

# After the Dust Settles: Rebuilding Your ERG

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AED CONSULTING LLC



# Welcome & Introductions

- Who we are
  - Ann Dunkin, AED Consulting LLC
  - Stephanie Puentes, Equity Action LLC
- Context for this work
  - Many ERGs have been adversely affected
  - Intent of today's workshop is to provide tools

# ERG Assessment Tool

	Still Active and Available (name & role)	Gone or Inactive (name & role)	Ideas to replace
<b>Leadership</b>	<i>Ann – ERG Chair Stephanie - Webmaster</i>	<i>Terry – Finance Chair</i>	<i>Ask Adam, who used to work in Finance, for recommendations.</i>
<b>Allies</b>	<i>Mary</i>	<i>Sarah – Coffee Break organizer</i>	<i>Send out request for new organizer in monthly newsletter</i>
<b>Executive Sponsor(s)</b>		<i>Jim</i>	<i>Ask for suggestion for new sponsor</i>

# ERG Assessment Tool

	Still Active and Available (name & role)	Gone or Inactive (name & role)	Ideas to replace
Diversity/HR	<i>Cindy – HR Liaison</i>		
Financial	<i>Local site budgets still intact</i>	<i>Corporate funding for PRIDE Fest no longer available</i>	<i>Request increase from site council Hold a bake sale</i>
Physical (products, meeting rooms, etc)	<i>Imaging Division still willing to give product for PRIDE Fest give away</i>	<i>They sold building 20 – auditorium no longer available for meetings</i>	<i>Use large conference room in building 6</i>

# Rebuilding Your Alliances

- Three constituencies
  - Allies
  - Executive Sponsors
  - Diversity/HR Function
  
- Four step process that will work for all constituencies

# Rebuilding Your Alliances

## A Four Step Process

- Step 1: Raising Awareness
- Step 2: Identifying Allies & Gathering Support
- Step 3: Formalizing Support
- Step 4: Leveraging Support

# Step 1: Raising Awareness

- Take every opportunity to educate
  - Provide data
    - Benchmarking data (O&E, HRC, Witeck & Combs)
    - LGBT facts (Taxation info, Marriage Rights)
  - Build an emotional connection
    - Videos
    - Interactive experiences (Reader's Theater, Can We Talk?)
  - Build Skills
    - Building Bridges
    - Safe Space Training
- Use existing allies to get the message out

# Step 2: Identifying Allies & Gathering Support

- Engage LGBT network and current allies to identify more allies
  - Use networking and cross ERG meetings to identify potential allies
  - Encourage your allies to share their stories and speak in support of the LGBT community
- Collaborate with other groups on events such as diversity fairs and joint speakers to create a safe space for allies
- Build an emotional connection with allies through social activities and by sharing personal stories
- Provide ongoing education for your allies
  - External Speakers
  - Reciprocal Mentoring and ‘teachable moments’
  - Experiential Diversity Training

# Step 3: Formalizing Support

## Allies:

- Ask allies to officially join your ERG

## Sponsors:

- Ask executive allies to step into sponsor roles
- Types of sponsors:
  - Sponsors for local groups.
  - “C” level sponsor for the group at the corporate level
  - Executive advisory boards in large companies

## HR/Diversity Functions:

- Use allies in the HR or Diversity organization to work to create or formalize a relationship with your ERG

# Step 4: Leveraging Support

## Ask Allies to:

- Join committees and take leadership roles
- Represent the ERG publicly
- Help create a strategic plan for the group

## Ask Sponsors to:

- Serve as advisors. Ask them how to work most effectively within the new organization's structure.
- Make introductions to other executives and clear roadblocks

## HR/Diversity to:

- Help you understand the new organizational priorities for ERGs and diversity
- Help you understand how they are measured

# Aligning Your Objectives

- Review/Revise Strategic Plan and Mission/Charter (or create one)
  - A plan enables you to:
    - Obtain resources & ally support
    - Engage your members
  - Review your current plan
  - Adjust plan to meet new constraints – people, financial, physical resources
  - Align with new corporate objectives and political realities

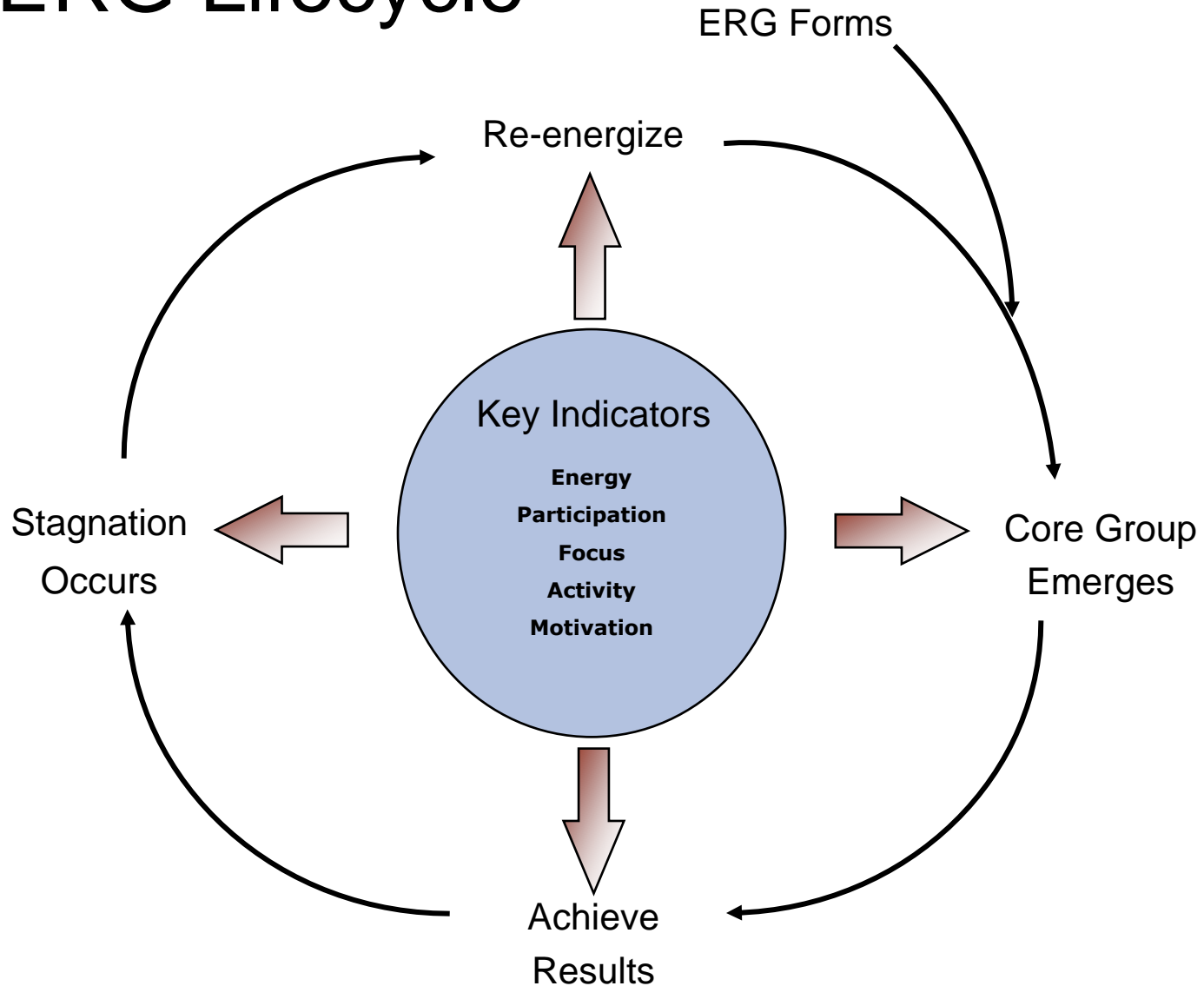
# Aligning Your Objectives

- Share your new plan with sponsors, D&I and HR
  - Gather their feedback and revise plan
  - Make sure plan reflects what they need from the ERG
  - Obtain commitments of support and resources to meet objectives

# Reenergizing Your Base

- ERG Lifecycle
- Lessons Learned

# The ERG Lifecycle



# Lessons Learned

- social focus
- avoid secrecy
- recognition is important
- be creative with what you have, look for new ways to do things
- avoid status quo, energy killer
- don't focus on just one thing

# Lessons Learned

- keep group open to new people (avoid cliques)
- be open to allies
- use PRIDE events as marketing opportunities
- tag along with parts of company that are doing this well
- expand beyond the U.S. if you haven't already
- be inclusive (LGBTQI) and work on each other's issues

# Five Things You Can Do Right Now

- All member meeting – share what they learned in this workshop and at the summit
- Finish your assessment
- Start recruiting the new people you have identified and involve them in next steps
- Social Activities
  - Coffee break (easy)
  - Lunches (harder)
- Set up a social network (FaceBook, Ning, internal site) to connect with people who work remotely, global folks and local folks who prefer to stay at home

# Contact Info

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