HOW TO LEAD A SUCCESSFUL ERG

AHRC Nassau
Citizens Options Unlimited
Brookville Center for Children Services

AHRC NASSAU

BCCS Brookville Center for Children's Services

Citizens Options Unlimited

TABLE OF CONTENTS

TABLE OF CONTENTS

TABLE OF CONTENTS

01 INTRODUCTION

Employee Resource Groups (ERGs) are voluntary, employee-led groups that promote a sense of belonging, community, and career development within an organization.

First established in the 1960s, ERGs originated from efforts by Black workers at Xerox who organized to address race-based tensions in the workplace. Over time, ERGs have evolved to include various identity groups such as women, LGBTQIA+ community, employees with disabilities, and other underrepresented identities.

Today, ERGs are a vital part of creating an inclusive workplace, supporting professional development, promoting diversity, and advancing organizational goals. They offer a platform for employees to share experiences, develop leadership skills, and help shape organizational culture by fostering inclusion and providing insight into DEI strategies.

ERG interest has been established in our organization, and now it's essential to ensure they thrive. The following guide outlines key steps for effective management and leadership so that ERGs not only achieve their goals but also create lasting impact.
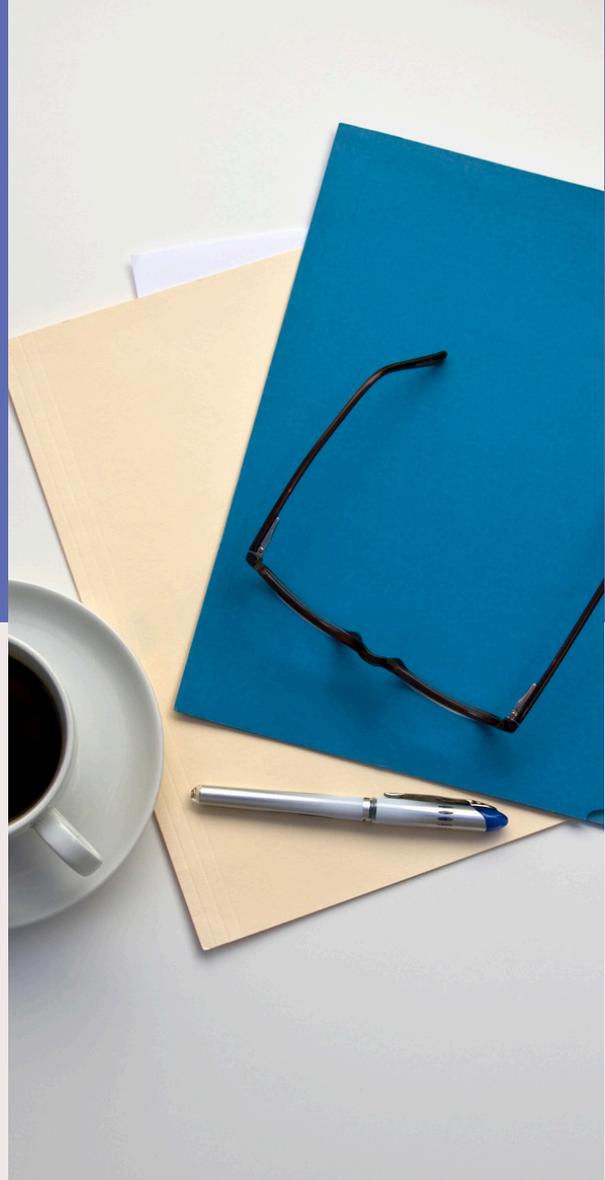
DEI Office Contact Information

DEI Officer

Sarah Gonzalez Noveiri, Ph.D.
Pronouns They/them/she/hers
snoveiri@ahrc.org
T: 516.626.1000, ext. 1210
C: 516.242.1720

Workforce Equity & DEI Specialist

Tolulope Elizabeth Adenekan, Ph.D.
Pronouns: She/her
eadenekan@ahrc.org
T: 516.626.1000, ext. 1044
F: 516.686.4408

STEPS CHECKLIST

- Review ERG related policies

- Develop your Charter
    - What is your group's purpose?
        - Include goals and objectives
    - What is your ERG's Mission Statement?
    - What is your Leadership Structure?
    - How is your Leadership Elected?
    - How long are Leadership Terms?
    - How will you recruit members?
    - How will you Communicate to Members?
    - Recruit 10 employees to sign your Charter

- Submit Charter Application to the DEI Officer.

- Upon receipt of Charter Approval Form, develop a meeting schedule between the ERG Leader and the DEI Officer (quarterly or bi-quarterly).

- Develop an annual meeting with EMT.

02 EFFECTIVE LEADERSHIP AND GOVERNANCE

Establish a Leadership Team

- **Leadership Roles:** Define specific roles such as ERG Chair, Vice-Chair, Secretary, Events Coordinator, Communications Lead, and Treasurer. This division of labor helps ensure that no one person bears all responsibilities, and each aspect of the ERG's operation is well-managed.
- **Leadership Rotation:** Set up a clear process for rotating leadership positions, such as yearly elections or term limits, to give more members opportunities to lead and keep the group energized with fresh ideas.
- **Develop Leadership Skills:** Offer training and development for new leaders. Ensure they understand both the mission of the ERG and organizational goals. Leadership skills development can include conflict resolution, meeting facilitation, and decision-making training.

Tip: Rotate subcommittees based on interests and areas of focus (e.g., advocacy, community outreach, professional development) to empower members to lead in different capacities.

Leverage Senior Leadership Sponsors

- **Sponsor's Role:** Senior Leadership sponsors should not only advocate for the ERG but also mentor its leaders, provide insight into organizational priorities, and help secure resources. Sponsors are critical for ensuring the ERG's alignment with business goals.
- **Engagement:** Hold regular meetings with sponsors to update them on ERG activities, seek advice on strategic decisions, and ensure they can advocate for the group at higher levels.
- **Visibility:** Encourage sponsors (Senior Leadership) to attend key ERG events, and ensure they mention ERG activities during meetings to keep ERG efforts visible and supported.

Best practice: Ensure the sponsor's involvement goes beyond ceremonial support—engage them in strategic discussions, such as how ERGs can influence organizational policies.

Define Leadership Accountability

- **Create a Leadership Accountability Matrix:** Clearly assign responsibilities to each leadership role and subcommittee. For example, the Events Coordinator should oversee logistics, budget, and execution of events, while the Secretary maintains records of meetings and follows up on action items.
- **Regular Reporting:** Leaders should report on progress toward goals during regular ERG meetings. This ensures transparency and keeps members engaged in the group's progress.
- **Peer Accountability:** Encourage peer accountability by fostering a culture of collaboration, where members hold each other accountable for their contributions.

Develop a Group Charter

Components of a Charter:

- **Mission and vision statements:** Define the ERG's mission and vision, reflecting its core purpose and long-term aspirations.
- **Objectives and goals:** Clearly outline the ERG's short-term and long-term goals. Ensure these objectives are specific, measurable, and aligned with the organization's strategic priorities.
- **Membership criteria:** Specify who can join the ERG, including any eligibility requirements and expectations for member participation.
- **Governance and decision-making:** Detail the governance structure, including leadership roles, decision-making processes, and meeting schedules. Ensure transparency and accountability in all ERG activities.
- **Code of conduct:** Establish guidelines for member behavior and interaction to foster a respectful and inclusive environment.

03 COMMUNICATION LINES TO THE DEI OFFICE AND THE EXECUTIVE TEAM

Establish Quarterly/bi-Quarterly Meetings

For an Employee Resource Group (ERG) to effectively communicate with the DEI Office, it's crucial to establish a clear line of communication through the designated ERG president/Chair/Founder who acts as a direct point of contact for regularly sharing updates, concerns, and initiatives, ensuring open dialogue and alignment with organizational goals; this can be achieved through scheduled meetings, written reports, and occasional presentations to the DEI Officer, and an annual meeting with the Executive Team.

Communication Channels

1. **Dedicated Email Alias for ERGs**
   - Create a specific email alias for ERG leaders to directly communicate with the executive team (e.g., ERGname-president@ahrc.org).
   - Use this for sharing updates, sending meeting agendas, or raising concerns.
2. **Collaboration Platform**
   - Utilize a platform like Microsoft Teams, or another internal tool to create a shared workspace for ERG leaders and the DEI Office.
   - Set up channels for:
     - General Updates: ERG highlights and initiatives.
     - Action Items: Discussions on actionable requests or support needed.
3. **Progress Reports**
   - Implement a standard reporting format that ERG leaders submit on a scheduled basis (e.g. quarterly) to the DEI Office, and a single annual report to the Executive Team.
   - Reports can include key achievements, challenges, and resource requests.

Meeting Scheduling Contact Information for the Executive Office

Executive Assistant to the CEO

Seon O. Bailey
Pronouns She/Her
sebailey@ahrc.org
T: 516.626.1000, ext. 1105
F: 516.626.1493

Meeting Scheduling Contact Information for the DEI Office

DEI Officer

Sarah Gonzalez Noveiri, Ph.D.
Pronouns They/them/she/hers
snoveiri@ahrc.org
T: 516.626.1000, ext. 1210
C: 516.242.1720

Workforce Equity & DEI Specialist

Tolulope Elizabeth Adenekan, Ph.D.
Pronouns: She/her
eadenekan@ahrc.org
T: 516.626.1000, ext. 1044
F: 516.686.4408

04 RECRUIT YOUR MEMBERS

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

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

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

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

Some strategies to Consider

- Ask to be included in different departmental/management meetings so you can promote membership opportunities.
- Partner with HR and/or data experts to export the demographic components of departments so you can personally contact your target audience.
- Organize recruiting events
  - At Different Organizational Buildings
  - Homes
  - Schools
- Include your ERG membership application during onboarding.
- Create Social Media Pages to recruit and update your audience on progress.

05 GOAL SETTING AND STRATEGIC PLANNING

Tip: Involve the broader ERG membership in strategic planning sessions to ensure a variety of perspectives are represented.

Create a Strategic Plan

- **Long-Term Vision:** Develop a strategic vision that spans 3-5 years, outlining what the ERG wants to achieve. This could include long-term goals such as influencing company policies, building a robust mentorship program, or driving significant organizational DEI changes.
- **Annual Planning:** Break down the long-term vision into yearly objectives. This could include membership growth, community outreach, internal education, or policy advocacy within the organization.
- **Budget Planning:** Align your strategic plan with a budget to be proposed to the Executive Team. Identify the initiatives that require financial backing (e.g., guest speakers, training programs) and allocate your proposed resources accordingly.

Set SMART Goals

- **Specific:** Clearly define what the ERG wants to achieve, whether it's increasing membership, hosting specific types of events, or launching a mentorship program.
- **Measurable:** Set metrics to track progress (e.g., number of events, attendees, satisfaction ratings from post-event surveys).
- **Achievable:** Ensure the goals are realistic based on available resources and time commitment of members.
- **Relevant:** Align ERG goals with the organization's DEI strategy. This might include focusing on retention of underrepresented employees or leadership development.
- **Time-bound:** Set deadlines for achieving each goal to maintain momentum and create accountability.

Example: "Launch a mentorship program by the end of Q3, pairing at least 10 junior employees with senior mentors."

Purpose Statement

- **Identify core values:** Encourage leaders to align the ERG's purpose with the organization's broader mission and values. This alignment ensures that the ERG supports the organization's strategic goals while addressing the unique needs of its members.
- **Exercise for purpose statement:** Conduct a brainstorming session where leaders identify key themes and values. For instance, the Families ERG might focus on work-life balance, shared experiences, and career growth. Have leaders draft multiple versions of a purpose statement to refine the message.

Track Progress

- **Data Collection:** Use surveys, membership data, and participation metrics to track progress. Regularly report this data to ERG members and sponsors.
- **Qualitative Feedback:** Collect qualitative feedback through member interviews or focus groups to understand deeper sentiments about how the ERG is progressing and what can be improved.
- **Quarterly Reviews:** Conduct quarterly reviews of progress toward goals. Adjust the strategic plan as needed to reflect changes in priorities or unforeseen challenges.

Tip: Use dashboards to visually track progress and share updates with the entire ERG membership.

pn

06 MEMBER ENGAGEMENT AND INCLUSION

Promote Active Participation

- **Create Multiple Engagement Channels:** Offer various ways for members to participate. This could include in-person meetings, virtual events, Slack groups, or collaborative projects. Not all members will engage in the same way, so diversity in engagement is key.
- **Ownership Opportunities:** Encourage members to take ownership of specific initiatives, such as planning events, leading discussions, or managing outreach. This will help members feel more invested in the ERG.
- **Clear Expectations:** Clearly communicate the level of commitment expected from members, whether it's attending a minimum number of meetings or contributing to specific projects.

Ensure inclusion within the ERG

- **Intersectionality:** Acknowledge the diverse experiences within each ERG. For example, ensure that a Women's ERG includes the voices of women of color, LGBTQ+ women, and women with disabilities.
- **Safe Spaces:** Provide safe spaces for members to discuss their experiences without fear of judgment or retaliation. This might include closed-group discussions or facilitated conversations with the DEI Officer.
- **Allyship:** Encourage allies to participate in the ERG by educating them on how to support marginalized groups respectfully. Allies can help amplify the group's mission without centering themselves in the conversation.

Example: A Women's ERG may hold a panel that includes women of different races, ages, and sexual orientations to discuss how their experiences in the workplace differ and intersect.

Host Regular Meetings

- **Event Calendar:** Develop an annual calendar of events, balancing between social, educational, and professional development activities. Vary event formats (e.g., panels, workshops, networking mixers) to appeal to different members.
- **Thematic Events:** Organize events around significant cultural moments (e.g., Black History Month, Pride Month).
- **Virtual Engagement:** For remote or hybrid employees, ensure virtual events are accessible and interactive. Virtual coffee chats, webinars, and online networking sessions can engage employees in different locations.

Tip: Ensure events are accessible to all employees, considering different locations, disabilities, and other factors that might limit participation.

Host Regular Meetings

- **Event Calendar:** Develop an annual calendar of events, balancing between social, educational, and professional development activities. Vary event formats (e.g., panels, workshops, networking mixers) to appeal to different members.

07 PROFESSIONAL DEVELOPMENT AND MENTORSHIP

Focus on Growth Opportunities

- **Leadership Development Workshops:** Host leadership development sessions specifically for ERG members, focused on areas such as negotiation, public speaking, and conflict resolution.
- **Internal Speakers:** Invite senior leaders from within the company to share their career journeys, challenges they've faced, and how they overcame them. This provides valuable learning and inspiration for ERG members.
- **External Experts:** Engage external experts to lead workshops or talks on leadership, mental health for historically marginalized communities, or I/DD trends.

Example: Organize a quarterly leadership series featuring C-suite executives discussing their leadership journeys and how ERGs have contributed to their success.

Create Mentorship Programs

- **Structured Mentorship:** Implement formal mentorship programs where members are paired based on career goals, shared interests, or professional backgrounds. Ensure mentorship goals are defined and tracked.
- **Reverse Mentorship:** Consider reverse mentorship programs where junior ERG members mentor senior leaders to educate them on the challenges faced by underrepresented groups in the workplace.
- **Peer Mentoring:** Encourage peer mentoring, where members at similar career stages support each other's professional development.

Tip: Provide guidance on how to structure mentoring relationships, including goal-setting and regular check-ins.

08 COLLABORATION AND CROSS-ERG INITIATIVES

Cross ERG Collaboration

- **Shared Events:** Collaborate with other ERGs to host joint events that address intersectional issues. For example, a Pride ERG could partner with a Mental Health ERG to discuss LGBTQ+ mental health challenges in the workplace.
- **Collective Advocacy:** ERGs can work together to advocate for policy changes within the organization, such as inclusive parental leave policies or adjustments to performance evaluations to reduce bias.
- **Cross-ERG Learning:** Create opportunities for ERG members to learn from one another. For instance, a workshop on allyship might involve multiple ERGs sharing perspectives on how to be effective allies in various contexts.

Example: An ERG for employees with disabilities could partner with a Veterans ERG to discuss workplace accommodations and how they benefit different groups.

Organization-Wide Initiatives

- **Input on DEI Policies:** ERGs can play a consultative role in shaping company-wide DEI policies, helping the DEI Office understand the unique needs of different groups.
- **Training and Education:** ERGs can collaborate on designing and delivering group specific training programs for the broader organization, helping to raise awareness and foster inclusive behavior across the organization.

09 BUDGET AND RESOURCE MANAGEMENT

Manage ERG Budget

- **Detailed Budget Planning:** Develop an annual budget proposal that covers event costs, external speakers, training programs, and any other initiatives. Ensure transparency by sharing how the funds are being allocated with the entire group. Submit your proposal to the Executive Team for approval.
- **Sponsorship Opportunities:** Seek additional funding or sponsorship from external organizations for specific events or causes. This can supplement the internal budget and allow for larger or more impactful initiatives.
- **In-Kind Resources:** Leverage in-kind resources such as meeting spaces, technology tools, or partnerships with external organizations that may offer support in exchange for visibility or recognition.

Tip: Conduct a cost-benefit analysis after each event to ensure the ERG is using resources efficiently.

Leverage Internal and External Resources

- **Internal Support:** Work with departments to promote ERG activities and ensure strong internal visibility. HR and the DEI Office can also assist in tracking metrics like employee satisfaction and retention rates.
- **External Partnerships:** Build relationships with external organizations (e.g., nonprofits, community groups) that align with the ERG's mission. These partnerships can provide networking opportunities, sponsorship, or expert speakers.

10 PROMOTE ERG SUCCESSES AND IMPACT

Report and Communicate Achievements

- **Annual ERG Impact Report:** Create a yearly report detailing key activities, milestones, and outcomes. Include data on event participation, membership growth, feedback from members, and alignment with the organization's DEI goals.
- **Internal Marketing:** Collaborate with the company's internal communications team to share success stories, highlight member achievements, and promote the ERG's work through newsletters, or intranet platforms.
- **Share Success with Leadership:** Present ERG achievements to senior leadership to demonstrate the tangible impact of ERGs on the company's culture, retention, and DEI strategy.

Tip: Regularly showcase ERG member achievements in internal channels to foster a sense of pride and belonging among members.

Use Data to Demonstrate Impact

- **Track Quantitative Metrics:** Track attendance at events, membership growth, and survey feedback to quantify ERG success. Use this data to improve future programming.
- **Qualitative Impact:** Collect success stories from members on how the ERG has positively impacted their careers, professional development, or sense of belonging. This can be shared in organization-wide meetings or reports.

Tip: Use both qualitative and quantitative data to create a comprehensive picture of the ERG's influence on company culture.

Brand Development

- **Visual identity:** Guide leaders in creating a cohesive visual identity, including a logo, color scheme, and tagline that represent the ERG's mission and values. Ensure that these elements align with the company's overall branding guidelines to maintain consistency.
- **Messaging:** Develop key messages that reflect the ERG's purpose and goals. These messages should be clear, concise, and resonate with both current and potential members.

Promotion

- **Internal marketing:** Use internal communication channels such as newsletters, intranet, and social media to promote the ERG. Highlight success stories, upcoming events, and member achievements to generate interest and engagement.
- **External visibility:** If appropriate, share the ERG's initiatives and successes on external platforms like the organization's website or LinkedIn. This can enhance the company's reputation as an inclusive and supportive workplace.

11 ENSURE SUSTAINABILITY

Succession Planning

- **Mentorship for Future Leaders:** Create a leadership pipeline within the ERG by offering mentoring, leadership training, and shadowing opportunities to members interested in stepping into leadership roles.
- **Leadership Documentation:** Maintain detailed documentation of all ERG processes, including meeting notes, event planning procedures, and key contacts. This ensures that when leadership transitions occur, there is continuity in how the ERG operates.
- **Elections and Term Limits:** Set clear term limits for leadership roles, and hold elections to ensure fresh leadership and ideas. This promotes engagement and encourages more members to take leadership roles.

Tip: Create a "Leadership Handbook" that can be passed down to new leaders, ensuring consistency in how the ERG operates.

Long-term Vision

- **Alignment with Organizational DEI Strategy:** Continuously align the ERG's long-term goals with the organization's evolving DEI strategy. ERGs should not exist in isolation but should play an active role in shaping the company's DEI direction.
- **Sustain Momentum:** As the ERG matures, focus on sustaining engagement through varied programming, adapting to new challenges, and addressing the evolving needs of members and the broader organization.
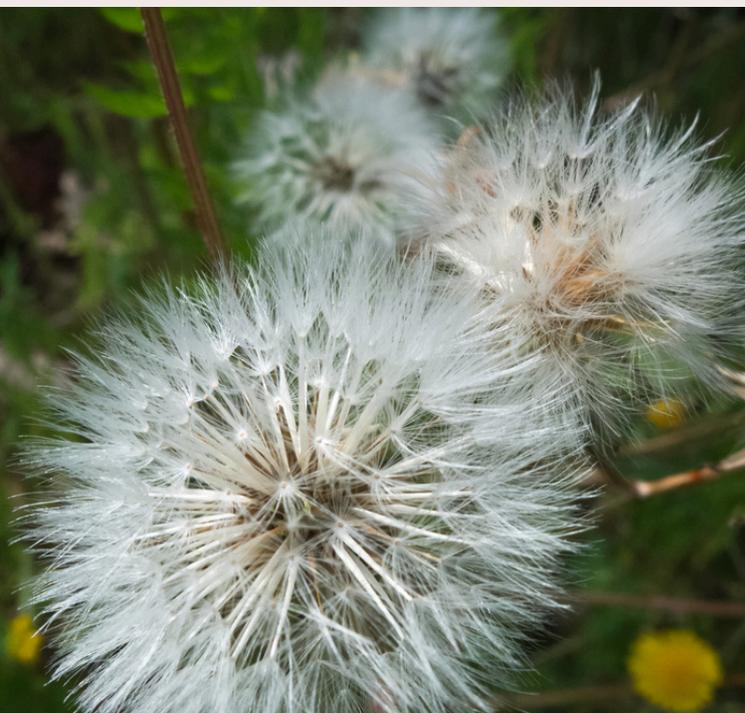
10 RESOURCE VIDEOS

- Introduction to Employee Resource Groups, by The Social Impact Show. Click Here

- How to Grow and Develop Employee Resource Group Leaders, by The Social impact Show. Click Here

- Mastering ERG Programs: Strategies for ERG Leaders Who Want to Succeed, Click Here

- ERG Leadership: Innovative Practices for Success, by Hispanic Association on Corporate Responsibility. Click Here

11 CONCLUSION.

Effectively managing ERGs requires strong leadership, clear goals, member engagement, and consistent tracking of impact. By following the guidelines above, ERGs have the chance to drive meaningful change within our organizations, create lasting value for their members, and contribute to a more inclusive and equitable workplace culture.

12 APPENDIX

ERG Charter Template

Note: If needed please contact the DEI Officer for the Word document or PDF or if interested in more templates and questions.

Employee Resource Group (ERG) Charter Template

NOTE: This template is meant as an example, please feel free to change and/or remove anything that does not serve the purpose of the ERG Charter.

1

APPENDIX

ERG Charter Template

Note: If needed please contact the DEI Officer for the Word document or PDF or if interested in more templates and questions.

Employee Resource Group (ERG) Charter Template

Mission Statement

Organization Mission and Vision Statement: [Insert Organization's mission statement – for example AHRC Nassau].

ERG Mission and Vision Statement: [Insert ERG mission statement].

ERG Purpose & Focus: (NOTE: These are only examples)

Our Group is focused on four pillars: Culture, Community, Organizational Alignment, and Career [insert your ERG Pillars]:

- **Culture:** Educating and raising awareness for internal and external issues facing our community.
- **Community:** Fostering inclusion for our members by providing them with safe spaces and opportunities for networking and fellowship.
- **Organizational Alignment:** Supporting company business goals by partnering with different internal teams.
- **Career:** Creating opportunities for professional development for members via events, workshops, and mentorship.

2

APPENDIX

ERG Charter Template

Note: If needed please contact the DEI Officer for the Word document or PDF or if interested in more templates and questions.

Employee Resource Group (ERG) Charter Template

Membership Guidelines

Membership Guides: [Insert ERG membership guidelines].

ERG Member Guidelines Example:

[ERG Name] is open to all [Insert group descriptor] identifying employees at [Organization] as well as anyone who identifies as an ally for the community. Participation in group events and programs is voluntary.

To join the ERG, an employee must [insert a brief sentence on how new members can contact you].

Important Questions to Ask about Membership Guidelines:
- How will you define membership? Is there a form that employees need to fill out?
- What does it mean to participate?
- Are there any expectations for interaction? What behaviors do you encourage? What behaviors will be reported to HR?
- What is the time commitment for joining an ERG?

3

c

APPENDIX

ERG Charter Template

Note: If needed please contact the DEI Officer for the Word document or PDF or if interested in more templates and questions.

Employee Resource Group (ERG) Charter Template

Leadership Structure

Note: depending on the maturity level of your ERG, you might have a bigger or smaller leadership team. You may also have multiple people sharing the same role (i.e. Event Co-Leads).

*Roles that are "must-haves" in any ERG

*President/Founder**

The President is the overall lead for the ERG. This person reports to the DEI Officer about the status of our group. This person also tracks and reports on the progress of our group towards our overall goals.

*Senior Leadership Sponsor**

The Senior Leadership Sponsor advocates for our group to organizational leadership. This person serves as a mentor and advisor to our overall ERG and to our ERG leadership team.

Treasurer

This person is responsible for tracking group expenses and reporting expenses to our DEI Office on a quarterly basis.

Membership Lead

The Membership lead is responsible for recruiting employees to join and participate in the ERG. This person is also responsible for tracking and reporting on membership metrics.

Events Lead

The Events Leads is responsible for planning events for our ERG. This person is responsible for planning events in accordance with our group goals, gathering feedback on those events, communicating expenses with the Treasurer, and reporting on the success of events to the President.

Community Lead

This person is responsible for fostering community within our group. This person will support the Events Lead in planning social events, handle crisis situations if/when they arise and generally act as a community manager for our ERG.

4

APPENDIX

ERG Charter Template

Note: If needed please contact the DEI Officer for the Word document or PDF or if interested in more templates and questions.

APPENDIX

ERG Charter Template

Note: If needed please contact the DEI Officer for the Word document or PDF or if interested in more templates and questions.

Employee Resource Group (ERG) Charter Template

Reporting Structure

Note: Your reporting structure will largely depend on the maturity level of your group and your group's goals. Choose the metrics below that match your group's stage.

We capture and report on the following metrics to gauge the success of our group:

- **Overall membership** - the number of people that have joined our ERG.
- **Event registration** - the number of people that sign up for our events.
- **Event attendance** - the number of people that attend our events, whether in-person or virtual.
- **Event NPS** - the average net promoter score (how likely are you to recommend this event to a colleague?) for our events.
- **# of Organizational DEI initiatives supported** - the number of initiatives we've partnered on with various teams at our organization.
- **Mentorship program participation** - the number of our group members that participate in our mentorship program.
- **# of referrals submitted** - the number of employee referrals submitted via our ERG members.