

EN *ERG* IZE

YOUR WORKFORCE

About this event

This virtual event series will engage and connect Employee Resource Group team leaders across companies, industries, functions, and regions.

Participants will gain new ideas and practices on inclusion and will have the opportunity to:

- Define, communicate, and measure ERG goals.
- Learn how to navigate challenges for established or emerging ERGs.
- Determine how to position your ERG for success.
- Gain strategies on ERG funding.
- Connect with ERG leaders.

Attendees who participate in each event in real time or on demand will receive a Certificate of Completion at the end of the four-part series in November.

Download the [EnERGize Your Workforce Event Series Flyer](#) to share with your team.

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Thursday, 11:00 AM - 1:30 PM ET (LIVE)

Game, Set, Match: Defining Success & Getting to the Goal

Today's employee resource groups (ERGs) are more important than ever. With the global workforce under strain due to Covid-19 and the subsequent fallout from the Great Resignation, along with increased awareness of the urgency of social justice, employees are seeking leaders and team members within their organizations that align on values and understanding. Join us to learn proven and innovative strategies that support your company's workforce and meet organizational key performance indicators (KPIs).

Moderator



Megan Kincaid Kramer

Catalyst

Vice President, Community Growth
and Engagement

Speakers



Sarah Dinolfo

Catalyst

Senior Director, Advisory Services



Todd Baker

Catalyst

Senior Associate, Advisory Services



Betty Vasquez-Stevens

Guardian Life Insurance

Head of Internal Controls Over
Financial Reporting



Jeff Harrell

BMO

Director, Delivery, NACB Client
Service & Implementations, GenBMO
Co-Chair



Laurie Carson

BMO

Director, Deposit Operations,
GenBMO Co-Chair



Souroth Chakrabarti

BMO

Senior Advisor, Employee Resource
Groups

Agenda

April 28, Thursday, 11:00 AM - 1:30 PM ET

11:00 AM - 11:05 AM

Welcome & EnERGize Activity



**Megan Kincaid
Kramer**

Vice President,
Community Growth
and Engagement,
Catalyst

11:05 AM - 11:15 AM

Research Burst

Setting your ERG's goals is the first step to organizational success. Join Catalyst Advisory Services experts, Todd Baker and Sarah Dinolfo, as they share key tips for setting goals and highlights from the Catalyst Employee Resource Group toolkit. Leaders of emerging and established ERGs alike will gain pointed direction and best practices that help their teams to align, focus, and measure goals.



Sarah Dinolfo

Senior Director,
Advisory Services,
Catalyst



Todd Baker

Senior Advisory,
Advisory Services,
Catalyst

11:20 AM - 12:10 PM

Establishing ERG Foundations

Join this cohort of leaders in the early stages of the ERG journey. In this hands on session, you'll learn about fundamental priorities, and how to align, measure and focus on goal setting.



Todd Baker

Senior Advisory,
Advisory Services,
Catalyst

11:20 AM - 12:10 PM

Redefining Goals and Identifying Opportunities

Collaborate with established or mature ERGs to understand how you can better integrate and advance your current goals, including stakeholder considerations, revisiting your ERG’s mission and value, and how to best communicate goals.



Sarah Dinolfo
Senior Director,
Advisory Services,
Catalyst

12:25 PM - 12:40 PM

Fireside Chat

In this conversation hear from Betty Vasquez-Stevens, Head of Internal Controls over Financial Reporting, Guardian Life Insurance Company and LaVida! (Latinx/Hispanic Advocates: Voices for Integrity, Diversity, and Advancement) Guardian ERG Leader sharing her story of how she and others founded the ERG and how much progress they have made in under 2 years partnering with the Guardian community and business.



Betty Vasquez-Stevens
Head of Internal Controls
Over Financial Reporting,
Guardian Life Insurance

12:40 PM - 1:20 PM

Panel Discussion & Audience Q&A

Hear from ERG senior leaders at BMO as they discuss their to best-in-class practices on setting and meeting goals. More specifically, they will share details about the goals they’ve set within their GenBMO (bringing together multigenerational employees) employee resource group. Takeaways include ideas on measuring progress, how GenBMO leaders have successfully set and attained their goals, and reasons for defining (or redefining) ERG roles.



Souroth Chakrabarti
Senior Advisor,
Employee Resource
Groups, BMO



Laurie Carson
Director, Deposit
Operations,
GenBMO Co-Chair,
BMO



Jeff Harrell
Director, Delivery,
NACB Client Service &
Implementations,
GenBMO Co-Chair,
BMO