyond.



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Join this Catalyst group to participate in conversations pertinent to expanding career opportunities for women and business, and diversity and inclusion in general, with others who are leaders in their industries.



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View our powerful and timely videos on women and business, including previous Catalyst Award Winner videos.



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"Like" Catalyst to get the latest news about women in the workplace and global diversity issues, engage in discussions with us and other people, and stay in the know about new Catalyst initiatives.

MARC ONTHEMARC.ORG

Join MARC—Men Advocating Real Change—Catalyst's online learning community for professionals committed to achieving equality in the workplace.



About Catalyst

Catalyst is a global nonprofit working with some of the world's most powerful CEOs and leading companies to help build workplaces that work for women. Founded in 1962, Catalyst drives change with pioneering research, practical tools, and proven solutions to accelerate and advance women into leadership—because progress for women is progress for everyone.

About BMO Financial Group

Serving customers for 200 years and counting, BMO is a highly diversified financial services provider—the eighth largest bank, by assets, in North America. With total assets of \$728 billion as of January 31, 2018, and a team of diverse and highly engaged employees, BMO provides a broad range of personal, commercial, wealth management, and investment banking products and services to more than 12 million customers. BMO conducts business through three operating groups: Personal and Commercial Banking, BMO Wealth Management, and BMO Capital Markets.

About Diversity & Inclusion at BMO Financial Group

BMO has a longstanding legacy as a leader in promoting diversity and inclusion. Diversity, and how we learn from each other's differences, is a value at BMO. We believe a diverse and inclusive workplace inspires greater innovation, leads to stronger performance, and ensures that our employees and customers feel valued, respected, and heard.

What is **ERLI**?

The Catalyst Employee Resource Leadership Initiative (ERLI) engages and connects Employee Resource Group (ERG) leaders—from any demographic, including across companies, industries, functions, or regions—to share ideas and practices while learning how to amplify inclusion. Through a variety of formats, including virtual and live events, ERLI trains ERG leaders to drive inclusion within their companies at the individual and group levels. Outcomes for participants include building strategies for enhancing the ERG's business and inclusion impact, creating and extending a network of external ERG contacts at other Catalyst Supporter organizations, and enhancing the development of inclusive leadership skills and behaviors.

What Does ERLI Entail?

WORKPLACES THAT WORK: BUILDING BRIDGES THROUGH ERGS

This conference for ERG Leaders and executive sponsors will give you the tools that play an integral role in opening dialogue and creating a safe, inclusive environment for all employees.

VIRTUAL AND LIVE EVENTS

Periodic webinars feature guest panelists, while live ERG roundtables for Catalyst Supporters are held globally.

AN ERG COMMUNITY

ERLI connects you with ERG leaders across organizations via social media platforms. Post your questions, and receive responses from other companies and Catalyst experts. Visit [LinkedIn.com/groups/8179760](https://www.linkedin.com/groups/8179760) to join.

Welcome to ERLI 2018

Catalyst and BMO Financial Group welcome you to the fourth annual Employee Resource Leadership Initiative (ERLI) Conference, **ERLI 2018–Workplaces That Work: Building Bridges Through ERGs**, where we'll focus on how ERGs can play an integral role in opening the dialogue and creating a safe, inclusive environment for all employees.

With more than 20 years of experience working with ERGs across industries and regions, Catalyst understands that a powerful ERG enables organizations to increase employee engagement, connect to the communities in which they conduct business, and drive bottom-line improvement.

During today's Conference, you'll:

- Discover the impact ERGs can have on business performance.
- Learn best practices for how to effectively communicate your ERG's goals.
- Hear how your ERG can help build a more inclusive, more empathic workplace culture, with a deep-rooted sense of fair play, using robust conversations guided by empathy.
- Gain insights on how your ERG can become more inclusive and engage more employees outside of your target constituency.
- Learn from Catalyst Award-winning best practices about the critical role ERGs play in fostering inclusion across difference in a rapidly changing world.
- Network with other ERG leaders and discuss best practices across different functions, industries, and geographies.

Whether you're an ERG leader, an executive sponsor, or a member of one or more of your organization's ERGs, we are inspired that you've joined us here at the BMO Institute for Learning to help build workplaces that work for all employees.



A handwritten signature in black ink, appearing to read 'T. Van Biesen'.

TANYA VAN BIESEN
Executive Director, Canada
Catalyst



A handwritten signature in black ink, appearing to read 'D. White'.

DARRYL WHITE
Chief Executive Officer
BMO Financial Group



Agenda

ERLI 2018

May 9

5:30 PM REGISTRATION OPENS

6:00-8:00 PM OPENING REMARKS AND NETWORKING RECEPTION

Speakers

- Gina Jeneroux, Chief Learning Officer, BMO Financial Group
- Tanya van Biesen, Executive Director, Canada, Catalyst

May 10

7:30-8:30 AM REGISTRATION AND BREAKFAST

8:30-8:45 AM WELCOME AND OPENING REMARKS

Emcee

- Alicia Sullivan, Senior Associate, Corporate Engagement, Catalyst

Speakers

- Vandana Juneja, Senior Director, Corporate Engagement, Canada and Asia-Pacific, Catalyst
- Rajini Nagendran, Chief Inclusion Officer, BMO Financial Group

8:45-9:45 AM FIRESIDE CHAT

Tanya van Biesen, Executive Director, Canada, Catalyst, discusses the impact ERGs have on business performance through their alignment with organizational goals with senior leaders from BMO Financial Group.

Speakers

- Deland P. D. Kamanga, Head, Global Fixed Income, Currencies & Commodities, BMO Capital Markets
- Rajini Nagendran, Chief Inclusion Officer, BMO Financial Group
- Tanya van Biesen, Executive Director, Canada, Catalyst

9:45-10:00 AM WARM-UP NETWORKING ACTIVITY

Pair up and discover the common bonds you and your partner share during this warm-up networking activity.

10:00-10:15 AM NETWORKING BREAK

10:15-11:45 AM FOSTERING PSYCHOLOGICAL SAFETY THROUGH INCLUSION

ERGs not only create safe and inclusive environments for their members but can also be leveraged to amplify inclusion across your organization. This hands-on, interactive session will explore the concept of psychological safety and its central role in creating an inclusive workplace culture that fosters engagement and innovation. Harness the skills to build a culture of psychological safety that promotes open dialogue and an inclusive environment for all.

Speaker

- Tolonda M. Tolbert, PhD, Senior Director, Inclusive Leadership Initiative and Consultant, Consulting Services, Catalyst

11:45 AM-12:45 PM LUNCHEON

12:45-1:30 PM KEYNOTE: YOU BELONG HERE

Belonging is the new frontier of diversity and inclusion efforts, and it will be driven by leaders of Employee Resource Groups. In an interactive speech, Erin calls for solidarity across communities struggling for liberation in the workplace and beyond. Erin will lead a discussion on vital questions of belonging, sharing best practices and personal anecdotes. Erin believes that the future of our movement is intersectional—it is both our only way forward and our greatest asset. When we create spaces where everyone feels acknowledged, appreciated, and celebrated, we open our companies to infinitely beautiful possibilities.

Speaker

- Erin Uritus, CEO, Out & Equal Workplaces Advocates

1:30-1:45 PM NETWORKING BREAK

1:45-3:15 PM CONCURRENT BREAKOUT SESSIONS

(Please attend the session listed on your name badge.)

Telling Your Story: Inclusive Communication as a Critical ERG Strategy

Key to any ERG's success is building a comprehensive communication strategy. Learn how to communicate more inclusively by exploring strategies for overcoming common roadblocks and discussing best practices for effectively championing your ERG's goals, progress, and successes to both internal and external constituents.

Speakers

- Ben McDowell, Senior Consultant, Diversity & Inclusion, Nationwide
- Julie S. Nugent, Vice President, Research, and Chair, Catalyst Award, Catalyst

Building Empathy Through ERGs

Empathy is the key to understanding others' perspectives. Learn how your ERG can help build a more inclusive, more empathic workplace culture with a deep-rooted sense of fair play using robust conversations guided by empathy, where participants connect across difference, listen with humility, and inspire others while addressing workplace challenges faced by diverse colleagues.

Speaker

- Yvonne SoBeach, Senior Advisor, "Being BMO," BMO Financial Group

The Keys to Building Bridges: Engaging Allies Across ERGs

Learn how your ERG can become more inclusive and engage more employees outside your target constituency. Gain insight into how your ERG can work alongside other ERGs to address what employees with intersecting identities face. Go beyond engaging senior leaders as executive sponsors to grow your ERG's impact and build bridges with allies at all levels across your organization.

Speakers

- David Lau, Senior Associate, Corporate Engagement, and Project Manager, Catalyst Award
- Kimberley Messer, LGBT+ Business Development Leader, North America, IBM
- Jennifer Thorpe-Moscon, Senior Director and Panel Manager, Research, Catalyst

3:15-3:30 PM NETWORKING BREAK

3:30-4:00 PM CLOSING ACTIVITY AND REMARKS

Together, we will reflect upon the day and identify next steps to bring what we've learned back to our ERGs and organizations.

Speaker

- Vandana Juneja, Senior Director, Corporate Engagement, Canada and Asia-Pacific, Catalyst

4:00-5:30 PM NETWORKING RECEPTION

FOSTERING PSYCHOLOGICAL SAFETY THROUGH

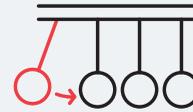
Inclusion

EACH BEHAVIORS



EMPOWERMENT

You enable direct reports to develop and excel.



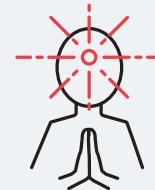
ACCOUNTABILITY

You demonstrate confidence in direct reports by holding them responsible for performance they can control.



COURAGE

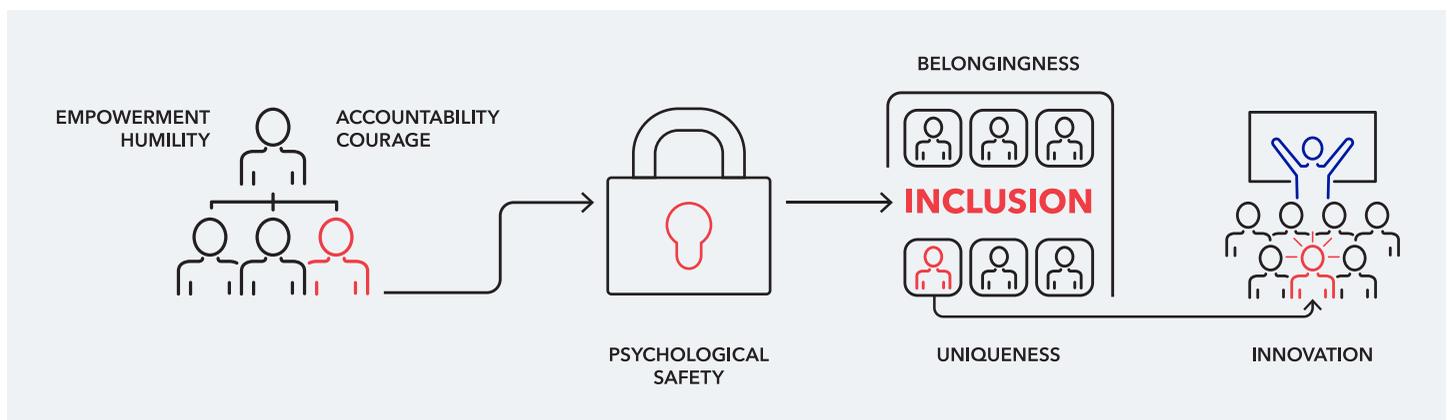
You put personal interests aside to achieve what needs to be done; you act on convictions and principles even when it requires personal risk-taking.



HUMILITY

You admit mistakes, you accept and learn from criticism and different points of view; you seek contributions to overcome limitations.

EACH Culture: Psychological Safety Predicts Inclusion and Innovation



PSYCHOLOGICAL

S A F E T Y S C E N A R I O S

SCENARIO 1

A new employee who's shown a lot of promise has been unusually quiet during team meetings. You ask the individual's direct supervisor what may be going on to impact this employee's participation. The supervisor responds that the current plan for operationalizing the organization's strategy concerns the employee, because at their last job this same decision had negative repercussions. When you ask why the employee didn't speak up, the supervisor says it is because everyone was in consensus and the employee didn't want to take the risk to go against the grain. How can you use EACH behaviors to make it comfortable for all employees, regardless of level, to voice a different opinion?

SCENARIO 2

You're the manager of a tight-knit team that has been working together for more than three years. You've recently added a new team member to manage workload and capacity issues. The person you've hired transferred to the team from a different department with a reputation for being hyper-competitive—every person for him- or herself. Prior to the new hire joining the team, two members of your existing team express concerns that they'll now not receive promotions due to budget constraints. When the new hire joins the team, you observe these two employees passively-aggressively undermining the new team member's efforts effectively creating an "us vs. them" dynamic. For instance, they have "pre-meetings" without the new hire to decide what they as a sub-team will and won't support in the full meeting. Using EACH behaviors, how will you help this group come together as a united team to support each other's work efforts?

SCENARIO 3

You've been transferred to a new global virtual team. This is your first time managing a remote team, and you have team members you've never met in person. The previous manager gave you a rundown on each team member, documenting their mistakes and successes and advises you to steer clear of giving new opportunities to those who have failed in the past. As a first project, your team has been assigned a high-profile project that requires innovative thinking. As a first step, you communicate the business challenge to the team and request that each team member offer some initial ideas about an approach to the challenge. In the follow-up conference call, several team members are silent. You hold one-on-one meetings with each team member and learn that there is a culture of fear of making mistakes that will permanently damage their careers. Using EACH behaviors, how will you help your team feel confident their mistakes won't be held against them?

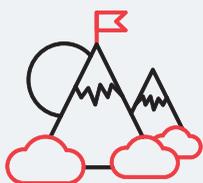
SCENARIO 4

You are the manager of a high-performing team that has been operating as a well-oiled machine. The organization has recently been acquired by a larger company, and there have been changes to the team's goals and operating processes. Team morale has plummeted. Individual team members are struggling with the new company's corporate culture, having observed some questionable behaviors that go against long-held organizational values. Nobody has stepped forward to report any specific behaviors, but there are plenty of stories in the rumor mill. Using EACH behaviors, how will you create an environment where team members feel safe speaking up about problems and tough issues?

EACH

HOW INCLUSIVE LEADERS PRACTICE

LEAD



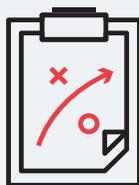
SHARE STRUGGLES

Be transparent about struggles and leadership challenges.



PROVIDE AIR COVER

Provide protection and support when colleagues encounter difficulty and challenges.



CREATE A COACHING CULTURE

Make EACH behaviors normative through peer coaching.



LEAD WITH HEART

Show your vulnerability and make authentic connections.

Leading
change by
**promoting
diversity.**



BMO commends the dedicated Enterprise Resource Groups who are shaping the future of business by building more inclusive work environments.

10 ACTIONS TO BUILD WORKPLACES THAT WORK FOR *Women*

Catalyst has solutions for each step of the way. To learn more, contact Audrey Gallien, Senior Director, Business Development at agallien@catalyst.org.

1 BUILD AN INCLUSIVE CORPORATE CULTURE

- Workshop: Fostering Innovation Through Inclusion
- Workshop: Developing Talent Through Inclusive Leadership
- Webinar Recording: Sexual Harassment in the Workplace
- Online CatalystX Course: Leading With Effective Communication

2 INCENTIVIZE INCLUSIVE LEADERSHIP

- Workshop: Becoming an Inclusive Leader
- Expert Presentation: Inclusive Leadership for Everyone
- Online CatalystX Course: Becoming a Successful Leader

3 SHINE A LIGHT ON WOMEN OF COLOR

- Workshop: Improving Inclusion on Teams—Gender, Race & Ethnicity
- Webinar Recording: Day-To-Day Experiences of Emotional Tax Among Women and Men of Color in the Workplace

4 ENGAGE MEN AS CHAMPIONS

- Workshop: MARC Leaders
- Workshop: MARC Leaders Executive Dialogue
- Workshop: Championing Change
- Expert Presentation: Engaging Men as Change Agents

5 UNLOCK "HOT JOBS" TO HELP ACCELERATE WOMEN'S CAREERS

- Workshop: Take Charge of Your Career
- Workshop: Unwritten Rules to Advancement
- Expert Presentation: Negotiate Your Role
- Expert Presentation: Sponsoring Women to Success

6 SHAKE UP YOUR BOARD

- Catalyst Corporate Board Services
- Catalyst Women On Board™

7 UNMASK UNCONSCIOUS BIAS

- Workshop: Interrupt Unconscious Bias: Become an Inclusive Leader
- Workshop: Creating Your Inclusive Communication Style
- Expert Presentation: Workplace Bias—Stopping Microaggressions
- Online CatalystX Course: Unconscious Bias: From Awareness to Action

8 GET REAL ABOUT GENDER, RACE AND ETHNICITY

- Expert Presentation: Managing Diverse Teams Through Inclusion
- Online CatalystX Course: Communication Skills for Bridging Divides

9 CLOSE THE WAGE GAP—IMMEDIATELY

- Webinar Recording: Actions to Make Every Day Equal Pay Day

10 PRIORITIZE PRODUCTIVITY OVER PHYSICAL PRESENCE

- Expert Presentation: Work-Life Effectiveness
- Online CatalystX Course: Get Beyond Work-Life Balance

Resources

The image features a solid pink background. A thin blue line starts from the left edge and slopes downwards towards the right. Below this line, there are several decorative blue shapes: a large, elongated, teardrop-like shape on the left; a smaller, similar shape below it; and a cluster of three overlapping, leaf-like shapes on the right side, positioned above the word 'Resources'. The word 'Resources' is written in a blue, cursive script font, centered horizontally in the lower half of the page.

UPCOMING WEBINARS

Register at [Catalyst.org/webinars](https://catalyst.org/webinars)

FLIP THE SCRIPT TO CREATE LGBT-INCLUSIVE WORKPLACES

June 6, 2018

How do we create a truly inclusive work environment if we don't engage all of our employees? When thinking about all dimensions of diversity, it takes each of us to create a workplace that fits for everyone. Join this session to learn more about what it means to be LGBT in the workplace, and how to be an ally to the community.

In recognition of LGBT Pride Month, this webinar will provide an overview of common barriers to LGBT workers' advancement and the actions individuals and organizations can take to create a more inclusive workplace for LGBT employees. This webinar will be most helpful for individuals, managers, leaders, and employee resource groups.

TRANSGENDER INCLUSION AT WORK

June 20, 2018

A truly effective diversity policy includes all aspects of diversity, including gender identity and gender expression. The sooner organizations recognize the importance of gender identity and gender expression as a workplace issue, the more inclusive the workplace can become. When companies support and hire transgender workers, they not only improve the recruitment and retention of transgender employees, but also of "fair-minded employees."

Join this webinar to hear policies and practices to create inclusive workplaces for everyone—no matter what their gender identity or expression.

CONVERSATION GROUND RULES—GENDER, RACE, AND ETHNICITY IN THE WORKPLACE

July 25, 2018

Talking about our differences is difficult. Discussing how some aspects of your identity differ from other people's—and ways you may experience privilege and disadvantage—can feel uncomfortable, accusatory, and potentially threatening. In the workplace, people often struggle with how or even whether to raise these issues. To effectively communicate across differences and build inclusive workplaces, openness and the ability to have difficult conversations are needed.

Join us as we share insights from Catalyst's tool, "Engaging in Conversations About Gender, Race, and Ethnicity." We will explore roadblocks that stifle difficult conversations and discuss actions you can take to make those discussions go smoothly.

REPORTS AND TOOLS

Learn more at [Catalyst.org/browse](https://catalyst.org/browse)

- Day-To-Day Experiences of Emotional Tax Among Women and Men of Color in the Workplace
- Catalyst Guide to Employee Resource Groups – 6 Volumes
- Sexual Harassment in the Workplace: How Companies Can Prepare, Prevent, Respond, and Transform Their Culture
- Sexual Harassment in the Workplace: What Employees Need to Know
- Sexual Harassment in the Workplace: What Employers Need to Know
- Actions Men Can Take to Create an Inclusive Workplace
- Engaging in Conversations About Gender, Race, and Ethnicity in the Workplace
- Conversation Ground Rules
- Flip the Script: Race & Ethnicity in the Workplace
- Flip the Script: LGB in the Workplace
- Flip the Script: Women in the Workplace
- Flip the Script: Men in the Workplace
- Be Inclusive Every Day
- I Am an Ally

CATALYSTX FREE ONLINE COURSES

Learn more at [Catalyst.org/CatalystX](https://catalyst.org/CatalystX)

COMMUNICATION SKILLS FOR BRIDGING DIVIDES

- Features Discussion Facilitation Guide

UNCONSCIOUS BIAS: FROM AWARENESS TO ACTION

- Features Discussion Facilitation Guide

INCLUSIVE LEADERSHIP TRAINING

- Becoming a Successful Leader
- Leading With Effective Communication
- Get Beyond Work-Life Balance

CORPORATE ERG PRACTICES

Learn more at [Catalyst.org/case-studies](https://catalyst.org/case-studies)

GENERAL

- 3M–I’m in. Accelerating Women’s Leadership*
- Barclays–How Barclays Is Creating an Inclusive Workplace
- Citigroup Inc.–Meeting Local Needs: Employee Network Groups at Citigroup
- Credit Suisse Switzerland–Employee Networks: Creating a Platform for Learning
- CVS Caremark Corporation–Supporting the Diversity Mission Through Colleague Resource Groups
- General Mills Inc.–Success Through Employee Networks
- IBM Canada–Enhancing Inclusion Through Critical Relationships and Cultural Awareness
- Kimberly-Clark Corporation–Unleash Your Power: Strengthening the Business With Women Leaders*
- Nationwide–Our Associates’ Success Drives Business Success*
- Procter & Gamble–Everyone Valued, Everyone Included, Everyone Performing at Their Peak™*
- Rockwell Automation–The Culture of Inclusion Journey*
- Sodexo–Making Every Day Count: Driving Business Success Through the Employee Experience*

WOMEN

- Chevron Corporation–The Chevron Way: Engineering Opportunities for Women*
- Cisco Systems, Inc.–Developing Women: Cisco’s Executive Shadowing Program
- DuPont–DuPont Women’s Network
- Enbridge Inc.–FEMINEN: FEMales IN ENgineering Employee Resource Group
- General Electric–Developing Women Leaders: Synergistic Forces Driving Change*
- The Hartford Financial Services Group, Inc.–How Culture Change and Gender Inclusion Enabled One Company to Prevail
- IBM Corporation–Women’s Diversity Network Group
- Kimberly-Clark Corporation–One Women’s Interactive Network (One WIN)
- Moss Adams LLP–Forum W: Increasing Opportunities for Women in Public Accounting
- Weil, Gotshal & Manges LLP–Advancing Women in Law
- Time Warner Inc.–Creating A Unified Culture: Investing In Our Women Leaders

*Denotes Catalyst Award-Winning Initiative

CORPORATE ERG PRACTICES

LGBT

- Chevron Australia–PRIDE: LGBT Inclusion, Intersectionality, and Collaborative Partnerships
- The Chubb Corporation–Lesbian, Gay, Bisexual, and Transgender (LGBT) Inclusion at Chubb
- Ernst & Young LLP–Lesbian, Gay, Bisexual, and Transgender Inclusion at Ernst & Young: bEYond
- Ford Motor Company–GLOBE: Fostering LGBT Inclusion, Valuing Diversity, and Empowering Authenticity
- KPMG LLP Canada–Lesbian, Gay, Bisexual, and Trans-Identified (LGBT) Inclusion at KPMG LLP Canada: pride@kpmg
- Nationwide–Prioritizing LGBT Workplace Inclusion
- Scotiabank–Lesbian, Gay, Bisexual, and Transgender Inclusion at Scotiabank: Scotia Pride
- Whirlpool Corporation–PRIDE: Lesbian, Gay, Bisexual, Transgender and Allied Inclusion

GENDER, RACE, AND ETHNICITY

- BNY Mellon–Fostering Global Inclusion and Multiculturalism
- General Motors Corporation–Recruiting, Advancing, and Retaining Women of Color Through the Multicultural Women’s Affinity Group
- PepsiCo, Inc.–Women of Color Multicultural Alliance*

*Denotes Catalyst Award-Winning Initiative

Save
the Date

**CATALYST CANADA HONOURS
CONFERENCE AND DINNER**

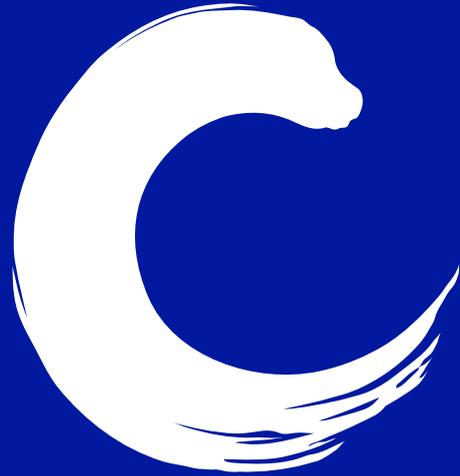
Toronto, Canada / October 15, 2018

CATALYST.ORG/CCH

**CATALYST AWARDS
CONFERENCE AND DINNER**

New York City, United States / March 14, 2019

CATALYST.ORG/CATALYST-AWARD



CATALYST

WORKPLACES THAT WORK FOR WOMEN

Catalyst.org