

Catalyst Guide to Employee Resource Groups

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How to Use This Guide

This guide incorporates multiple approaches to applying the information it provides—and questions it raises—to your Employee Resource Group (ERG). You will be prompted to create or fill in checklists, plot a strategy, and answer probing questions—we have included space for you to write your responses. Some of these tools can be separated out into distinct PDFs based upon your needs (e.g., Plotting Your Communication Strategy, Action Planning and Effectiveness Tracking). Please save and alter these as needed throughout your ERG journey.

EMPLOYEE GROUPINGS

Typically, organizations will start an ERG with one employee group—for example, a women’s ERG or an LGBTQ+ Pride ERG—and then expand into many ERGs following the success of the first. Therefore, ERGs can cover a wide range of employees with identities that may be historically underrepresented in the workplace. Some common employee groups include:

- Women
- Women of Color
- People With Disabilities
- Military Veterans
- LGTBQ+
- Caregivers

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Introduction to ERGs

Well-designed, sustainable Employee Resource Groups (ERGs) play a critical role in creating inclusive cultures at organizations of all kinds. Over the years, our Supporters have demonstrated again and again that ERGs are a popular—and effective—vehicle for the advancement of employees, organizations, and the bottom line. This set of tools provides ERG leaders, Human Resources (HR) experts, and diversity, equity, and inclusion (DEI) practitioners with information on how to get an ERG up and running, as well as how to strategically align an existing ERG with the organization. It also offers advice on the many considerations necessary for ensuring an ERG's long-term success. By working through this toolkit from start to finish, you can develop a comprehensive ERG strategy that meets your organization's needs. Alternatively, you can also complete each section as needed, in the order that works best for you.

KEY CONCEPTS

WHAT ARE EMPLOYEE RESOURCE GROUPS (ERGS)?

ERGs are voluntary, employee-led groups that are formed to act as a resource for both group members and the organization they work for. ERGs can have anywhere from a few members to a few thousand. They are typically based on a demographic (e.g., women), life stage (e.g., Generation Y), or function (e.g., sales), but they may also be based on other identities. They are dedicated to fostering a diverse and inclusive work environment within the context of the organization's mission, values, goals, business practices, and objectives.

ARE ERGS THE SAME AS EMPLOYEE NETWORKS OR AFFINITY GROUPS?

Catalyst uses the term "ERG" to highlight the resource role that such groups play, but not all organizations use the term, and there are a few other popular options to consider:

- **"Employee Network"** emphasizes the goal of employees coming together to increase their professional and social networks to strengthen professional development and business acumen.
- **"Affinity Group"** emphasizes the connection among employees from similar backgrounds who gather to share their experiences.
- **"Employee Council"** and **"Employee Forum"** suggest a group with decision-making and organizing goals.
- **"Business Resource Group"** emphasizes a focus on external marketing and client intelligence.

WHAT IS AN ERG'S ROLE WITHIN AN ORGANIZATION?

ERGs can play many different roles, depending on their objectives and goals for the organization and their membership. ERGs may:

- Work with HR and the DEI Office to develop programs focused on recruitment and leadership development.
- Provide a source of mentors, role models, sponsors, and connections, as well as access to information about career strategies, opportunities, and advancement.
- Showcase and develop the leadership skills and professional expertise of the constituent group.
- Serve as influential and trusted advisors to HR and leadership on workplace issues, opportunities, and solutions.
- Partner with business leaders to develop new products and better understand and serve customers and the community.

WHAT TYPES OF ERGS DO EMPLOYEES FORM?

The most common types of ERG are based on gender, race/ethnicity, and sexual orientation. In the United States, the following five ERGs are core in many organizations: Asian; Black/African-American; Latinx; LGBTQ+; and women. ERGs for women and LGBTQ+ employees are the most common ERGs in global companies because these two demographic groups span national borders. In recent years, ERGs based on age, parental status, and national origin have become popular.¹

How ERGs Benefit Organizations

Depending on the mission, scope, and goals of the ERG, organizations can benefit from ERG programs and activities in many ways.

SUPPORTING DIVERSITY, EQUITY, AND INCLUSION (DEI) STRATEGIES

In many companies and firms, ERGs are a critical element in creating a culture of inclusion and a workplace that supports diversity of background, thought, and perspective. Indeed, ERGs often provide organizational leaders assessing DEI strategies with valuable advice on the issues, opportunities, and challenges related to their constituencies. They supply a constructive forum for feedback on which programs work and which do not. In addition, they can provide organizations with a mechanism for recruiting, retaining, and developing a pool of employees who can support broad organizational goals.

DEVELOPING LEADERS

Many organizations that invest in their ERGs use them as a vehicle for leadership development. They may explicitly ask their ERGs to foster leadership on behalf of the organization, and the ERGs may do so by providing career seminars, skill-building activities, or mentoring programs. As an example, Barilla's "Balance ERG, which focuses on gender and work-life productivity in the United States, created the Balance US Mentoring program for women in 2018. This program teaches participants how to be effective mentors and mentees, identifies areas of leadership development for prospective mentees, and pairs mentors and mentees based on their experience and goals."²

One-half of organizations surveyed by Catalyst said that the primary goal of their ERGs was to provide leadership development opportunities and management experience.³ ERG leaders benefit from opportunities to:

- Develop leadership skills.
- Become visible to organizational leadership, including executive sponsors and DEI councils. (They are often able to make connections with senior leaders and/or clients that would be unattainable in their regular work.)
- Be recognized for their ERG leadership contributions in performance reviews and personal development plans.

ENGAGING EMPLOYEES

ERG programs and activities can help integrate DEI initiatives across all levels and locations. They offer employees community, camaraderie, and connections to the organization, giving them a sense of belonging. ERGs also introduce new and current employees to the organizational culture and help to build and maintain employee engagement and satisfaction.

For many organizations, an ERG is a cornerstone to advancing a cultural change that impacts all employees, not just the constituent group. Some ways that ERGs benefit all employees include:

- Advancing organizational goals for inclusion and increasing awareness and understanding of cultural issues and opportunities.
- Developing a culture of "allies" that encourages people of all backgrounds—not just the constituency group—to attend events, seminars, and workshops.
- Contributing to the organization's success by providing more development opportunities for employees.

Note: Though ERGs bring individuals together to make strides for their constituencies, they should do so in partnership with the organization, as opposed to "against" the company in a retaliatory manner. ERGs are supported by the business, and in turn must support the organization by working to positively effect the changes they would like to see regarding diversity, equity, and inclusion in the workplace.

In addition, ERGs provide their members with professional and personal growth opportunities through access to trainings, seminars, networking events, and other activities. ERGs create an environment for making informal connections and building relationships. They often help members acquire skills that help them better perform their jobs and more effectively manage their careers. Often, ERGs connect similar employees spread across the organization. It is common for Catalyst to hear senior-level women describe the initial women's ERG gathering as the first time they have ever been with so many of their peers. Indeed, Catalyst research shows that employees with strong relationships with peers and supervisors have increased engagement and commitment to their organizations.⁴ ERG members can also benefit from:

- Finding mentors or becoming mentors.
- Showcasing their work and skills to become known within the organization.
- Developing knowledge and skills.
- Gaining product and business development experience.
- Building relationships across business areas and geographies.
- Channeling their voices to advocate for culture change.

DEVELOPING CUSTOMERS AND CLIENTS

Shifts in demographics and purchasing power, the globalization of business, and the trend toward product personalization indicate that the marketplace is changing in unprecedented ways.⁵ To keep up with these changes, many organizations view ERG members as indispensable organizational ambassadors who have valuable information about the needs and experiences of important constituents and markets. ERGs provide insights on burgeoning markets, product development and design, multicultural marketing, and the importance of mirroring the customer and client base.

For example, an LGBTQ+ ERG may conduct focus groups with its members to help inform the marketing department about how to best develop or sell a product to the LGBTQ+ community. In addition, ERGs can host client meetings, connect with targeted consumers, and participate in local professional associations and events to enhance organizational visibility in various markets and develop strategic relationships with customers, clients, and suppliers.

EXPANDING CROSS-CULTURAL AND GLOBAL UNDERSTANDING

ERGs support organizational globalization efforts by enhancing the understanding of cultural differences within a geographic region, between local employees and the corporate culture, and among employees across regions. Practical steps taken by ERGs include lunch-and-learn events, where ERG members share practical strategies to overcome the challenges of working across cultures. In addition, releasing calendars that mark religious and national holidays pertinent to a specific country or region raises awareness of local employees' availability for deadlines, onsite meetings, and conference calls.

Many organizations recognize that different countries have unique employee populations. Therefore, some companies and firms have launched or revitalized regional ERGs to meet local needs. For example, a Canadian or New Zealand organization may have an Aboriginal ERG to support employees with that heritage. In this way, ERG activities are relevant to local members and their communities and at the same time are linked to broader global organizational diversity and business goals. In addition, ERGs in global organizations play an essential role in connecting employees across regions. Kimberly-Clark employed a "freedom within a framework" design, which has enabled their ERGs operating in different regions to meet company inclusion goals by focusing on local issues and challenges—for example, recruitment in rural areas of the USA, high turnover in Malaysia, or the inclusion of women in EMEA/the Middle East.⁶ And at Medtronic, grass roots ERGs called "Hubs" focus on advancing ethnically diverse women in the United States and worldwide by working with local leadership and refining their strategies to align with larger business goals. Hubs then come together at a signature event and connect, celebrate and share successes.⁷

Local chapters of national ERGs also provide visiting senior leaders with the opportunity to meet employees and managers in group settings to discuss business improvement ideas, development opportunities, and challenges associated with integrating corporate policy within the local context. These exchanges provide not only valuable learning opportunities for senior leaders and local staff, but also a chance for emerging talent to gain visibility.

REACHING OUT TO THE COMMUNITY

Many organizations leverage ERGs to link employees to their communities and build reputational capital in the marketplace. This outreach contributes to corporate social responsibility (CSR) and favorably impacts the perception of the employer. ERGs may participate in and/or sponsor events that allow them to give back to the community, forge relationships with community organizations, and meet other professionals. For example, an ERG in a pharmaceutical company could participate in a breast cancer walk, or an ERG at a tech company could provide mentors to local students.

ERG Stages—Where Are You?

Take the questionnaire below to assess your current ERG's stage of development. Once you have identified which stage best reflects your company's ERG, please see the recommended sections to better focus your efforts. In addition, you can talk about this general stage categorization when you speak to experts and other organizations to best position where you are in your ERG journey.

To complete, check "yes," "in progress," or "no" as you think through the following questions.

	YES	IN PROGRESS	NO
<p>1. Do you have any formal or informal employee groups in place now?</p> <p>Affinity Groups</p> <p>ERGs</p> <p>BRGs, etc.</p>			
2. Do you have a clear mission and vision for your ERG?			
3. Do you have a charter in place?			
4. Have you set goals? Short term, longer term, etc.?			
5. Have you identified an overarching ERG strategy that connects your goals to the organization's?			
6. Are there executive champions supporting the groups(s)?			
7. Do you have a dedicated ERG budget?			
8. Have you created a communications strategy and related plans based on audience (i.e., for Executive sponsors and HR/DEI leaders, for ERG members, for organizational leadership, for the organization as a whole?)			
9. Do you have a measurement strategy and tools in place to assess progress, member satisfaction, success, and impact?			
10. Is your ERG currently integrated with your organization's talent management strategy and assessments?			

If you answered...

Mostly "no," You are likely in the early stages of your ERG journey or just embarking on developing an ERG. At this point, [Sections 1](#) and [2](#) of our guide may be most helpful as you learn about ERG fundamentals and make plans to start your work in this area. Be sure to check out examples included in those sections, such as the ERG survey and plotting your communications strategy.

A mix of "yes," "no," and/or "in progress," or mostly "in progress," You may fall into the Established or Intermediate Stage in your ERG journey. At this stage, [Sections 3](#) and [4](#) may be most helpful for you to understand how you can better integrate and advance your current groups and goals, including how to clarify roles, refine your ERG's structure, and work with other constituencies within the organization.

Mostly "yes," You are likely at the Mature/Late stage of your ERG journey. At this point, [Sections 5](#) and [6](#) of the guide may be the most helpful as you think about evolving and possibly expanding your ERG work.

Develop Your ERG Infrastructure

Understanding the Organizational Context

Building a successful employee resource group (ERG) takes a significant amount of thought and time. Laying a solid foundation by carefully determining the ERG's vision, expectations, strategy, and guidelines is essential. It is especially important to develop the ERG strategically within the existing organizational context. For example, organizational structure, business growth, geographic location, and trends should all affect the design of the ERG. Support from within the organization is also critical. An ERG operating in a supportive environment can play an active and visible role in business development and community outreach, and as an advisor to management, Human Resources (HR), and the Diversity, Equity, and Inclusion (DEI) Office. An ERG operating in a less supportive environment will not be able to provide the same benefits to the organization and may need, for example, to plan less visible events rather than large, highly publicized events.

In addition, organizational strengths should be accounted for. If an organization has strong career-development programs that are already available to the ERG constituency, the ERG may do less development training. Instead, ERG leaders may want to supplement the training with mentoring and activities related to career strategy. No matter what, an understanding of the organization's climate will affect the ERG's design and its activities. Many types of information can be useful for positioning and structuring an ERG. To assess the organizational climate, gather data through interviews and discussions with important stakeholders: senior managers, potential members, HR and DEI professionals, and members of other ERGs.

ASK MANAGERS AND EXECUTIVES:

How will they view the ERG? What do they need to know to support it?

What type of support (e.g., advice, product development or marketing, strengthening relationships with customers) do they think the organization needs? How would they like the business to benefit from an organized group of this constituency?

What type of support (e.g., financial, visible, meeting space, official sanction) will they provide the ERG?

ASK COLLEAGUES:

How has the organization developed and advanced employees from the ERG constituency over time?

What critical organizational issues do employees from the ERG constituency face?

What can the ERG do to address those issues?

What is the biggest challenge the ERG will face with respect to the organizational culture?

How will the ERG help its members meet business objectives?

How comfortable would you feel as a member of the ERG?

ASK HR AND DEI REPRESENTATIVES:

Are there other ERGs in place? How have they been received?

Have previous ERGs failed? If so, what went wrong?

Can you share representation data for the ERG constituency by level, by line and staff function, and in development programs?

Can you share attrition data for the ERG constituency and other groups?

Do other organizations in the industry and region have similar ERGs?

Vision and Motivation

Information from these discussions will help clarify answers to the following questions, which seek to define and develop the vision and motivation of an ERG:

What are the objectives of the ERG? How will it assist its members and the organization?

Why develop the ERG? Is it in response to grassroots efforts by employees? An internal assessment? Competitor initiatives? Business opportunities?

Why now? Is it part of a larger diversity initiative? Increased activity of informal groups? Enhanced diversity marketing or global consumer strategies?

What challenges and/or potential objections do you anticipate? What support do you anticipate?

How will the ERG link to and be different from existing D&I initiatives and decision-making groups such as a diversity council?

Who has been consulted about ERG development? Who are the current or prospective champions?

The ERG will...

The ERG will not...

A compelling rationale for the ERG should emerge from the answers to these questions. This can be developed into a concise and persuasive business case that will convince potential stakeholders of the need for the ERG and gain their support. The business case will also guide the development of the ERG's strategic action plan. What types of activities and programs will the ERG develop and how will they benefit the organization and ERG members? What short- and long-term goals will the ERG embrace? How will success for both the ERG and the organization be measured? What is the time frame for achieving the ERG's goals?

Formal Charter

Most well-planned ERGs positioned for success have a formal charter—a comprehensive guide that ERG leaders, HR, the DEI Office, and senior management can use as a reference throughout the life of the ERG. The charter should also contain provisions for future revisions. Companies and firms that are launching ERGs can develop the charter to provide shape and support for new ERGs. Workplaces with informal or weak ERGs may start to revitalize them by adding structures, guidelines, and supports through a charter that is closely aligned with organizational business goals. A charter will contain:

A clear, organization-specific business case that ties the ERG to business goals.

A mission statement.

An organizational structure.

Role definitions and accountabilities for the executive sponsor, ERG leaders, and other organizational stakeholders.

A leadership selection process.

Membership criteria.

Budget and funding procedures.

A strategy or business plan, including areas of focus, goals, lists of actions, and procedures for measuring progress.

A step-by-step process for launching an ERG chapter in a new location. The following sections contain guidelines for developing the formal charter for a new ERG.

Naming the ERG

Names mean a lot. Coming up with a name for a new ERG is an important decision because as soon as people hear about the ERG, they will start talking about it. You can influence the dialogue by developing a name that reflects the ERG's approach and purpose. The ERG's name, together with its mission statement, provides employees with the language they should use when speaking about the ERG. Names are also indispensable to branding the ERG both internally and externally. Ideally, an ERG's name should provide a window into what the ERG does or how it sees itself. Many ERGs use acronyms as names, both because they are catchy, and they can have multiple meanings. The following examples from Barilla, an Italian family-owned company, illustrate the power of a name.⁸

- "Alleanza, in the United States, supports Latinx and Black employees."
- "Together, in Nordic countries, promotes gender diversity and equal opportunities for all."
- "Thisability, in Italy and France, is dedicated to issues related to disabilities."
- "Young, in Italy, recognizes the differences among generations and helps them work together more effectively."
- "Voce, the company's largest ERG, has been instrumental in bringing LGBTQ+ voices to the forefront, including in countries where they are not culturally accepted."

Determining Mission and Goals

Determining a new ERG's mission and goals is of critical importance. ERG leaders should brainstorm potential goals and prioritize them. The top three to five will drive most ERG activities. The mission statement frames how the ERG will reach its goals. It guides the ERG's actions, and it should be the simplest and clearest way to introduce the ERG to diverse audiences. Often, crafting the mission statement is an exercise in clarifying why the ERG exists and how it drives change. A strong mission statement should:

- Make the ERG's business case clear and explicit.
- Use carefully chosen language to describe goals and activities.
- Use terms understood by all.
- Be flexible enough for goals and activities to change over time.
- Encompass all goals and activities.

The following examples illustrate a range of ERG mission statements.

INVESCO (INVESCO | DIVERSITY AND INCLUSION AT INVESCO)

Invesco Rising Career Network (Americas): "The Invesco Rising Career Network aims to develop Invesco's early career employees by providing a network of professional and social support. The network creates opportunities for younger employees to lead, build relationships and advance their careers while fostering communication and collaboration across teams."

EMEA Ethnicity Network (EMEA): "The EMEA Ethnicity Network provides a community for all staff to share their different backgrounds and cultures, and to promote how this positively contributes to the richness of Diversity of Thought and to our commercial success at Invesco."

Neuro Diversity Network (EMEA): "The Neurodiversity Network has been established with the aim of increasing awareness and starting the conversation on how we can make Invesco a more inclusive environment for Neurodiverse individuals. Great Minds Think Differently!"

EMEA Working Families Network (EMEA): "The EMEA Working Families Network aims to support staff throughout this journey. Enabling our colleagues to effectively meet their work and caring responsibilities allows us all to thrive and sustains healthy families."

iAble (Hyderabad): "iAble, an inclusive program for Persons with Disabilities (PwD), was developed to encourage an accessible and welcoming workplace environment for the disabled while creating awareness and greater understanding of the community."

CVS (MAKING CONNECTIONS THROUGH COLLEAGUE RESOURCE GROUPS | CVS HEALTH)

FitClub “embodies the CVS Health purpose of helping people on their path to better health, through group activities—including running, yoga, healthy eating—that help colleagues live a healthier, more active lifestyle.”

Green Team “promotes environmental awareness and sustainability, and makes environmental sustainability a relevant part of every colleague’s role and responsibility through education and volunteer opportunities.”

Outliers “connects analytics professionals, both current and aspiring, within the organization to promote thought diversity and nurture a culture invested in data-driven decision making.”

AMAZON: (EMPLOYEE RESOURCE GROUPS | AMAZON.COM)

The Women in Finance & Global Business Services (FGBS) Initiative (WiFi) “is a global affinity group for Amazon women in FGBS and their advocates to network, partner, and be part of a larger community. WiFi focuses on recruitment, retention, advancement, and allyship, with a vision to make Amazon the Earth’s most sought-after long-term career choice for women working in the areas represented by FGBS. We advance our vision through member events, training, career development, and community engagement.”

Mental Health and Well-Being (MHW) “is Amazon’s newest Affinity Group. The mission is to promote employee well-being and to create a safe community where employees can come together to reduce the stigma of mental health, raise awareness, create a culture of acceptance, and support one another. The group helps employees find resources and connect with teammates, and hosts events featuring Amazon employees along with expert speakers and mental health professionals.”

Amazon’s Black Employee Network’s (BEN) “mission is to recruit, retain, and empower Black employees. BEN connects members with mentors and provides career and personal development workshops. BEN also engages with the local and regional chapters of the National Society of Black Engineers, leads recruiting initiatives with Historically Black Colleges and Universities, and partners with other organizations.”

EATON (INCLUSION RESOURCE GROUPS (EATON.COM)

iConnect “promoting cultural awareness, racial equality, and justice. Our chapters around the world contribute to the attraction, development, and retention of Black, indigenous, African heritage, and other people of color within Eaton’s regions.”

SOAR (Strengthening our Asian Resources): “Asians and allies work together to engage, develop, and grow future leaders at Eaton. By recognizing and valuing everyone’s unique backgrounds, experiences, and ideas, we all can SOAR.”

GROUPON (DIVERSITY GROUPS/ GROUPON.COM)

Pride at Groupon & Allies “Pride@Groupon is dedicated to igniting fierce passion among Groupon employees, consumers, and merchants for LGBTQ+ causes, opportunities, and their intersections across other communities.”

Groupon for Latinos & Allies “G4L exists to expand Groupon’s outreach and workforce diversity by actively engaging with Latinx communities and organizations.”

Blacks in Groupon & Allies “Blacks in Groupon & Allies (B.I.G) exists to celebrate Black influence by developing Black leaders at all levels, diversifying supply of Black merchants, and engaging with Black customers in a culturally relevant way to drive untapped business growth.”

ALLSTATE (EMPLOYEE RESOURCE GROUPS | ALLSTATE INSURANCE COMPANY)

The Intrapreneurs@Allstate (I@A) “vision is to create an inclusive environment where employees with diverse, intrapreneurial thinking and ideas can foster innovation and contribute to Allstate’s business objectives.”

Parents Working Together (PWT) “provides an open forum to share challenges, milestones, and advice about how to balance work and family. We are focused on advocating on behalf of all working parents at Allstate and providing a support system through networking and information sharing. Our vision is to educate, communicate, and leverage resources, to ensure employees will be successful without compromising family life or professional commitment.”

Abilities Beyond Limitations and Expectations (ABLE) “will advance Allstate’s Inclusive Diversity objectives by educating the Allstate community, engaging employees, and promoting the positive impacts of employees with disabilities, caregivers, and allies. Our objectives include increasing awareness of visible and non-apparent disabilities and supporting an environment that actively includes, seeks out, and promotes talent from the disability community.”

The Allstate Veterans Engagement Team and Supporters (AVETS) “purpose is to provide employees, spouses, siblings, and supporters of veterans with a forum to gather with other employees who hold common interests, identities, and/or topics related to veterans.”

Defining Members

Different ERGs have different membership requirements. Defining what membership means should be a priority for an ERG, and it is important to make this decision with membership and impact goals in mind. Increased membership is one way for ERG leaders to gauge success, and making the ERG accessible to employees at different work sites, on different work schedules, and across levels is beneficial if the ERG wants to create a more inclusive workplace. ERGs, by definition, are a resource for employees from a particular group and for an organization. Some ERGs may decide to focus on a specific subsection of the targeted group based on level or function, for example. A group of women in sales or in science is not unusual, nor are groups focused on the development needs of people at a particular career level. In another approach, a broad ERG may act as an umbrella organization for a variety of subgroups. For example, a women's ERG may have a subcommittee focused on promoting women of color. This structure can provide the best opportunity for meeting diverse members' needs.

However, many ERGs open membership to employees who are not from the targeted group. In this way, ERGs welcome allies and supporters as group members. For example, a women's ERG might encourage men to join, or an LGBTQ+ group might be open to straight supporters in the workplace. Inclusive membership allows employees to step beyond their own identities and expand their circle of contacts, influence, and skills. Moreover, open membership broadens the potential audience.

In whatever way membership is defined, it is important to support the diversity of ERG members. For example, a women's ERG should include women of all races, ethnicities, ages, and abilities. ERG leadership should also reflect the diversity of the membership. To achieve this, ERG leaders should actively reach out to members of the ERG constituency who are different from the majority in some way.

ERGs must also consider how to serve members across functions or departments and how to reach field- as well as office-based staff. With growing numbers of remote workers in many organizations, reaching people working from home and other locations is important, too.

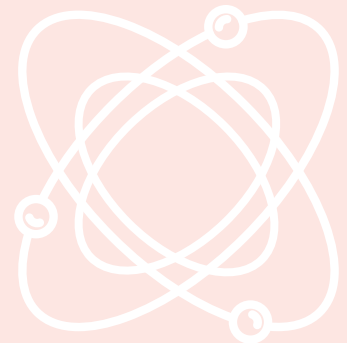
There are advantages and disadvantages to both including a wide range of employees and focusing on a smaller population. Usually, an ERG with an inclusive membership will have more support and be able to reach a wider audience. For example, many women's ERGs decide to include all women in the organization because not doing so reinforces the lack of access the ERG was formed to address.

However, reaching out to a large and diverse group entails significant work. A wide range of activities is necessary, as are strong communications that reach all of the group's sub-constituencies. Maintaining internal systems and membership records is also important. [Page 17](#) details other considerations for inclusive and exclusive membership models.

MEMBERS WITH MULTIPLE, INTERSECTING IDENTITIES

When building or evolving ERGs, it's important to consider that members are not homogenous or monolithic and may wish to be involved with multiple ERGs. This can be especially true for employees with intersecting identities. You may wish to consider the following:

- In what ways could and should your organization's ERGs partner with one another?
- Are there discretionary funds in the budget that can be invested in cross-ERG activities?
- How can individual ERGs use their platforms to promote cross-ERG collaboration, allyship, and advocacy?
- Can multiple ERGs across your organization align on similar goals and accountabilities?



COMPARING INCLUSIVE AND EXCLUSIVE MEMBERSHIP CRITERIA



INCLUSIVE



EXCLUSIVE

ADVANTAGES

Meets the needs of more employees.

Provides more varied programming to meet different needs.

Creates opportunities for diverse employees to convene around a particular topic (e.g., LGBTQ+ employees and their allies).

Defines what is important in group-specific events and activities.

Explicitly defines needs of different levels and functions and how they are related.

Allows for allyship and strengthens a culture of inclusion where everyone helps resolve issues of inequity.

Meets the needs of a specific population.

Focuses easily on diversity within the target group (e.g., an Asian American ERG focuses on immigrant and non-immigrant populations).

Provides safe spaces for employees to have dialogues and share their experiences of the issues they face as part of this identity.

DISADVANTAGES

May lead to unfocused agenda and diluted impact.

May not serve the needs of the target group.

May end up focused on a particular segment of the population, despite the broader membership interest (e.g., a women’s ERG may become dominated by junior women).

Must have a strong rationale for the membership decision.

Must communicate broadly about what the ERG is doing and its value to the organization.

May meet with distrust and/or backlash.

DEMOGRAPHICS TO CONSIDER

Many exclusive ERGs target constituencies based on gender, race, ethnicity, national origin, level, location, and function.

GENDER

Gender is the external, socially constructed rules, roles, behaviors, activities, and attributes that a society imposes on people based on their identity as a woman, man, or other alternative. Traditional gender categories are binary: woman and man; however, not everyone identifies within this binary, and other categories are now accepted at some companies.

Historically, women's ERGs have been exclusive to women. In more recent years, many of them have opened their doors to men, understanding that men face some of the same issues (e.g., managing both work responsibilities and caregiver duties) and that their support is critical to success. However, most ERGs with male members continue to have women-only activities as well.

A shared interest in certain issues is only one piece of the puzzle. Women's ERGs also need a broader base of support: they can't survive without the support of men in the organization. Men can be powerful mentors, sponsors, and supporters to women in ERGs, as well as vocal proponents of their development to other men within the organization. Some women's ERGs simply invite men to activities, and others involve them more fundamentally by including them as members. Inviting men to join harnesses their commitment to championing an inclusive work environment, gives men a voice, and educates them. Catalyst's research on engaging men in diversity initiatives⁹ found that one of the reasons men did not act as champions of women's development and advancement in the workforce was lack of understanding of the issues women face.

RACE, ETHNICITY, AND NATIONAL ORIGIN

Many successful ERGs address business and workplace opportunities through the lens of race, ethnicity, and national origin. Small organizations, however, may not have enough employees of distinct races, ethnicities, or national origins to constitute critical mass. In this case, an umbrella ERG for people of color (US term),¹⁰ visible minorities (Canadian term),¹¹ culturally diverse people (Australian term),¹² or ethnic minorities (UK term)¹³ may be most feasible. This type of ERG can also be successful for global networks for which common terms regarding race/ethnicity are not available.

In addition, even ERGs exclusive to one race or ethnicity, such as Asian Americans, will face challenges in attending to the interests and concerns of members from many different nations and heritages. ERGs can address these challenges by rallying around common issues and using subcommittees to focus on needs specific to specific subgroups.

LEVEL

ERGs often find it challenging to meet the needs of both senior- and junior-level employees. ERGs started by middle- and senior-level employees tend to focus on the issues facing people at those levels. These ERGs can be successful because members are already familiar to senior management and can easily gain its support.

LGBTQ+ TERMS TO KNOW:

Gender Expression How people communicate their gender through appearance, behavior, grooming, and/or dress.

Gender-Fluid A term to describe people who move between two or more gendered identities.

Gender Identity People's inner sense of their gender, which may or may not correspond with the sex they were assigned at birth.

Gender Performance The ways in which people act out their gender identity through behavior, helping to shape and reinforce their desired form of gender expression.

Gender Role Rules assigned by society that define what behaviors, thoughts, feelings, relationships, clothing, occupations, etc., are considered appropriate and inappropriate for people based on their gender.

ERGs with greater junior-level participation can find it harder to secure senior-level support or participation. Nevertheless, mid-level and junior employees gain critical development and networking opportunities through their involvement with ERGs. Senior-level employees may wonder how they can benefit from a group dominated by more junior employees, unless their participation and/or leadership is formally recognized by the organization. But they can use mentoring activities to groom the next generation of talent, extending their influence within the organization and readying themselves for increased leadership opportunities.

Some ERGs tackle this challenge by creating tiered leadership structures that cascade responsibilities, appropriate activities, and level of involvement. For instance, in large organizations:

- Executive-level members can coordinate overall strategy and advocate for the ERG at the top.
- Mid-level managers can oversee regional activities and ensure goals are met.
- High-potential managers can execute at the local level.

This provides employees from each level with opportunities to work with members from higher levels and allows leaders to participate in broader activities in ways that prioritize their time and position appropriately.

LOCATION

Both restricting ERG membership to one location and opening it to employees from multiple locations have logistical implications. The more locations that are included, the more energy the ERG will require. For example, creating activities that address regional needs and ensuring that activities are strategically consistent across locations takes a great deal of coordination and time—and there is also the question of whether events should be in-person, virtual, or a mix of both. Given the mixed way employees can be working (i.e., fully remote work, hybrid working, and those in an office or workplace full-time), thinking through how events and activities should and can be inclusive will take deeper focus. (For more on locations, see note.) On the other hand, leveraging the diversity of various locations is rewarding and best meets business and employee needs.

ERGs can start with a pilot group at one location. Once this group is established, its successes can be shared across new regions in phases. Materials may be developed to guide ERG launches in new locations. As the ERG grows geographically, a leadership infrastructure, from corporate to regional to local, should also be constructed. Technology such as virtual meeting platforms and intranet sites is useful in connecting ERG leaders and members from various locations.

FUNCTION

Many ERGs target employees from a specific function, such as operations or marketing, which allows them to address the opportunities and challenges related to the function. This approach works well in organizations in which employees are naturally grouped by function, often because of the unique culture of the specialty or geographic separation. ERGs focused on one function should consider occasional cross-functional events to extend their members' influence on and knowledge of organization-wide activities. They may also find it useful to reach out to professional organizations specific to their function to build knowledge and enhance their organization's reputation within the field.

A NOTE ABOUT LOCATIONS:

In our post-2020 pandemic world, where work is done has changed significantly. One team may now include fully remote employees, hybrid employees (those in the office for only part of their work week), and employees who work in the office full time, among others. ERGs emerged as even more important for providing connections during a time of working differently due to pandemic restrictions, and showed just how vital these communities can be in times of crisis.

In addition, if your business includes staff who are not working in front of a computer—for example, employees who work in the fields or on a factory or production plant floor—you'll want to think about how to reach and include them. It is critical for ERGs to be mindful of these factors and address them. They must understand their members' needs and preferences and adjust their strategies accordingly.

LEVELS OF PARTICIPATION

Depending on individual interests, needs, and availability, each ERG member will have different goals for participation. Some may wish simply to receive a newsletter; others may like to play a more active role in the group or join the leadership team. Members may ramp their participation up and down over time.

Membership encompasses many levels of participation. Different members may:

- Be on the mailing list.
- Attend events.
- Attend planning meetings.
- Have voting or polling rights.
- Contribute financially to the network through fees or tickets to events.
- Hold leadership positions.

RECRUITING NEW MEMBERS	TIPS FOR BROADENING MEMBERSHIP
<p>Successful ERGs are always recruiting new members. Effective methods for recruiting members include:</p> <ul style="list-style-type: none"> • Send invitations from the CEO, senior leaders, or the ERG itself to ERG launch events. • Hold informational events for employees to “meet the ERG.” • Survey targeted employees to gauge their interest in participation and what activities they would attend. • Communicate about events through newsletters, mass voicemails, emails, and shared calendars. • Distribute feedback forms and sign-up sheets after events. • Launch a campaign based on word of mouth. This technique is especially useful for ERGs for LGBTQ+ employees. 	<ul style="list-style-type: none"> • Spell out the value proposition to employees and to the employer. Why is it worth getting involved? • Reach out to the broad constituency by inviting people to attend events and participate in leadership activities. • Identify the development needs and interests of the constituency and deliver on them. • Ensure that activities reflect the diversity of the constituency. • Routinely consider who participates and who doesn’t. For example, in a pharmaceutical company, do lab scientists attend events? In a women’s network, do participants reflect the full diversity of women in the organization? • Invite senior leaders to events where they can share their experiences. • Consider using ERG events for training credit. • Suggest managers add ERG leadership activities to performance goals. • Introduce ERGs as part of new employee orientation. • Plan activities that will generate positive discussion across the organization. • Send updates about the ERG to the entire organization. • Create toolkits to launch other chapters to reach more employees.

Funding

One of the clearest ways for organizations to demonstrate support for ERGs is to fund them. It is common for ERGs to receive an annual budget from HR or the DEI Office. This funding legitimizes the ERG throughout the organization because it reinforces its importance. Funding does not have to be equal across ERGs, but it should be commensurate with the activities of each group. Annual ERG budgets can vary from \$2,000 to several hundred thousand dollars, depending on the scope of the activities and size of the organization.

Some ERGs receive corporate funds automatically each year. Other ERGs must follow a budgeting process to receive their funds. Usually, these ERGs must submit a business plan that outlines their vision, purpose, and business priorities, as well as their programs and activities. The more specific the business plan, the better. For example, the plan should include a list of proposed events with descriptions, costs, and benefits. Other ERGs must request funds for events individually, which sometimes leads to greater overall funding. ERGs with the largest budgets typically receive financial support from line business units.

Part of an executive sponsor's role should include some plan or direct work to secure funds for the ERG that they are sponsoring. This not only shows advocacy for the group and helps its efforts, but also communicates to the executive-level leadership the value of the ERG as an important place in which to invest in their employees.

However, corporate funding is not always possible, and it will certainly depend on the business cycle and larger economic context. In economically challenging times, it is important for ERGs to be wise business partners and to think about ways to save money.

When ERGs are not able to obtain funding from the organization, they may choose to charge their members annual dues. Some ERGs believe that this results in a more committed membership. Another option is to charge non-members who attend ERG events, such as conferences and speaker series. In rare cases, ERGs can gain access to outside funding through professional associations or local groups.

Communications

To introduce and describe an ERG to its organization, a comprehensive communications strategy is necessary. Communications strategies have clear objectives and messages, target a range of audiences, use a variety of verbal and written tools, and are designed to occur over time. ERGs with a communications strategy in place are in a strong position to communicate their goals, progress, and successes.

OBJECTIVES

What are the goals of the communications?

AUDIENCES

Who are the intended recipients?

MESSAGES

What is the core message for each communication?

TOOLS

What communications methods and venues will be used?

TIMING

What is the schedule of communications?

Successful communication often adheres to the following guidelines:

- Communicate frequently and through several methods. Repeated communication is critical to an initiative’s success. Use a range of systems, including social networking tools.
- Emphasize the business case and value proposition for the organization.
- Answer the question, “What’s in it for me?” for employees within and outside of the target group, for executives, managers, HR, and employees at various levels and functional areas.
- Choose the right communicators, including unexpected supporters. Different communications vehicles require different communicators. Consider the audience and level of discussion. Leverage a range of communicators and choose communicators who make the most sense for their intended audience.
- Leverage existing business events and communications vehicles. Communication about ERGs should be included in discussions of recruitment, employee value proposition, and community service activities—not only in communications that are focused on the ERG.
- Shine light on and debunk myths. Address preconceptions head-on through formal and informal means.
- Showcase role models and their stories.
- Respond to employee questions about the ERG and highlight results and opportunities the ERG provides.

LINES OF COMMUNICATION



Events and activities

Events open to all staff.

Informational events for employees to “meet the ERG.”

Events or programs co-sponsored with other ERGs.

Philanthropic and volunteer activities with ERG involvement.

Informal town hall meetings.

Cross-ERG information-sharing events and activities.



Verbal communications

Formal speeches.

Webinars.

Videos and podcasts.

Town meetings.

Small group presentations and discussions.

LinkedIn Live streams.

Word of mouth: ERG members can share and discuss one-on-one with other employees.



Written communications

Emails and internal newsletters.

PowerPoint decks available for review and reuse.

Intranet page for the ERG.

Organizational website.

Public notices/postings.

Annual progress reports.

Press releases.

Brochures and flyers.

Social media such as Twitter, Facebook, LinkedIn, and Instagram.

Internal chat apps such as Slack and Teams.

Projects in work management apps, e.g., Asana, Monday.com, Trello, and Jira.

COMMUNICATING WITH ERG MEMBERS

Regular ERG communications should let members know about meetings, events, and new activities and developments. Questions about how best to communicate with members can be included in an ERG member survey to help align with their needs. In addition, ERG leaders should communicate basic information about how the ERG works, its structure, and membership requirements.

Communication goes two ways, and it is important to create systems for formally soliciting feedback from members to keep in touch with their interests, needs, and ideas. Feedback from inactive members is also useful. Methods for obtaining feedback include:

- Annual or biannual surveys.
- Feedback cards for individual events.
- Conversations with individual members.
- Periodic member focus groups or interviews.
- Open discussions at ERG meetings.
- Year-end review sessions.
- Exit interviews.

Like many working groups, ERGs can spend a lot of time doing and not much time pausing and congratulating. Highlighting the ERG's accomplishments can reinvigorate members and reinforce the vision. It is also meaningful to recognize or reward the success of individuals or regional chapters. Some ERGs do this at a formal event such as a luncheon, conference, or dinner where they celebrate the year's achievements. Other ERGs highlight successes at meetings, in newsletters, or through other forms of communication.

COMMUNICATING WITH POTENTIAL STAKEHOLDERS

EFFECTIVE APPROACHES FOR COMMUNICATING WITH....

HR AND THE DEI OFFICE

Because many ERGs' goals and activities dovetail with those of HR and the DEI Office, good communication with those offices is important. Tips for this type of interaction include:

- Discuss annual plans with the appropriate offices and coordinate activities.
- Advise HR and D&I representatives about workplace strengths, issues, and opportunities as seen from the vantage point of ERG members.
- Serve as a trusted sounding board for HR and DEI concerns and program ideas.
- Review ERG progress and impact with HR and DEI representatives, and gain their feedback and input.

SENIOR LEADERS

ERGs can serve as business partners, and communication is fundamental to effective partnering. Communication with senior leaders includes:

- Update senior leaders on the ERG's role and contributions to the business, perhaps by annual or semiannual report.
- Discuss business issues and opportunities and how the ERG can help address them.
- Create opportunities for ERG members to meet with senior leaders to discuss business topics.
- Create opportunities for meetings with clients from the target population.
- Provide talking points about the ERG and related topics that will be helpful to senior leaders.
- Develop mentoring relationships.

Launch Your ERG

Developing a new ERG may seem like a daunting task. But once a plan of action, with specific tasks, expectations, and timelines, is created, the process will be more manageable.

Official launches of ERGs can happen through many different events, both virtual and in-person. An ERG can start with a local pilot group before it is rolled out to other locations. Grassroots connections can be formalized either within or across locations. Or a launch can occur through a global leadership summit that charges its attendees to start ERGs at the local level.

In the past, most ERGs were started by a group of employees who came up with a plan for a new ERG and ultimately secured organizational support and sponsorship. However, it has become more common for HR or the DEI Office to develop an overall strategy for ERGs, including the business case, mission, and guidelines. Then, the organization either starts the ERGs or invites groups of employees to apply for ERG status. In this scenario, the employer constructs the framework for the ERGs before they are launched.

The guide below will help employees and employers think strategically about launching an ERG and ensuring its long-term success. It is important to plan the ERG as a business resource that has leadership support, tracks success, and builds momentum and interest.

The items in steps one and two are necessary for the establishment of the ERG and should take three to six months to complete. Step three is the launch of the new ERG, and steps four and five describe actions that will ensure the success of the ERG over the short and long term.

STEP 1

GAUGE INTEREST, ESTABLISH A BUSINESS CASE, AND SET DIRECTION.

- Pinpoint a location that has the greatest executive support to launch an ERG initiative.
- Identify the core group of ERG leaders. They should reflect various dimensions of targeted membership.
- Articulate a clear, company-specific business case that ties the ERG to business goals; consider focusing on both internal and external (e.g., clients or customers) goal
- Create a mission statement. Define what the ERG is and what it is not. The organization may create an overarching mission statement for all ERGs that can be further defined by individual ERGs. The organization may also create guidelines that include information about sponsorship, activities, budget, accountability, and cross-ERG relationships.
- Create the ERG strategy, including initial areas of focus, goals, and actions.
- Create an organizational structure that makes efficient use of the time and resources of the membership and that considers the number of locations where the ERG will operate and the relationship between locations.
- Determine membership criteria (gender, level, function, location).
- Seek management support and involvement as appropriate, including a budget or procedures to obtain a budget.
- Design strategies to develop support at each location.
- Use the business case to establish support from organizational leaders and champions.
- Explore interest through word of mouth among potential ERG members.

STEP 2

IDENTIFY GOALS FOR THE ERG, DEVELOP LEADERSHIP STRUCTURE AND SUPPORT.

- Survey potential members' interests and needs with Sample Questionnaire on [page 29](#).
- Create the ERG strategy, including initial areas of focus, goals, and actions.
- Identify the core group of ERG leaders. They should reflect various dimensions of targeted membership.
- Explore interest among potential ERG members through word of mouth.
- Create an organizational structure that uses the time and resources of the membership efficiently, and that considers the number of locations where the ERG will operate and the relationship between locations.
- Design mechanisms for continuous feedback from members and sponsors on ERG goals and activities.
- Recommend that ERG leadership and participation are a part of the employee's goals, so that they are recognized as a business contribution.
- Design strategies to develop support at each location.
- Solidify all decisions and development plans.
- Create and distribute a user-friendly guide with information about the ERG to interested parties at different locations.

STEP 3

LAUNCH ERG (1-6 MONTHS)

- Actively recruit diverse members; be clear about the mission and the value of the ERG to employees and the employer.
- Encourage various levels of participation.
- Hold a launch event linked to the ERG's mission and goals.
- Publicize the launch event and its purpose.
- Create effective ERG processes for meetings and government.
- Invite a broad audience—beyond membership—to ERG events.
- Partner with HR, the DEI Office, and other ERGs; align activities with other business initiatives.
- See more in the "[Launch Event and Announcement](#)" section of the toolkit below.

STEP 4

MANAGE ERG FOR MAXIMUM BENEFIT TO MEMBERS AND COMPANY (6-12 MONTHS)

- Develop strategies to build membership and encourage members to take on leadership roles.
- Design orientation activities for new members.
- Incorporate needs of members into ERG goals and activities.
- Develop mechanisms to evaluate the impact of the ERG and member satisfaction.
- Develop celebrations for individual and group achievements.
- Refine strategy and develop a one- to three-year plan of activities.

STEP 5

FOCUS ON SUSTAINABILITY AND TRACK IMPACT (6-12 MONTHS)

- Assess whether the ERG is meeting goals. Evaluate ERG strengths and weaknesses. Consider the following questions:
 - Is the ERG a resource to the organization?
 - Is the ERG a resource to employees?
 - What is the ERG’s reputation?
 - Does the ERG appeal to all segments of the intended population?
- Refine plans to maximize effectiveness.
- Make sure that all employees understand the goals and value of the ERG.
- Acquire reasonable resources that are aligned with the ERG’s mission.
- Keep clear and readily accessible records of ERG activities and participation.
- Create leadership succession plans.
- Assess the extent to which ERG leadership and participation are recognized as a business contribution.
- Stay connected with partners inside and outside the organization.
- Ensure member contributions are reflected in organizational performance reviews and succession planning.
- Share knowledge and best practices with other offices and regions.
- Share best practices with ERGs from other organizations.
- Share the ERG’s accomplishments; gain recognition.

Launch Event and Announcement of the Strategic Plan

Once the groundwork is laid, the ERG should be publicly announced with a launch event. Many ERGs host senior leaders from the ERG's constituency who share their experiences, both at the organization and with prior employers. This format tends to draw a substantial audience because members can learn a lot from the challenges and triumphs of organization leaders. Another option is to invite speakers from other organizations with successful ERGs. Or invite a speaker to discuss a topic that a large audience will find interesting.

Which activity will be most effective depends on who is invited, and how many people receive an invitation. In addition, the presence of the executive sponsor, as well as other senior leaders, even the CEO, will give the ERG credibility. Finally, it is critical to provide participants with time for networking and social interaction, opportunities to meet with senior leaders, and a way to submit feedback. Ideally, the event should leave attendees with a clear sense of the following points:

- What the ERG's vision and strategic plan is.
- What the ERG is and is not.
- What the ERG expects to accomplish in its first three years and how.
- Who the executive sponsor and ERG leaders are.
- The organization's and senior management's commitment to the ERG's success.
- How the ERG will support other DEI or human capital initiatives.
- How employees can participate in or support the ERG.
- Who employees should contact for more information.
- What ERGs in other organizations have accomplished.

The launch event is often the greatest opportunity the ERG has to introduce potential members and supporters to its vision and to gauge their interest in future participation. Distribute a survey to attendees to ensure that subsequent activities will be relevant to the membership base. A survey is a quick and easy way to give ERG leaders a better idea of the level of interest and time commitment people are willing to make. The survey will also give ERG leaders a notion of how ambitious the schedule of ERG activities should be in the planning phase. Be sure to ask some open-ended questions, so that potential members can elaborate on their interests and ideas.



ERG Questionnaire

[ORGANIZATION] has launched a [TYPE OF Employee Resource Group (ERG)]. The ERG's mission is to [ADD MISSION]. The ERG is driven by its members; to be effective, it needs to identify potential members and their needs.

This survey is the first step toward making this ERG what you want it to be. Your responses will be reviewed by the ERG organizers, and the aggregated results will be reported on [DATE] [during an ERG meeting, in a newsletter, etc.]. Please complete this survey no later than [DATE], and return it to [ADDRESS].

1. What are the three most important things you want to gain from participation in this ERG?
2. Think about how you want the ERG to help the organization meet its business objectives, and complete the following sentence:
The ERG will...
3. Think about the one thing you think the ERG should *not* be involved in, and complete the following sentence:
The ERG will not...

4. How interested are you in the following?

	Very interested	Interested	No Opinion	Somewhat Interested	Not Interested
Career advancement					
Networking					
Mentoring					
Leadership development					
Work-life integration					
Self-improvement					
Product development and design					
Expanding client relationships					
Community outreach					
Continuing education					
Other:					

5. What types of activities are you interested in? (Please check all that apply.)

Client networking opportunities	Newsletter	Skill-building seminars/workshops
Community programs	Other (please specify)	Social events
Directory of ERG members	Product development and design workshops	Speakers/Panels
Mentoring programs	Recruiting	Surveys
Networking events	Relationship-building with clients	Virtual events



6. Realistically, how much time can you devote to the ERG each month?

Less than 1 hour per month

4-8 hours per month

1-3 hours per month

More than 8 hours per month

7. At what times during the day would you prefer activities to be held? (Please check all that apply.)

Breakfast: 7:30-9:00 a.m.

Early evening: 5:00-7:00 p.m.

Lunch: 11:30-1:00 p.m.

Late evening: 7:00-9:00 p.m.

Afternoon: 2:00-4:00 p.m.

8. Are you interested in taking a leadership role within the ERG, such as serving on a committee?

Yes No

9. Please use the space below to share other information or suggestions you think would be of interest to the ERG.

10. Your information: (optional)

NAME

TITLE

DIVISION

FUNCTION

OFFICE/REGION

PHONE

EMAIL

Thank you for your time and input. We look forward to partnering with you to create a more inclusive workplace at [organization name].

Establish ERG Governance

Developing a Leadership Team

Identifying a strong employee resource group (ERG) leadership team and governance structure is vital to success. Often, ERG leaders emerge naturally. However, there are many times when a leader must be chosen. When an organization has decided to launch an ERG as part of a broader diversity, equity, and inclusion (DEI) or business initiative, high-potential employees are often identified as ERG leaders by the executive sponsor or Human Resources (HR)/DEI leader to recognize their talent and provide leadership development opportunities. In other cases, a nomination and selection process among eligible ERG members is implemented.

No matter what, leaders should represent the diversity of ERG members and have the interest and energy to devote themselves to the issues.

ERG leaders should possess the following qualities:

- A history of contributing to the organization.
- Credibility with senior management.
- A passion for the ERG's mission and goals.
- Strong facilitation skills.
- Team-building skills.
- Delegating skills.
- Flexibility.
- Strong interpersonal skills.
- Communication skills.
- The ability to connect with employees from a variety of backgrounds.

ERG leaders have a wide range of tasks in the formation and launch of an ERG. For example, they must:

- Coordinate member activities.
- Secure the participation of new members.
- Maintain the ERG's momentum among members and within the organization.
- Ensure the ERG's planned activities support its mission, goals, and objectives.
- Ensure that the ERG's activities are aligned with organizational business objectives and priorities.
- Partner with the ERG's executive sponsor.
- Keep HR, the DEI Office, and senior management informed of the ERG's work.
- Act as a spokesperson for the ERG within the organization and externally.
- Serve as trusted advisors to leadership on both workplace and business issues.
- Act as role models for ERG members.

CORPORATE ROLES

Successful ERGs are often ones that are officially recognized, supported, and overseen by the organization. Recognition and support typically entail formal corporate roles and responsibilities. An oversight body that can be led by senior staff, the CEO, HR, or Chief Diversity Officer, among others, holds the ERG accountable for its activities. Below are some examples of corporate roles.

THE EXECUTIVE SPONSOR

The most effective ERGs are sponsored by executives who champion the ERG and ensure strategic alignment with business objectives and diversity initiatives. An executive sponsor is a vital part of the ERG's leadership structure. This person is a senior-level executive, preferably a member of the highest level in a line organization, who demonstrates visible and vocal support to the ERG by attending leadership meetings and events. The sponsor ensures the ERG's alignment with the organization's goals, and champions its mission wherever appropriate.

The executive sponsor has personal and professional credibility among senior management, a flexible attitude, and an interest in learning. He or she is politically astute and has a proven ability to challenge organizational barriers. The executive sponsor is an engaging champion because he or she is excited about the issues and can spread that excitement to others. The sponsor does not have to come from the ERG's constituency, and, in fact, some employers purposely choose sponsors from other demographic groups.

THE EXECUTIVE SPONSOR:

Works with ERG leaders to:

- Help develop the ERG's strategic plan by providing insight.
- Act as sounding board for new policy design.
- Commit to participating in specific activities to support the ERG.

Interacts with organizational senior leaders to:

- Address any resistance to the ERG, especially at senior levels.
- Act as a liaison between the ERG and HR/ DEI leaders.
- Link the ERG to other relevant initiatives and/or organizational taskforces.
- Demonstrate how the ERG can and will make business contributions.
- Remind leaders that the ERG is a resource they can tap.

Publicly supports the ERG by:

- Interacting with influential managers and opinion leaders throughout the organization to inform them of the ERG's mission and business objectives.
- Publicizing ERG activities and achievements through executive-level presentations, memos, internal and external speaking engagements, and other events.
- Dealing immediately with any resistance or retaliation against the ERG.
- Participating as a speaker or panelist at ERG events.
- Sponsoring ERG activities through attendance and/or financial support.
- Supporting the ERG's mission within their networks by sharing the business case, describing ERG activities, and encouraging others to support and participate in the ERG.

OTHER CORPORATE ROLES

TITLE	DUTIES
DIVERSITY, EQUITY, & INCLUSION OFFICE	<p>Coaches ERG leaders.</p> <p>Provides internal and external resources and support.</p> <p>Facilitates connections and ensures alignment with other ERGs, DEI efforts, and HR initiatives.</p> <p>Helps capture and report ERG progress to the organization.</p>
HUMAN RESOURCES	<p>Keeps track of ERG activities and progress.</p> <p>Helps incorporate ERG feedback into organizational policies and practices as appropriate.</p> <p>Participates selectively in ERG events.</p>

ERG OFFICERS

Usually, a core group of ERG leaders—the ERG’s officers—works with HR, the DEI Office, the executive sponsor, and senior leaders to define a business case and set the ERG’s direction. The officers determine the ERG’s goals and activities, and they are responsible for accomplishing them. A typical core group has a President, Vice President, Secretary, and Treasurer.

TITLE	DUTIES
PRESIDENT	<ul style="list-style-type: none"> Main contact for the ERG. Main contact with ERG sponsors. Works closely with HR and the DEI Office. Works with the vice president to organize events. Mentors program coordinator (see Table 3).
VICE PRESIDENT	<ul style="list-style-type: none"> Serves as back-up to the president. Organizes ERG events. Coordinates community service activities. Mentors assistant program coordinator (see Table 3).
SECRETARY	<ul style="list-style-type: none"> Main contact for public relations. Coordinates ERG registration. Maintains ERG membership list. Acts as official recorder. Coordinates elections.
TREASURER	<ul style="list-style-type: none"> Develops and maintains budget. Coordinates fundraising activities. Works with local coordinators to allocate funds.

NON-OFFICER ERG POSITIONS

Non-officer ERG positions are often filled by volunteers, as opposed to elected by membership or selected by leadership. The volunteers ensure that ERG operations are carried out.

TITLE	DUTIES
WEBSITE COORDINATOR	<p>Develops and maintains the ERG intranet page or website.</p> <p>Maintains ERG distribution list/email database.</p>
LOCAL COORDINATOR	<p>Promotes awareness of the ERG at the local physical site.</p> <p>Works with treasurer to develop local budget.</p> <p>Plans activities at the location.</p> <p>Maintains communication between the local site and ERG officers.</p>
PROGRAM COORDINATOR	<p>Works with president to develop and implement programs and events.</p> <p>Researches potential issues relevant to members.</p> <p>Works with local coordinators to ensure events have enough staff and participants.</p>
ASSISTANT PROGRAM COORDINATOR	<p>Supports program coordinator to organize programs and events.</p> <p>Oversees program and event administration, coordinates invitations, tracks attendance, manages event registration, and coordinates follow-up.</p> <p>Documents each program and event with minutes, materials, and/or photos.</p>
COMMUNICATIONS COORDINATOR	<p>Coordinates with corporate communications and the ERG to ensure that objectives, activities, successes, and progress are reported to the entire organization.</p> <p>Coordinates with ERG leadership, organizational leadership, and HR/DEI officers on external communications about ERG activities and achievements.</p> <p>Assists program coordinator with outreach to ERG membership as needed..</p>
ALLY	<p>Someone who does not identify as part of the ERG identity group who wants to learn about and support the ERG constituency's opportunities and perspectives.</p> <p>Attends specific meetings focused on what allies can do to better act on the constituency's behalf in support of positive change.</p> <p>Communicates with other parts of the organization about their learnings and the value of the ERG.</p> <p>Acts as a thought partner for the ERG to surface additional ways of making an impact in the broader employee population.</p> <p>Engages in other supportive roles as they arise.</p>

ERG Structure

The structure of an ERG's governance depends on many variables, including the number of members, geographic locations, and functional areas; the ERG's goals; the existence of a cross-network governing body (e.g., DEI Office); and relationships with other ERGs. There is no right or wrong way to structure the leadership team.

Below are five examples of ERG leadership titles and structures.



DISPERSED LOCATIONS

ERGs with chapters in dispersed locations that need to represent many different businesses, locations, and/or functions.

Elected officers

- 12-member board of directors

Non-elected officers

- Field champions (local coordinators)
- Committees



LOCAL CHAPTERS

ERGs that have several local chapters that operate fairly autonomously within a single country.

National board

- Two national co-chairs
- National secretary
- National treasurer

Local boards

- Two co-chairs
- Local secretary
- Local treasurer
- Activity volunteers



DEADLINE-DRIVEN

An ERG in an organization that is deadline-driven, and whose elected officials need to ensure precise coordination.

Elected officers

- President
- Executive assistant
- Executive vice presidents
 - Operations
 - Finance
 - Marketing and strategy
 - Information and systems
- Committees



CONSENSUS-DRIVEN

ERGs in a consensus-driven organization, where sharing work and responsibilities is necessary to maintain momentum. Many firms would meet these criteria.

Elected officers

Nine-member steering committee

Includes president and vice president

Committees

Each has two co-chairs



ESTABLISHED AND CONNECTED

A well-established and developed ERG that sustains momentum by building on past experience, organizational input, and other ERGs.

Officers

- Two co-chairs
- Past chair
- Two advisors

Committees

Ten-member advisory board

- Past chairs
- Organizational VPs from ERG's demographic group

Succession Planning

Leading an ERG can be exhilarating and exhausting. Because of this, it's important to create a succession plan that defines the terms of office and election process from the outset. Leadership succession is critical to sustaining the ERG and keeping the ERG and its leaders energized. It can be strange to think about replacing leaders who have just started their terms, but ERGs that avoid succession planning risk that their leaders will experience burnout.

Besides defining term lengths, it is also helpful to build a process in which experienced outgoing leaders can overlap with new leaders by acting as advisors. This will prevent burnout and help to ensure a steady stream of willing and able leadership talent.

Whether the ERG has a single leader, a pair of co-leaders, or a triumvirate at the top, the next generation of leaders should be developed early. Look for members who have taken smaller roles in heading up committees or organizing events. Speak with them about their interests and encourage them to take on more visible roles within the ERG.

TERMS OF OFFICE

Having a core group of initiators who run the ERG for its first few years is invaluable. This consistency in leadership helps build a strong base of support and systems. However, it is equally critical to pass leadership to a new group. Consider two-year term limits. Overlap newly elected leaders with more experienced leaders to ensure continuity and the sharing of information.

SUCCESSION PLANNING—QUESTIONS TO CONSIDER

- Do you have a process for replacing an ERG leader who leaves unexpectedly? Should you have back-ups for each officer role, or co-chairs for those leader roles?
- What should the knowledge transfer/shadowing/transition period be? Six months overlap with the former leader, to help the new leader get up to speed?
- What else can you do to set up new ERG leadership to be successful? Connect them to important networks? Share the history of the ERG?

Election Process

Elections themselves are straightforward administrative processes. It is important to plan your election process to follow your organization's business cycle, ensuring strategic alignment.

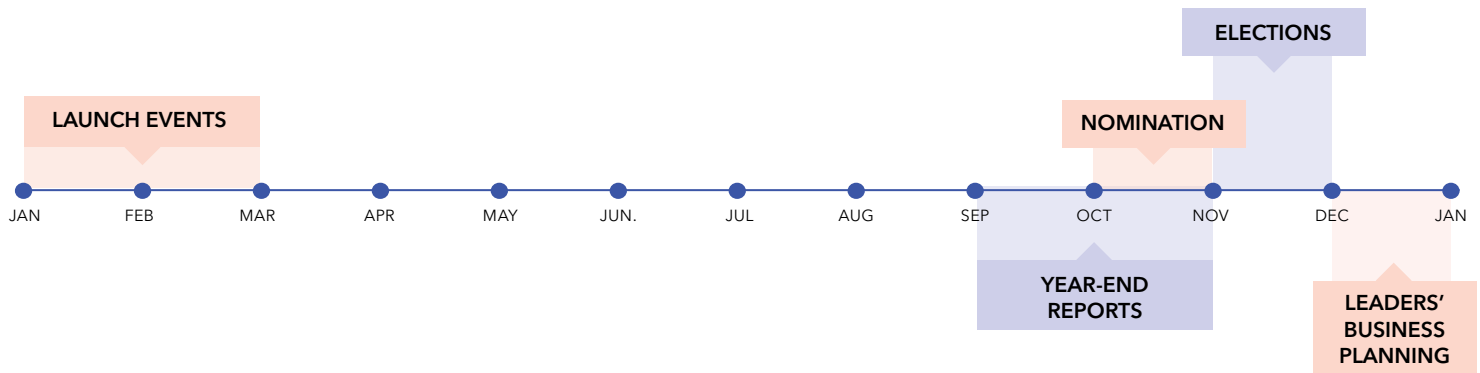
For smaller ERGs, there may not be a formal election at all. If all the membership can fit in one room and find the time to do so, it is enough to meet and talk over the question of next year's leadership. Members can volunteer, and depending on how many spots are available, they can decide on the new leader at that very meeting. In this situation, however, it is important to monitor the ERG's size and recognize when it has grown too large for the informal process.

Larger ERGs often use a formal election process with nominations, summaries of each candidate's qualifications sent out by paper or electronically, and votes taken on a set date. Another alternative is for HR or corporate leadership to appoint leaders. In this way, ERG leadership positions can be used strategically by the organization to place high-potential employees into positions with high visibility.

Some members may need encouragement to take on leadership positions. Likewise, long-term leaders may need encouragement to let go. Someone who has created an ERG and seen it through its infancy can find it difficult to pass on the leadership mantle. While this situation can be problematic, it is necessary to address it. Once entrenched leaders step down, continue to involve them, perhaps as advisors. They have a wealth of knowledge that future leaders will want to access.

ERG Leadership and the Annual Business Cycle

ERGs with strong business-aligned strategic plans are likely to coordinate their administrative procedures with the organization's annual business cycle. For instance, the nomination and selection process for new ERG leaders may occur during the performance review and high-potential identification process, allowing candidates to be nominated by managers who are interested in developing their employees through ERG leadership roles. Likewise, the ERG's strategic plan may be formed after the organization announces its annual business plan, ensuring strategic alignment. A sample annual timeline based on the calendar year may look like the following:



ERG Leadership Development and Accountability

Assigning pipeline talent to ERG leadership roles is a creative way to provide high-visibility assignments. Holding ERG leaders accountable for the initiative's success ensures that they follow through on goals. The annual business cycle provides a framework that helps developing leaders understand the major decisions and activities that mark the organization's fiscal year. As is discussed in [Section 6](#), metrics based on participation in the ERG, event and program effectiveness, involvement with business activities, and overall impact are set to gauge the success of the ERG's strategy at the beginning of each year. To adequately support this, ERG participation and roles need to be written into the employees' job responsibilities, including outlining objectives and key results (OKRs). In addition, official time and space for employees to work on these responsibilities must be taken into account when planning business goals and setting individual OKRs for ERG members and leaders at the beginning of each year as part of the talent management process.

Ideally, ERG leadership reports quarterly or semiannually to the executive sponsor or monitoring body to ensure that the ERG is on track to meet its annual goals. This monitoring keeps the ERG leadership accountable for staying on track with the commitments made at the beginning of the year. Once ERG goals are met, awards, celebration events, and other recognitions of performance can reward and highlight the effectiveness of the leaders involved.

Build Support and Work With Other Groups

Organizational Support and Collaboration

Forming connections with other areas of the organization ensures support for the employee resource group's (ERG's) mission and activities from several quarters. Other ERGs, the Diversity, Equity, and Inclusion (DEI) Office, Human Resources (HR), talent management practitioners, as well as organizational senior and middle managers, will have a stake in ERG activities because of the potential overlap in efforts to engage the employee base. To be successful, the ERG should demonstrate how its activities augment those of other initiatives, and the ERG's charter, strategic plan, and annual calendar should reflect the importance of relationships with all these groups.

When reaching out to these audiences, the ERG should highlight the ways it can benefit the different parts of the organization. A concise strategic plan of action, detailing goals, accountabilities, and expected outcomes for three to four areas of focus, will help manage expectations and prioritize ERG members' time and energy. Once the strategic plan is determined, the ERG's communications team should share it with each audience, addressing its specific concerns.

ERGs and HR and/or the DEI Office

The relationship between the ERG and HR and/or the DEI Office has the potential to be strong and collaborative. The coordinating office can play a significant role in starting an ERG and supporting its goals and mission.

When working with HR and/or DEI representatives, ERG leaders should highlight the benefits of a partnership. For example, joint efforts may utilize the advice of the ERG constituency to garner new support from management for long-term HR/DEI goals. Other strategies that may be useful include:

- **Clarifying roles.** The collaboration between an ERG and HR/DEI Office is enhanced when roles are clarified at the outset and then revised over time. For ERGs with a stated mission of acting as an advisory body, articulating how the ERG's strategy and goals relate to HR and DEI goals can be useful in defining roles. Be clear about where the ERG's role of identifying issues and solutions ends and where HR's implementation role begins.
- **Determining responsibilities and accountability.** Decide together which current and planned activities HR is responsible for, and which the ERG will manage. The ERG should support HR/DEI activities, not reinvent the wheel or duplicate services. Sometimes this will mean foregoing certain activities, such as a coaching or mentoring initiatives, because they belong to the HR function. In addition, determine accountability for goals. Who is responsible for which training and development activities? Who defines what the ERG is responsible for? For example, usually, a women's ERG plays a role in the advancement of women, but it should not be held accountable for women's advancement; senior leadership and managers should be held accountable.
- **Meeting on a regular basis with HR/DEI representatives.** Inform HR of the ERG's mission, how its activities will fulfill the mission, and the impact of those activities. Quarterly or semiannual meetings with HR leadership provide ERG leaders an opportunity to seek advice and guidance on managing and positioning the ERG locally.
- **Including HR/DEI staff on ERG committees.** If meeting with HR every few months isn't enough, the ERG may want to invite HR staff to participate as formal members of various committees.
- **Participating in HR/DEI initiatives to share information.** The ERG should fully participate in any DEI councils, annual events, or cross- ERG leadership caucuses convened by HR to share internal best practices and initiative updates.

ERG Roles Within the Organization

ERGs generally have three distinct roles when they work with HR, the DEI Office, and organizational leaders: programming, advisory, and business partnership.

Programming and Events	Advising Management and HR	Business Partner and Development
Networking and mentoring.	Policy and practices reviews and advisement.	Client- and customer-focused events.
Recruitment and retention.	Succession planning and talent identification.	Product and service reviews and advisement.
Career and professional development.	Information flow to and from employees.	Supplier diversity connections.
Leadership development and sponsorship.	Evaluating and improving workplace culture.	Market reach and expansion.
High-visibility events.	Employee engagement.	Enhancing brand reputation.
DEI awareness and education.		Business partnerships.

Other ERGs and ERG Umbrella Organizations

An organization with many ERGs should consider creating an umbrella council to encourage leaders and members of the ERGs to meet and share information. This is common practice, and most ERGs collaborate with other ERGs at their organizations. In some organizations, HR or the DEI office develop a cross-ERG structure. For example, a representative or two from each ERG may sit on a global or national diversity council. This structure allows ERG leaders to become more integrated in their approaches and activities and can increase their collective impact on the organization.

There are several ways ERGs can work together to achieve mutual goals and enhance effectiveness. ERG leaders may meet monthly or quarterly to share insights and best practices and to uncover common issues or challenges. However, it can be difficult to agree on how to prioritize issues across multiple groups. The goal should be to identify commonalities while still voicing unique issues.

Ideally, ERGs are resources for one another. For example, an ERG for women is often the first to be started at an organization. The women's ERG can then be a resource to other ERGs as they form. The leaders of the women's ERG make this happen by meeting with the organizers of new ERGs to share their history, ideas about structure and strategies, and lessons learned.

ERG leaders in organizations that have not created a cross-ERG structure should realize that building partnerships takes time, and it is helpful to start with smaller projects. Once relationships are established, the ERG can start to pursue more complex collaborations with other ERGs. For example, ING US Financial Services' five business-aligned networks—African-American Network, Asian American Network, Gay and Lesbian (GALA) Network, Latino Network, and Women's Network—work together to sponsor the Diversity Symposium. This network event is held annually so members can exchange ideas, showcase best practices, address challenges and concerns, and identify opportunities for collaboration.¹⁴

ERGs can collaborate in many ways, including:

- Promoting and attending one another's events.
- Conducting joint open houses to recruit new members and share progress with the organization.
- Sponsoring events together (e.g., external speakers, brown bag lunches, ERG celebrations).
- Hosting an annual diversity celebration.
- Identifying recipients of a diversity champion award.
- Advising HR on diversity issues at the organization.
- Serving together on the organization's DEI council.
- Sharing best practices and lessons learned.

Building Management Support

Successful ERGs have strong support from both senior and middle management.

Senior managers are important because in addition to the direct assistance they can provide ERGs, top-level champions help build support among middle management simply by making their attitudes known.

Middle managers, on the other hand, are the people who implement the strategies designed by organizational leadership, and any ERG activities intended to have a broad impact on the organization must be supported by them. These individuals support the ERG by encouraging members to participate and helping promote opportunities for ERG members.

In the table below, you will find some actions you can take to win buy-in from both key constituencies.

SENIOR MANAGERS

STRATEGY	ACTION STEPS
Meet with senior leaders to build relationships	<p>Introduce the ERG's mission, goals, and annual strategic plan.</p> <p>Outline the business case for the ERG and how it will help the organization.</p> <p>Listen to and discuss business concerns and opportunities related to products, customers, and community relations.</p> <p>Understand concerns about the ERG and reinforce the ERG's importance in connecting leadership with the ERG membership base and meeting business goals.</p> <p>Explain how senior leaders can help the ERG by acting as champions, attending events, sending emails, speaking at ERG events, and informally advising the ERG.</p> <p>Ask for guidance and input on the ERG's annual business plan.</p> <p>Connect with senior leaders in smaller social settings, which may help them become comfortable with the leadership abilities of the ERG team.</p>
Present to the organizational leadership team as a group	<p>Provide a forum for discussion and visibility for the ERG.</p> <p>Reinforce the business case and detail specifically how the ERG will help the organization uphold its core values and meet its strategic goals.</p> <p>Describe upcoming activities.</p> <p>Clarify what the ERG is—and is not. Allay any concerns that the ERG is "radical," destructive, or a waste of the organization's resources; assure leaders the ERG is proactive and business focused.</p> <p>Agree on an annual business plan for the ERG.</p> <p>Agree on appropriate methods and frequency for ongoing communication. This may include an annual meeting, written updates, or an identified management liaison.</p>

MIDDLE MANAGERS

STRATEGY	ACTION STEPS
<p>Ask senior leaders to express their support of the ERG to middle managers</p>	<p>Request that senior leaders mention ERGs during speeches, letters, and other forms of communication and make sure to invite middle managers to any events where senior leaders are speaking.</p> <p>Ensure that senior leaders are informing middle managers when ERGs are a resource to the business (e.g., to build business within a certain demographic).</p>
<p>Demonstrate how the ERG can benefit middle management</p>	<p>Prepare examples of how ERGs provide:</p> <ul style="list-style-type: none"> Developmental, networking, and mentoring opportunities for direct reports who are members. Information on resources or external opportunities for training. Business insights. Access to information on issues such as flexibility options and career development. Speakers on topics relevant to individual managers' work.
<p>Find creative vehicles to communicate these benefits</p>	<ul style="list-style-type: none"> Host managerial meetings or annual "meet the ERG" workshops. Ask ERG members to inform their departments about ERG activities. Include articles in organization newsletters. Distribute an ERG newsletter to middle managers. Display flyers for events in high-traffic areas. Leverage social media to publicize ERG news and events.

Community

Many organizations leverage ERGs to link employees to their communities while enhancing the brand and supporting business. The community includes clients and customers, prospective and current business partners, suppliers, professional associations, prospective employees, alumni of the company, nonprofit organizations, and people supported by corporate social responsibility (CSR) activities. This outreach contributes to CSR, builds reputational capital in the marketplace, and favorably impacts the perception of the employer in the communities and markets it serves

Additionally, activities in the community can build visibility for the ERG within the organization and lead to increased membership and senior management support. ERGs may participate in and/or sponsor community events that allow them to give to the community, forge relationships with community organizations, and meet and get to know other professionals. By acting as ambassadors in their communities, ERG members can strengthen their connections to the organization.

Some ERGs have a committee that develops partnerships with local organizations with similar interests and goals. This committee may focus primarily on philanthropic activities, recruitment of a certain population, or engaging customers and clients. Examples of how ERGs have forged community relations are:

- At Barilla, regional ERGs are clear reflections of regional demand. Examples include:
 - **Alleanza**, in the United States, supports Latinx and Black employees
 - **Together**, in Nordic countries, promotes gender diversity and equal opportunities for all
 - **Thisability**, in Italy and France, is dedicated to issues related to disabilities
 - **Young**, in Italy, recognizes the differences among generations and helps them work together more effectively.
 - **Voce**, the Barilla’s largest ERG, has been instrumental in bringing LGBTQ+ voices to the forefront, including in countries where they are not culturally accepted.”¹⁵
- At Bank of America, the LEAD For Women employee network (LEAD) wanted to go above and beyond typical network activities. In 2016, the network began partnering with the Domestic Violence Task Force, which has hosted more than 100 training sessions to educate employees about how domestic violence impacts communities and employees, the resources and partnerships available to those affected, and national and local volunteer opportunities. The Life Event Services team, in partnership with the Task Force, has assisted nearly 1,500 employees since 2016—it has helped employees file restraining orders, provided emergency funds for transportation to shelters, offered guidance on how to talk to coworkers who appear to be in trouble, advised on how to make safety plans, connected to back-up childcare resources to be utilized during a last-minute move, and given suggestions on how to support a family member, among many other services.”¹⁶

Take Action, Achieve Goals, and Measure Success

Defining the ERG's Goals

ERG programs and activities should reflect the tone and purpose of the ERG, as well as the organization's broader diversity and inclusion strategy. Some common goals are:

- Increase support, knowledge, and skill development regarding career management and strategies for advancement.
- Build an inclusive workplace by raising awareness of constituency contributions to society and the organization.
- Increase knowledge, skill development, and input regarding timely business topics.
- Raise employee awareness of various cultures to better understand important constituents and markets.
- Promote organizational brand and increase market share.
- Advise on and communicate to the organization the accepted terms and language used to describe the constituency.
- Support the organization's efforts to recruit and retain talent.
- Build connections among ERG members.
- Increase visibility of ERG members with senior leadership.
- Establish relationships between ERG members and other groups, such as local office leadership, external professional associations, and community organizations.

Subcommittees

Once the ERG has defined its business case and developed a strategy, it should begin brainstorming action steps that will fulfill its mission and goals and support the organization's business strategy. It is often useful to delegate responsibilities to subcommittees.

Popular subcommittees include:

- Annual heritage and history month observances.
- Business development.
- Communications.
- Community relations.
- External business relations.
- Fundraising.
- Leadership forum.
- Marketing/sales support.
- Membership.
- Mentoring.
- Product development.
- Professional development.
- Recruitment.
- Retention.
- Work-life effectiveness.

Programs, Activities, and Events

ERGs should develop a wide range of activities where members convene for learning, sharing information, and building connections. There are many types of programs and activities that will help raise awareness and build an inclusive workplace, and they are summed up in the following categories:

- Networking
- Career development
- Business and product development
- Recruiting
- Community outreach

ERGs conduct activities anywhere from monthly to annually; quarterly events are most common. Some events are high-profile and large-scale activities, while others are smaller. The size of the event, of course, depends on the target audience. ERGs commonly invite one or more of the following groups to events: ERG members, managers, senior management, other ERGs, clients and prospects, and community organizations. Many ERGs plan a mixture of programs with some signature events open to non-members and intended for a large and diverse audience. ERGs with exclusive membership often design events for the entire organization that showcase the ERG and its contributions.

It is sometimes difficult to evaluate events. How do you know whether members are building skills or relationships? Often, a survey of four to five questions (What did you like/dislike? How useful was the event? Do you have ideas for other topics?) and informal feedback provide the best information. Event participants' comments are useful for planning future activities and writing year-end reports.

Note: When planning programs and activities, ERG leaders should be patient and have realistic expectations of goals and timing. Sometimes ERGs make the mistake of “trying to be HR” and plot out an ambitious set of programs and initiatives. They then learn that they don't possess the expertise or have the resources to deliver on such a plan.

TYPES OF EVENTS

The following activities represent the core of many ERG programs and events:

- An annual conference encompassing a wide range of networking and skill-development activities.
- Career development events, including workshops, leadership summits, and mentoring programs.
- Speaker series with discussions on topics such as cross-cultural communications and connecting across differences.
- Virtual meetings and webinars for holding discussions with members in different places.
- Cross-ERG events to share best practices and work toward common goals.
- Receptions with customers featuring a particular product.
- Networking events for current and prospective clients.
- Open house events for college students to learn about the organization, its business, and employees.
- Events hosted in partnership with professional associations.
- Meetings with community groups whose work supports that of the ERG.

PROGRAM, EVENT, AND ACTIVITY SUCCESS FACTORS

Despite the various skills and strategies involved in organizing different programs and activities, a few overarching factors can ensure success for all of them.

- Meet specific needs of ERG members. Content is what sells. If attendance is low, make sure members' needs are understood.
- Align programs with business needs. For every event, be sure that the ERG can answer the question, "What is in it for the business?"
- Effectively communicate events and programs as well as their purpose. Event publicity educates people about the ERG. Post event information on the organization's intranet, encourage managers to spread the word about events, and use flyers to publicize ERG activities.
- Keep events and programs focused. Focus programs by identifying goals and the target audience.
- Determine an objective. For example, is the purpose of a networking reception with minority-owned suppliers to familiarize minority-owned suppliers with the ERG, to establish ties with the suppliers, or both?
- Involve senior leaders. Let them know what the ERG is doing and encourage them to share their experiences and offer input. For instance, recruit senior leaders to act as mentors for junior-level members.
- Be realistic about what is possible. Sequence activities over time and try to avoid member and leader burnout. Remember that it is better to have fewer high-impact programs than a long series of programs with limited participation.

EXAMPLE OF BUSINESS-FOCUSED EVENTS

Effective ERGs look for way to serve as ambassadors to their organization by providing insight on product development and offering strategies for increasing market share among their constituency. A real-world example of how ERGs can work to achieve these objects is **PepsiCo, Inc.'s Women of Color (WoC) Multicultural Alliance**. This ERG joined together in the first Women of Color Multicultural Alliance National Conference. This three-day event, which served as an incubator for executive management levels, focused on team building, professional and personal development workshops and panels, and networking with other participants and senior executives within and outside of PepsiCo.¹⁷

PITFALLS TO AVOID

Too many events, asking the ERG to meet too often, or having laundry lists of activities/events that are not supported by an overall plan or strategy.

Tracking Effectiveness

After an ERG has been underway for a year, ERG leaders, members, Human Resources (HR), the Diversity, Equity, and Inclusion (DEI) Office, and senior leaders need to understand what is and is not working; what the ERG's strengths and weaknesses are; who is and is not benefiting from the ERG; and whether the ERG is meeting its goals. Many organizations require ERGs to monitor and report performance measures that demonstrate the ERG's impact on members and the business. Required or not, treating the ERG as a business initiative means tracking activities and results. Such measures are a valuable tool to gauge and share successes and best practices. They also set the stage for future improvements.

Evaluation measures should be discussed early in the planning phase of an ERG. At that point, an ERG needs to identify what metrics will help it assess its impact on ERG members and the organization. Activities can then be designed to align with these standards. The ERG should also be clear to whom and how often it will report on ERG activities and progress. This accountability helps ERG leaders focus on creating the most impact and making positive change for the future.

Reporting ERG successes to senior leaders, other ERG leaders, HR, the DEI Office, and ERG members generates enthusiasm and aids in planning future events and programs. It is especially important for senior leaders to honor the work done by ERG leaders and the participation of members, along with their impact on organizational culture and the bottom line.

However, ERGs should not be responsible for organizational goals, such as recruiting, retention, and career development, that are affected by multiple factors and are the responsibility of particular functions. ERG leaders should not promise—or hold themselves accountable for—more than they can deliver, and organizations should not expect that ERGs alone will enable the organization to become an employer of choice. ERGs can track trends in areas such as the recruitment and retention of the ERG constituency, but changes in trends should be regarded as indicators of the ERG's impact rather than the full responsibility of the ERG.

SAMPLE METRICS

An ERG needs to identify evaluation measures that are aligned with its mission and goals. But ERGs should be aware of the difference between items that *can* be counted and those that *should* be counted—all data does not necessarily measure effectiveness. Some measures may be collected by the ERG itself (e.g., membership, event participation, leadership/project management opportunities); others will need to come from HR or the DEI Office (e.g., organizational demographics). Metrics to consider tracking include:



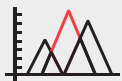
PARTICIPATION IN THE ERG

Event attendance by demographic group, level, and function.

Membership and growth in membership by demographic group, level, and function.

The number of highly visible speaking opportunities in front of senior leaders and others that members receive.

Views of the ERG's intranet page.



EVENT AND PROGRAM EFFECTIVENESS

Short surveys to assess events.

A review of the year's events and projects with attention to variety and scope.

Opportunities gained and connections made as a result of programming.

Experiences leading to promotions.



INVOLVEMENT WITH BUSINESS ACTIVITIES

Business leads and revenue secured by or through the ERG.

ERG-sponsored professional development activities.

Contributions to work environment and employer-of-choice initiatives.

ERG participation in recruiting activities.

Collaboration between ERGs and clients or prospects.

Attendance of current and prospective customers and clients at ERG events.

Sponsorship of activities that are of interest to customers and clients.

Sponsorship of activities that promote the organization in the community.



CORPORATE SOCIAL RESPONSIBILITY, OUTREACH, AND INVOLVEMENT

Review of ERG communications.

Inclusion of ERG communications in publications such as office newsletters and local newspapers.

Involvement in the organizational community (e.g., hosting career development workshops).

Involvement in the outside community (e.g., partnering with a community organization whose mission is closely aligned with the ERG's).

Involvement in the employer's philanthropic and community service activities.

The number of people affected by ERG community activities.



OVERALL ASSESSMENT

Annual survey of ERG members to assess their overall satisfaction, the ERG's impact on their professional and personal growth, and the ERG's impact on the workplace.

Focus groups or interviews with ERG members.

Business impact (e.g., growth in sales in constituent group).

Ways in which the ERG plays an advisory role.

Assessment of changes to organizational demographics.

Assessment of internal movement of ERG members who may have participated in developmental activities.

Collaborations with other ERGs.

Many ERGs find that developing a customized scorecard that provides up-to-date, at-a-glance data about where they stand relative to their goals (focus areas, accountability measures, overall goal status, etc.) provides an extremely helpful tool to quickly assess alignment. We have included an example below:

EXAMPLE ERG SCORECARD

FOCUS AREAS	ACCOUNTABILITY	TIME FRAME	METRIC	STATUS
RETENTION & PROFESSIONAL DEVELOPMENT				
Out and Equal Conference	National D&I	Oct 2021	Sending 6 employees to conference who are presenting at workshops	On Track
AGLCC Business Builder Lunches (speaker)	Professional	Ad hoc	Twelve individuals presenting sessions	On Track
Skills-based presentation for Board Retreats	Professional	Twice a year	Professional Development (2), community	On Track
Speaker Series - Healthcare Reform	Professional	Nov 2021	Engage 10 practitioners/client service leadership	On Track
RETENTION & PROFESSIONAL DEVELOPMENT				
AGLCC Job Expo	SE Recruiting	March 2021	Qualified candidates reviewed/received	Some Issues
SE Recruitment Fairs at targeted MBA schools	SE Recruiting	Jan 2022	Qualified candidates reviewed	On Track
Reaching Out MBA Symposium	National D&I	Nov 2021	Qualified candidates reviewed/received	On Track
PROFESSIONAL RELATIONSHIPS				
Atlanta Gay and Lesbian Chamber of Commerce - 4th Friday Events	Professional	Ongoing	Network connections, professional development opportunities (4)	Off Track
Professional Firms Speaker Series	Professional	Ongoing	Business relationships, professional development (5), community	Some Issues
Atlanta Inter-corporate Pride Calls	Professional	Ongoing	Professional development (5)	Some Issues
Out & Equal Town Calls and Meeting	Professional	Ongoing	Professional development (2), eminence	Off Track
COMMUNITY INVOLVEMENT				
Atlanta Pride: Pride Banners with company logo around Atlanta in June	Atlanta GLOBE Officers	Oct 2021	Community eminence, professional development (5)	On Track
AIDS Walk - Red Ribbon Fundraisers, Jeans Day, AIDS Walk sponsor, United Way	AIDS Walk Lead	Oct 2021	Professional development (5), community, business relationships (2)	On Track
HRC: Atlanta HRC Dinner & Silent Auction	HRC Lead	May 2022	Community, professional development (5), business relationships (4), retention	On Track
CHRIS Kids: IMPACT Day, Mentoring, United Way	CHRIS Kids Lead	Feb/June 2021	Community, professional development (5)	On Track

These steps help you measure the impact of your ERG, regardless of the way you choose to show progress and success:



Troubleshoot Challenges and Refine Your ERG

No matter how good their intentions are, the reality is ERGs can sometimes struggle. In this section, we review common internal and external challenges to the success of **established employee research groups** (ERGs) and suggest solutions. We also address the concerns and resistance from the employee base and management that often meet new or **newly formalized ERGs**. The sections on membership issues, success factors, and future directions are relevant to both new and established ERGs.

Common Challenges

ERGs are continually adapting and making changes—responding to business needs, modifying subcommittee goals, seeking to expand membership, and building management support. A nimble ERG is a savvy business partner, able to adjust without changing the ERG as a whole.

Sometimes, however, significant change is needed. Circumstances may require major decisions related to the ERG’s mission, strategy, and activities. These challenges are often opportunities to reshape and reenergize an ERG. For example, some ERGs have confronted a lack of interest in events or changes in headquarters and field locations that threaten to shut down the ERG. Even high-performing ERGs may find the need to change strategy as business needs develop. In other circumstances, organizational mergers and acquisitions may require the merger of ERGs from two distinct organizations or a change in structure.

All ERGs should regularly monitor their sustainability and effectiveness. Being able to transform to suit business needs is an essential skill that will keep the ERG relevant for a long time. There are many dynamic ERGs that have overcome challenges by revitalizing their strategy and even their mission.

INTERNAL CHALLENGES

Internal challenges are usually related to ERG strategy, membership needs and interests, and ERG effectiveness. Common internal challenges and proposed solutions include:

STRATEGY

- **Outmoded strategy.** Strategy needs to be revised as new circumstances arise. Consider an ERG that pioneered a career development program. Now, Human Resources (HR) runs a program that meets those goals. The ERG needs to step back and rethink its strategy; it should build on, rather than compete with, HR activities. Another ERG may have held a large annual global women’s leadership gathering. Now, there are organizational travel freezes and cuts in expenditures. The ERG needs to plan a different kind of event.
- **Mismanaged growth.** Often, ERGs that are headquarters-based expand to new sites nationally and globally. They need to consider which organizational framework makes most sense for their expansion and define a local approach that still makes sense globally.
- **Misalignment of strategy and perceptions.** It is important to be clear about strategy and align programs with it. Also, an effective communications strategy that publicizes what the ERG is and is not is necessary. For example, if an ERG’s strategy focuses on business development and community relations, but members and the broader workforce perceive that the ERG is primarily a social group, there will be a gap between expectations and ERG activities. Alternatively, an ERG that simply complains to HR rather than acting in line with its strategy to help HR develop solutions will lose members and credibility over time.

- **Lack of accomplishments or inability to reach goals.** Many ERGs focus on events. However, it can be easy to fall into the trap of designing interesting events that don't ultimately advance strategic goals. Programs—events and other activities—should align with a larger strategy that meets the needs and goals of members and the workplace. Then, the ERG should track metrics to gauge progress, which should be publicized. If there is a lack of senior-level support, the ERG should revise its strategy for building and maintaining support.
- **Lack of vision for future activities.** If the ERG lacks a vision for future activities, it should reevaluate the needs of its constituency and the organization to develop new goals. For example, the ERG could expand its efforts into the community or focus on product development. See the [section 7, page 61](#) for more ideas.

ROLE CLARITY

- **Lack of clarity between ERG and HR or Diversity, Equity, and Inclusion (DEI) Office roles.** The ERG's changing role in developing HR or DEI programs or the assumption of ERG responsibilities by HR can cause misunderstandings, but they can also lead to opportunities. For example, a career development program run by HR can be extremely important to employees. The ERG should consider how it can add value to the program, perhaps by advising HR about how the program can be tailored to ERG members.
- **Overpromising.** While the ERG may want to promise a great deal, it makes sense to understand what is and is not the responsibility of the ERG, and what the ERG has the resources to accomplish. If members are feeling burned out and yet some goals aren't being achieved, there may be more goals than is realistic.

MEMBERSHIP

- **Difficulties fulfilling the needs of a diverse membership.** The membership of many ERGs is diverse and meeting the needs of all members can be challenging. For example, a Latina/Latino ERG may have members from many different countries in Central and South America. Or a pharmaceutical company may have members from various functional areas (e.g., scientists, plant personnel) with different development needs and scheduling demands. To include them all, the ERG should implement a range of events and programs, target programs to different interests and needs, and use technology to help members connect.
- **Membership decline.** Low participation is usually a symptom of other issues that need to be identified. Is there a lack of interest in programs? Has the ERG become a club for a particular segment of the population rather than an open, vital, business-focused group? Do members lack time to devote to the ERG? Do members think managers undervalue the ERG? Does the ERG focus on a dwindling on-site population when most employees work outside the office? Once the problem is identified, the ERG should take steps to address it.
- **Restrictive membership criteria.** ERGs should be flexible as they expand their membership. A survey of current ERG members will guide the ERG in its new approach. To solicit new members, communicate the ERG's change in membership criteria and goals to the organization, be savvy about developing a membership drive, and engage in personal outreach.
- **Homogenous membership.** Who participates in the ERG? Who does not? Is the women's ERG primarily a White women's group? Does the ERG draw heavily from a particular age range? Are members of the LGBTQ+ ERG primarily men? Are members of the ERG primarily from particular levels or functional areas? To increase demographic diversity, reconfigure the leadership team to reflect the entire membership. Reach out to people who don't typically participate. Host events with other ERGs. To increase level and functional area diversity, create a range of programs targeted to different levels, with some programs designed to bring people together.
- **Changes in member interests.** Member interests tend to change every few years and to relate to developments in the business environment, in support provided, and in larger social factors. Programs should also change to reflect this. Find out what members are interested in now. Be strategic and adjust goals and activities to reflect those interests as well as the broader dynamics. In some cases, the ERG may need to revise its mission and goals.
- **Changes in ERG leadership.** Succession planning is an important part of ERG sustainability. When a strong leader moves on and is not replaced, the ERG may need to scale down its activities. When a new leader takes over, the ERG can restart itself. One cause of leadership turnover is the heavy workload involved in ERG leadership, which is one reason why term limits are important. This turnover is also hopefully a recognized part of the leader's professional development plan and will lead to

other internal career opportunities. When an organization does not formally recognize ERG leadership as a legitimate business activity, or there are not enough people involved in leadership, the workload for leaders can become unsustainable. Advocate for ERG leadership responsibilities to be part of the individual's job responsibilities and reflected in annual goals.

- **Reduction in member availability.** If members have less time to devote to the ERG, programs and activities should be streamlined. Gather data on member interests and start eliminating the activities that don't directly respond to their needs. Also, think about reducing activities that take a great deal of time and energy to coordinate.

See [Section 2, page 20](#) on membership issues for more.

LACK OF MANAGEMENT SUPPORT OR FUNDING

- **Resistance or lack of support from managers.** When managers do not support the ERG, it is essential to reinforce the business case for the ERG to them. Demonstrate how the ERG functions as a strategic business partner, engage in dialogue about business needs, and provide details about upcoming activities. Continuously educate and communicate and enlist the support of senior leadership.
- **Lack of funding.** Funding challenges are likely at down times in the business cycle. They are particularly challenging for ERGs that hold large events and have significant expenditures on food, travel, hotels, and outside speakers. ERGs can showcase their effectiveness by being proactive, focusing on business needs and coming up with alternatives. In addition, if HR and/or the DEI Office start creating programs that are helpful to the ERG constituency, they may receive funds that might have otherwise been available to the ERG. Though the ERG may lose funding in this way, members will get the support they need. To review different funding tactics, see [Section 2, page 21](#).

EXTERNAL CHALLENGES

ORGANIZATIONAL CHANGES

External challenges to ERGs often relate to changes in management or organizational goals. In the face of any of these events, take two steps. First, **identify the problem**, not merely the symptoms. Second, **construct an appropriate response**. It's important to recognize what the ERG can and cannot do. Guiding the ERG through a transition requires flexibility and willingness to change. Some common external challenges and ways to approach them follow:

- **Downsizing at organizational or business-unit level.** It is important for the ERG to be nimble and business-focused when the business is downsized. Many will reduce activities during this time, but they should make sure to maintain activities that will help members in an uncertain work environment. Also consider how the ERG can be helpful to the business. This may be a good time to focus on increasing sales in markets the ERG understands or innovating product and work processes. Refocus on member needs and services the ERG can provide itself. It is particularly important to maintain support during this time. When planning events, think about level of visibility and broad appeal.
- **Relocation of corporate or field locations.** Many ERGs facing this challenge shrink their event base and start to share information through the web and other interactive approaches. They may consider fewer and smaller activities and ways to share programs across locations.
- **Departure of executive sponsor.** When an executive sponsor leaves, the ERG should do a reality check—it may still have a great deal of support on the executive team. Cultivate and work with new senior executives. If senior-level support is lacking, learn from the situation and take action. The ERG may need to rebuild support from the beginning. Use other champions and partners and document the strategy and successes. The ERG may need to put in a lot of time and effort to reach a leader or senior group. Realize that this investment is worth the time.
- **Appointment of less supportive executive team.** The ERG should revisit its initial proposal to senior leadership and create a more business-driven plan to build executive support.

- **Organization seeks to formalize and integrate existing ERGs into a broader DEI or external market strategy.** [Section 5, page 40](#) discusses the opportunities afforded to organizations when they create umbrella structures to synergistically coordinate their ERGs with other DEI initiatives. For ERG leaders, this is an opportunity to review strategy in relation to other organizational DEI activities and collaborate to pool resources and expertise. It is also an opportunity to showcase ERG successes to date, learn from other ERGs' best practices, and innovate further.

RESISTANCE FROM EMPLOYEES

It is not uncommon for new ERGs to meet resistance from various audiences. Some employees might not initially understand the need for an ERG for one specific group and may view it as exclusive or providing preferential treatment. This is particularly true for ERGs that have exclusive membership and new ERGs that have not yet had an opportunity to publicize inclusive events and activities.

Typical responses include: "Why do we need an ERG for this group?" or "Why isn't there an ERG for my group?" or "Does this mean we need an ERG for everyone?" ERG leaders should respond to these types of questions by clarifying the objective of the ERG. Refer to [Section 2, page 13](#) for a range of typical ERG goals and objectives as well as benefits to all employees and the organization.

Employees often initiate ERGs explicitly because they do not have the same access and opportunities as employees who share more characteristics with organizational leaders or because there are significant business development opportunities connected to their group. An ERG allows employees to focus on their similarities, celebrate differences, and gain developmental opportunities and visibility. ERGs are also a source of mentors, role models, sponsors, and colleagues who can provide valuable knowledge and information. ERGs are not meant to be exclusionary but to fill a gap and provide a community for employees who are not well represented in leadership and sometimes in the organization overall. ERGs are also cross-functional teams that assist the business by providing insight about the constituency that can be extremely helpful and of interest to people outside as well as inside of the group.

Here are some useful steps for addressing resistance from employees:

- Broadly communicate how various groups in the organization benefit from the ERG. Using concrete facts where possible, emphasize that the ERG can serve as an effective tool in advancing, retaining, and attracting top talent, and furthering other business objectives.
- Create opportunities for senior leaders to showcase their support and understanding of the ERG.
- Emphasize the business case for ERGs in management, diversity, new employee training, product development and marketing, and community outreach.
- Sponsor activities and events for all employees, and market these events broadly.
- Highlight successful ERG events, activities, strategic goals, and members.
- Research and communicate progress in improving the career development and advancement practices for all employees in the organization.

Sustaining or Revitalizing Membership

Established ERGs often struggle to engage the entire membership in activities. There is a big difference in commitment between members who keep the ERG going and those who simply attend events. Keeping the membership committed and continuing to build the membership are two challenging tasks. They are also the lifeblood of the ERG and an ongoing leadership responsibility.

Successful ERGs use many strategies to gain members throughout the life of an ERG. These ERGs think not only in terms of sheer numbers, but also about whether the membership has the right mix of employees from a range of levels and functions. They strive for diversity in terms of race, ethnicity, sexual orientation, and other workplace demographic variables.

INCREASING MEMBERSHIP

Potential members generally belong to one of three groups. Reaching out to each group requires a different approach:

- **Employees who know little about the ERG and have never been involved with the group.** This is the largest group of potential members and the most dispersed. Connecting with them takes broad communication efforts. Hard copy mailings, emails, or dispersions of posters may be necessary to encourage attendance at events. Virtual events, social networking, and live streaming can connect dispersed members as well. Some ERGs have formal “meet the ERG” events annually, open to all potential members in the organization and publicized through invitations and announcements sent via email and newsletters. These events often have two objectives: to convey information about the ERG and why participants should join (e.g., through a presentation by the ERG leader) and to allow participants to sample an ERG activity (e.g., by presenting a speaker on career management or a timely business topic).
- **Employees who may know about the group through colleagues who are members.** To best tap into this group, the ERG should reach out to people individually. Because these employees already understand the ERG’s mission and goals, they are less likely to be enticed by general events. Ask current members to speak directly with these potential members about their interest in joining the group. Some ERGs have membership drives and expect that each member will bring in three to five new participants. This approach is very effective because the membership message can be tailored individually. Also, because new members already know participants, the orientation process can be easier and can result in a more cohesive group. Relying only on this strategy can result in an insular group, however, so balance this approach with strategies that reach out to groups of individuals who have historically not been members of the ERG.
- **Former members who no longer attend events or participate in activities.** This is an important category, even if none of the people the ERG approaches decide to re-engage with the ERG. It can be a bellwether for how the ERG is or is not fulfilling the needs of its members. The reasons former members decide not to participate is important information that the ERG should use to revitalize its strategy.

ONBOARDING NEW ERG MEMBERS

No matter how old the ERG is, it should have an approach for integrating and orienting new members. Small groups of new members can participate in formal orientation sessions. Many larger ERGs use a new members kit, which should include the following materials:

Mission statement.

Summary of ERG goals and strategy.

ERG history or timeline of major accomplishments and activities.

Summary of ERG’s operating rules and structure.

Names and roles of ERG leadership.

Names and numbers of steering committee members and committee chairs.

Announcement of upcoming activities.

ERG directories.

Information on how to join subcommittees.

It is also essential to hear the ideas and interests of new members because they can make a difference in the ERG’s tone and approach. Be flexible and try to balance the need for continuity within the group with the imperative of change.

DIVERSITY IN LEADERSHIP AND MEMBERSHIP

To be successful, the ERG's leaders should reflect the targeted membership. For example, if the ERG is targeting women at multiple levels, then ERG leaders should come from several different levels. If a Black ERG wants to attract members of the sales force, then its leadership should include a Black salesperson. It is not uncommon for an ERG to struggle to obtain the participation of particular employee groups. Ensuring that the targeted groups are represented on the ERG leadership team can help to mitigate this challenge.

An **ERG that has successfully created a diverse membership** has done two things. First, it has **treated diversity as a goal** and actively reached out to a broad range of participants. For example, a women's ERG will not assume that all women will feel invited. Instead, it will take a proactive approach, perhaps calling the ERG a multicultural women's ERG, identifying a diverse leadership team, and inviting a range of people to meetings. It will welcome members who are active in other ERGs as well. The ERG will survey or interview potential members who are unlike most of the members to better understand their needs and interests, and it will use the results to create appropriate programs and activities.

Second, the ERG **has continuously noted the types of people who do not attend ERG events** and activities. It has examined itself for biases or approaches that discourage others from joining. It has looked at not only its internal systems, but also the events themselves, asking questions such as:

- Were event speakers and panelists diverse?
- Did exhibits for Women's History Month reflect the experiences of women of color? Women with disabilities?
- Did events for Black History Month reflect the experiences of new immigrant populations?
- Does the working parent ERG adequately support or address the needs of single fathers?
- Does the LGBTQ+ ERG equally represent the issues of lesbian, gay, bisexual, and transgender employees?

SUSTAINING LEADERSHIP VITALITY

In [Section 4, page 31](#), the importance of creating an ERG leadership pipeline is discussed, and recommendations are made to ensure this practice. Succession planning is one of the most important parts of ERG sustainability. An ERG's success is driven by its leaders' ability to energize membership to take on extracurricular responsibilities on top of demanding workloads. Leaders invest ample time in reaching out to various constituents including organization executives, noteworthy influencers, and employees at all levels. This hard work cannot be sustained indefinitely, both because of the energy it demands of the leader and because of its impact on the ERG itself. An ERG must be recognized for its mission and accomplishments, not the dynamic personalities of its leaders.

In addition, individuals new to ERG leadership need to be aware of the activities that the former leaders undertook and the people with whom the leaders interacted. This will ease the transition, ensure the continual success of the ERG's initiatives, and reinvigorate the ERG with new ideas.

Success Factors: Communications and Purpose— Pulse Check

Well Defined and Clearly Understood:

Do you have a clear mission, vision, and strategy for your ERG? Would HR and DEI leaders agree? Do people outside of your ERG know what your purpose is and what work you will do? On a scale of 1-10, with 1 being “not at all” and 10 being “extremely,” how well-defined would you rate your ERG or ERGs?

1 2 3 4 5 6 7 8 9 10

What could move you up the scale? What actions or plans should you consider to gain a more well-defined strategy, goals, or communications?

Are internal communications about your operations clear? Would your members say they understand their role and how it fits within the overall work of the ERG and the overarching business goals of the organization? What about the employee population at large? On a scale of 1-10, with 1 being “not at all” and 10 being “extremely,” how would you rate your ERG or ERGs as being clearly understood?

1 2 3 4 5 6 7 8 9 10

What could move you up the scale? What feedback, plans, or actions should you consider to be more clearly understood as an ERG?

Through our experience with ERGs, Catalyst knows what works and why. ERGs should be mindful of the following success factors:

CLEARLY ARTICULATED BUSINESS CASE

The business case answers the question, “Why have an ERG?” In its answer, it articulates how both members and the organization will benefit from the ERG. It is formed by distilling the following information:

- The demographics of the employee base at various levels of the organization.
- The demographics of the client base and/or customers, including market trends and purchasing power.
- Feedback on the internal environment gathered through focus groups, surveys, or other avenues.
- Benchmarking organizational DEI efforts and employee demographics against competing and/or best-in-class organizations over time.

Often the business case is developed in collaboration with HR, the DEI Office, and line leaders (some of whom may also be ERG members), so that the ERG is aligned with business needs. Many ERG leaders have indicated that their ERG’s success is linked to how well its goals and programs are tied to the organization’s business.

WELL-DEFINED MISSION

ERGs must understand and meet member needs. There are many ways to collect information about potential member issues and interests. The ERG will build knowledge on the most effective methods over time. The mission is the ERG’s compass, and it is important to ensure ERG activities are clearly tied to it. ERG leaders must understand the mission. They should be strategic about ERG activities and events and be able to articulate the value of each one. They also need to make the best use of finite resources of time and money in positioning the ERG to have impact according to its mission.

CREATING A LONG-TERM STRATEGY AND ANNUAL BUSINESS PLAN

A strong strategy is essential to building and sustaining an ERG, and it underscores that the ERG is a business activity. There are many directions an ERG can take, but it should not create a laundry list of programs. Instead, it is important to have a well-defined strategy that aligns with the business case and the organizational context. The ERG should have no more than three or four areas of focus, and it should define goals and activities aligned with each, along with metrics that will track progress.

The older an ERG is, the more important it is to evaluate its impact on members and the organization. ERGs that have been around for three years should examine their goals, objectives, programs, and activities, and evaluate whether they still fit with the ERG’s mission and organizational context. Consider creating a subcommittee to carry out this evaluation.

With data on programming effectiveness, impact, and membership satisfaction, ERG leaders, HR, the DEI Office, and organizational leaders can determine the direction of the ERG. Depending on the results, the ERG may choose to modify areas of focus and realign goals and activities accordingly. It may also launch new subcommittees and eliminate others, expand into new locations, adopt new membership outreach methods, or develop new activities. In any case, the ERG should ensure that its newly refined strategy is firmly aligned with the organization’s business goals.

PERIODIC EVALUATION

An ERG is a living organism, so it is important to periodically revisit the ERG strategy, mission, and business case to ensure alignment with organizational needs and business priorities. After an ERG has been active for one year, ERG leaders should conduct a formal review to determine whether the ERG is meeting its members’ needs and organizational goals and priorities. Learn more about evaluating, including which metrics to analyze, in [Section 6, page 47](#).

WELL-MANAGED COMMUNICATIONS

Communication is critical not only to an ERG's success but also to its sustainability. ERG leaders must share their vision and help both members and the greater organization to understand why the ERG's work is important. To accomplish this, the ERG needs to craft targeted communications—including company intranet, video, and social media—that publicize its events, programs, and successes. To review different communications tactics, see [Section 2, page 23](#).

SENIOR EXECUTIVE SUPPORT

Senior leaders set the tone at their organizations. Thus, an organization with senior leadership support for DEI efforts will likely make change at a faster rate than an organization without it. That is why it is critical for organizational leaders to demonstrate their support and sponsorship of ERG agendas. For example, executive sponsors can support ERGs by sending ERG event invitations through their email, participating in events, speaking on panels, funding ERG activities, and updating other senior leaders about the ERG's activities. For more information on securing senior leader support, see [Section 5, page 41](#).

Success vs. Impact?

What makes an ERG impactful? Is it the same as what makes it successful? Experienced ERG leaders and members, as well as experts and seasoned HR/DI leaders, know that these are not the same goals. Therefore, we need to consider both success and impact for an ERG to reach its full potential as a change agent and vehicle of employee support.



What defines ERG success? Some examples include...

- Strong, vocal, and committed executive-level, HR, and DEI support and participation.
- A well-defined strategy and goals that are aligned with the organization's business plan.
 - Committed ERG members.
 - Adequate financial resources and time.
 - Mechanisms to track and measure effectiveness.
 - Increased membership year over year.
 - Other?



What defines ERG impact? Some examples include...

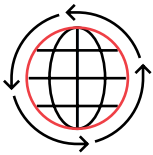
- ERG leaders are included in identifying high-potential employees and organizational succession planning.
- ERG participation correlates with career progression.
 - ERGs drive products or services that address the needs of their constituencies within the organization and in the marketplace.
 - Employee survey results demonstrate higher levels of engagement or inclusion among those who participate in ERGs (for example, individuals self-report higher levels of belief that their voices are heard, freedom to bring their authentic selves to work, and confidence that they are trusted and that they can take risks and innovate).
 - Organizational leadership publicly recognizes ERGs, for example in town halls, in all-hands meetings, or in media reports and interviews.
 - The organization's strategic plan clearly shows ERGs and where they fit within the business and individuals' goals.
 - Strong ERG member satisfaction data.
 - Corporate Social Responsibility contributions that result from ERGs' work.
 - Other?

Refining Your ERGs

Many ERG leaders focus on perennial issues such as understanding member and organizational needs and addressing why the group is not better represented at the senior levels of management. They also work on strengthening the ERG by recruiting new members and leaders and ensuring that the ERG's programs are meaningful and valued.

Beyond the foundational issues, however, ERGs should not lose sight of their long-term strategy and growth. Many ERGs typically progress from a domestic membership, sometimes focused in a major central location, to other regions. Others develop a homogeneous membership into one that is more diverse and inclusive through concerted efforts and intervention. Lastly, ERGs that are initially internally focused often move over time toward programs with external groups, customers, and clients.

GROWTH AND GOING GLOBAL



- Forming/strengthening relationships with ERG chapters beyond the headquarters location.** Successful ERGs often begin to think about expanding beyond their initial location. This growth may be generated by the ERG itself or coordinated by headquarters. Either way, the creation of regional chapters benefits from an organized approach. Many ERGs create guidelines that lead new chapters through processes established through the trial and error of the original ERG's launch. Some ERG leaders and executive sponsors also participate in launch efforts for new chapters to showcase the ERG's past successes and future potential. Members in new locations may also bring new energy and fresh ideas that strengthen the entire initiative.
- Forming/strengthening relationships with ERG chapters in international locations.** For multinational organizations, global ERGs are instrumental in insuring that diverse employees have access to professional networks beyond their country of business. Multi-country ERGs create partnerships beyond national borders and functions, assist with career development, and broaden the business knowledge of their members. All these benefits strengthen organizational pipelines of talented employees.
- Advising new ERGs and the DEI efforts of other organizations.** Successful ERGs are often sought after and make themselves available to other organizations that are interested in learning more about DEI initiatives. This strengthens the organization's brand, creates leadership opportunities for expert ERG ambassadors, and helps develop strong relationships with potential client/customer/partner businesses.

For more about setting up ERGs, refer to [Section 2, page 7](#).

INCREASING DIVERSITY WITHIN THE ERG



- Creating structures for subgroups.** Many ERGs find it useful to develop committees to address the needs of specific sub-constituencies or create smaller affiliate ERGs to meet member needs and increase membership. This approach is particularly effective when addressing career stage concerns for junior, mid-career, or senior employees or when focusing on a functional area, such as R&D in a pharmaceutical company.
- Opening membership to all employees.** To build an inclusive environment, some organizations have required ERGs to be open to all employees. This strengthens cross-ERG functionality because employees are encouraged to join or participate in more than one ERG. It also fosters inclusion and better utilizes resources, making ERG co-sponsorship of events easier to coordinate.
- Creating roles for ERG members not from the target demographic.** In some ERGs, specific roles within the ERG structure are reserved for someone who does not have a demographic connection to the ERG (e.g., a man in a women's ERG). It is relatively common for a man to be an executive sponsor of a women's ERG. However, it is possible to go beyond this approach. For example, a women's ERG may reserve spots on each committee for men. Another women's ERG might develop men as diversity champions through their leadership of national and local teams. By participating in a women's ERG, men play a larger role as partners in creating an inclusive workplace.

- **Creating incentives for participation.** No matter who the ERG is reaching out to, it should ensure that participation is appealing. Branded giveaways in new employee orientation packets, training credit for participation in events, highly visible awards for DEI champions, visible role models and mentors, enticing activities available to all through virtual events, and personal invitations to activities are some of the ways ERGs broaden and diversify their membership. Organizations and managers that encourage ERG participation and include it in performance reviews also stimulate membership growth.

INCREASING BUSINESS ALIGNMENT



- **Establishing the business case based on internal workforce data and external marketplace data.** Aligning ERG goals with business goals is integral to attaining success and executive support. ERGs can assess the organization's business opportunities through the lens of their group members. For example, an ERG may conduct focus groups with its members to help the Marketing Department consider how to sell to consumers of its makeup. Executives are more likely to understand the benefits of diversity and inclusion and the challenges and opportunities of the ERG's members if they are discussed in the language of business.
- **Increasing the ERG's value to the organization.** Developing a business case that addresses organizational strengths, weaknesses, and opportunities will not only engage the organization's leadership in dialogue but will also help the ERG identify how it can support senior management's high-priority business goals. Strategic ERGs are increasingly aiding business development, providing market insight, and expanding outreach to consumers. For example, a women's ERG may devise a program to help men better engage with women customers. Not all ERG actions need to be focused on the external market, however. ERGs can also support business goals when they develop their member base, connect members across business units and functions, and act as a recruitment resource.
- **Focusing externally.** Working with clients, professional organizations, and community organizations not only extends ERG members' personal and professional networks, but also strengthens the brand, visibility, and reputation of the organization. Some ERGs create sophisticated tracking systems to understand how their outreach activities contribute to recruitment, client leads, and sales. Other ERGs help their organizations seek recognition by magazines or professional organizations as an employer of choice, which strengthens their reputation with potential recruits and clients/ customers.
- **Acting like a business unit.** ERGs aligned with business goals should have annual operating plans tied to business needs, and they should use metrics to track progress to goals and provide quarterly updates to senior leadership. This approach is common in highly organized ERGs with active executive-level employees in the top tiers of ERG leadership. It benefits members by giving them the opportunity to experience how a business unit operates and to participate in its general management and administration.
- **Recognizing ERG leadership as a skills-building development experience.** Leading an ERG can be demanding, time consuming, and taxing. It is also a way to learn critical leadership skills, such as navigating the organization's policies and politics, increasing the breadth of one's influence, and building business competency. All these skills prepare leaders for greater organizational responsibilities. Some organizations link ERG leadership roles with their talent development and succession planning processes. This not only helps develop a diverse pipeline of talent, but also provides an incentive for the organization's talent to take on the extra demands required of ERG leadership roles. Incorporating the ERG leadership role in the arsenal of management development activities will bring credibility to the ERG, make it more effective, and increase the organization's ability to tap diverse talent for leadership roles.

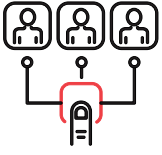
THE INCREASING PRESENCE OF FAITH-BASED ERGS



Increasingly, faith-based groups are being created to honor cultural differences within the workplace. A few organizations include religion and spirituality as dimensions of diversity and sponsor ERGs formed around a common religion to support DEI goals. Another approach is the creation of an interfaith ERG that facilitates greater awareness and respect across religions represented in the workforce.

The role of religion in the secular business world remains a contentious issue, and organizations vary in the type of support they grant religious groups who seek organizational sponsorship. Nevertheless, faith-based groups are increasingly aligning themselves with business goals and are gaining organizational support as ERGs with funding and executive sponsorship.

INCREASING THE USE OF ONLINE SOCIAL NETWORKS



Smart organizations leverage social networks to connect employees and share information with stakeholders including customers, shareholders, and prospective and current employees. These organizations recognize that this type of interaction can inspire innovation, effectiveness, and greater organizational cohesion. As ERGs globalize, expand in membership, and become more focused on helping the business, they are discovering new ways to reach and interact with their members and other stakeholders.

ERGs can take advantage of online social networking tools already in use by their organizations such as Slack and Teams (for open brainstorming) and intranet sites, Facebook, Twitter, Instagram, and LinkedIn to communicate with members and enhance employee contributions. For example, email and internal social networking tools such as Beehive are used by IBM Canada's Diversity Network Groups (DNGs) to organize and communicate with members of the DNGs. Beehive helps employees make new connections, track current relationships, and renew contacts.¹⁹

ERGs can use social networking tools to keep members aware of, involved with, and supportive of the group's direction and activities. They can also use them to keep leadership and all employees abreast of activities, progress, and achievements. By using social networking tools across borders and time zones, ERGs can break down barriers to relationships based on demographics and location, and they can encourage collaboration around common interests.

ERGs can use social networking tools in the following ways:

- Supporting organizational efforts to innovate by posting ideas to an internal website that everyone, including business executives, can access. Supporting organizational recruitment and brand promotion efforts by creating Facebook groups and pages, Twitter profiles, and LinkedIn groups and profiles.
- Using chat groups to brainstorm ideas for business development activities and events.

TAKING YOUR ERGS FURTHER—MORE ASPECTS TO CONSIDER



- Do you have a strong succession plan(s) in place for ERG leadership?
- Is sponsorship part of your ERG? What connections can you make within the organization to make a greater or deeper impact?
- Have you had a strategy meeting or "retreat" to determine the next phase or stage of your ERG and how you will get there?
- Given the way work has changed, and will continue to change, what aspects of your ERGs should be reexamined to ensure sustainability and longevity for years to come?
- Are your ERGs intersectional? Do at least some of their activities and work focus on creating an inclusive workplace that supports employees' multiple identities?
- We can always be better allies. How can you move your ERG and members towards deeper allyship?
- What else might you do to take your ERG to the next level?

ERGs are most successful when thoughtful planning meets committed passion.

For more information on ERGs, please visit the Catalyst website at www.catalyst.org.

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