



Welcome to Out & Equal's April Town Call

Be sure to dial into the
audio portion of the conference

1-866-740-1260 (U.S. & Canada)

Participant Access code: 6946500

Your line will be muted, you are listening to:

["Shaping Lesbian, Gay, Bisexual and Transgender Workplace Equality,"](http://www.outandequal.org/2009SummitVideo)

<http://www.outandequal.org/2009SummitVideo>



Stories from the Street: ERGs in Times of Corporate Change



Presenters:

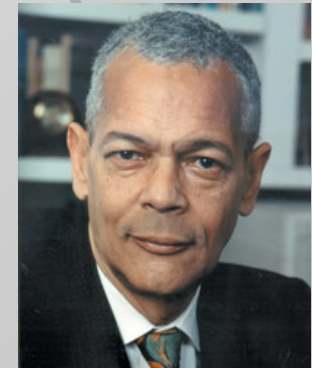
Stephen Gould, Lisa Mazzola, Ann Dunkin

Moderator: Morgan Green



Announcements

- ◎ **2010 Out & Equal Advocacy Award winner** – Julian Bond, Chairman Emeritus of the NAACP
- ◎ **Oct 5-8 – Annual Summit** – Los Angeles (deadline for Workshop RFPs/Outie awards is April 30!)
- ◎ Check www.outandequal.org for more info on upcoming Out & Equal University, Regional Affiliates, ERGs and CareerLink



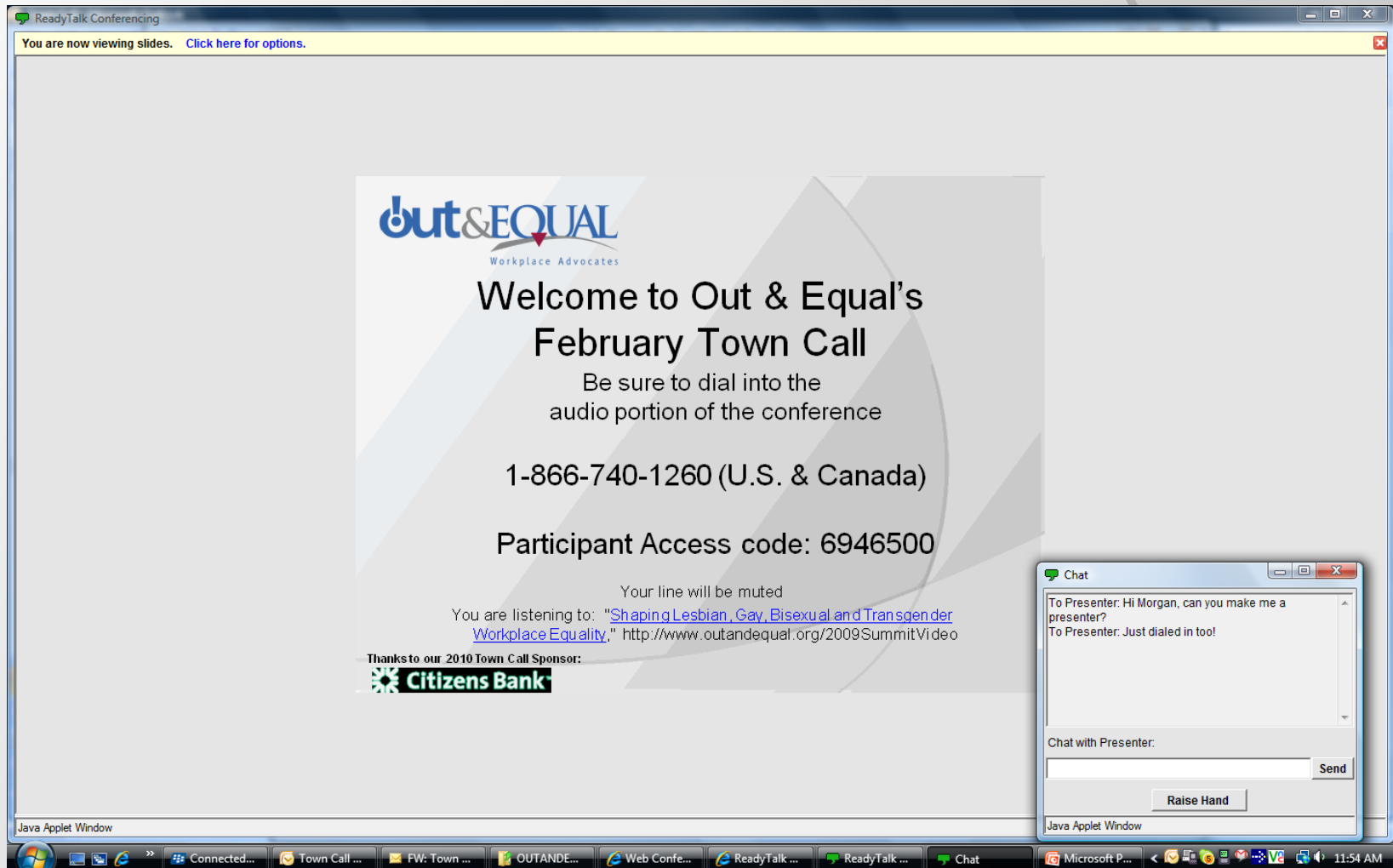
ReadyTalk Features

The screenshot shows a ReadyTalk Conferencing window. On the left is a chat area with a message from the chairperson: "Welcome to the webinar!". Below the chat is a text input field containing "Great to be here today" and a "Send" button. A "Raise Hand" button is located below the chat area. On the right is a presentation slide titled "Using ReadyTalk Features" with the following bullet points:

- Line are muted – when directed, you can use *7 to ask a question, *6 to return to mute
- Raise your hand – bottom left of screen
- Chat Functions – bottom left of screen
- Cut & Paste – only in chat boxes, use CTRL C to Copy and CTRL V to paste (any links used in the webinar will be emailed to you after the course)


The Windows taskbar at the bottom shows several open applications: "Other training", "ReadyTalk Conferen...", "ReadyTalk - Confere...", "Microsoft PowerPoi...", and "ReadyTalk Conferen...". The system clock shows 6:45 PM.

ReadyTalk Full Screen



ReadyTalk Conferencing

You are now viewing slides. [Click here for options.](#)


Workplace Advocates

Welcome to Out & Equal's February Town Call

Be sure to dial into the audio portion of the conference


1-866-740-1260 (U.S. & Canada)

Participant Access code: 6946500

Your line will be muted

You are listening to: "[Shaping Lesbian, Gay, Bisexual and Transgender Workplace Equality](#)," <http://www.outandequal.org/2009SummitVideo>

Thanks to our 2010 Town Call Sponsor:



Java Applet Window

Chat

To Presenter: Hi Morgan, can you make me a presenter?
To Presenter: Just dialed in too!

Chat with Presenter:

Java Applet Window

Microsoft P... 11:54 AM

Stories from the Street: ERGs in Times of Corporate Change Overview



Presenter:
**Stephen Gould, Associate
Director of NETWORKS!, O&E**



Many ways to erg

- ⦿ ERGs, BRGs and Affinity Groups
- ⦿ Achieving value
- ⦿ A matrix of approaches

ERG Toolkit Matrix

ERG Lifecycle Phases

	<i>Beginner</i>	<i>Intermediate</i>	<i>Advanced</i>
	Startup	Growth	Sustainment
ERG Management & Structure	Launch	Build	Evolve
ERG Value	Identify Business Case	Measure/Refine Business Case	Increase ROI
Membership	Member Recruitment	Member Engagement	Energized Membership
Programming	Define/Prioritize	Execute	Evaluate/Expand
Internal Policy & Climate	Assess	Plan	Execute
External Issue Advocacy	Assess	Plan	Execute

Stories from the Street: ERGs in Times of Corporate Change

Impact of Business Changes on ERGs



Presenter:

**Lisa Mazzola (Vice President
Specialty Markets, Wells Fargo
Company)**



Embracing the Diversity within ERGs

- ◎ Beyond LGBT
 - Members of all ERGs share the same passion in different ways
 - Know your ERG network, Understand their Goals, their audience and their resources
- ◎ Allies and Leaders need to be engaged as part of the team
 - Working with multiple ERGS as a team may help bring additional awareness and collaboration between allies as well as leaders
 - Allies, Mentors and Organizations outside the company play an important role



Changing Culture and Moving Forward with ERGs

- ⦿ Centralized - to be or not?
 - Being Centralized can be a benefit for collaboration and resources
 - Rebuilding and renewing
 - New structure can bring new ideas, change requires patience
 - Starting from the middle may be a good idea
 - Allies and Partnering ERGs can help in renewing energy



Stories from the Street: ERGs in Times of Corporate Change Impact to LGBT ERGs

**Presenters:
Stephen Gould
Ann Dunkin
Lisa Mazzola**

ERG Mergers



Presenter:
Ann Dunkin, Principal, AED Consulting LLC



Merger Participants



- ◎ Two Fortune 500 corporations.



Merger Participants



- ⦿ Two Fortune 500 corporations.
- ⦿ One participant had a well established, large, decentralized ERG active throughout the US.

Merger Participants



- Two Fortune 500 corporations.
- One participant had a well established, large, decentralized ERG active throughout the US.
- One participant had a smaller, centralized ERG with a few regional groups. This company was more conservative and the ERG struggled for recognition.

Merger Landscape



- ⦿ Outspoken support of ERGs by CEO of the combined company.
- ⦿ Different corporate cultures – one very progressive, one very conservative.
- ⦿ Controversial and divisive merger. Many, including some ERG members, opposed the merger.

Notification & Early Actions



- ◎ Both ERGs learned about the merger when it was announced publicly.

Notification & Early Actions



- ⦿ Both ERGs learned about the merger when it was announced publicly.
- ⦿ Representatives from each company contacted others immediately until the leaders of the groups connected.

Notification & Early Actions



- ⦿ Both ERGs learned about the merger when it was announced publicly.
- ⦿ Representatives from each company contacted others immediately until the leaders of the groups connected.
- ⦿ ERG leaders used caution speaking during the merger period.

Notification & Early Actions



- Both ERGs learned about the merger when it was announced publicly.
- Representatives from each company contacted others immediately until the leaders of the groups connected.
- ERG leaders used caution speaking during the merger period.
- The company that had a decentralized ERG defaulted to the group located near corporate taking the lead for ERG merger discussions.

Consolidation



- Once the Merger was official, the two groups began formal discussions
- Agreements
 - the decentralized structure was selected, but a central leadership committee was also added, taking the best of both models.

Consolidation



- Once the Merger was official, the two groups began formal discussions
- Agreements
 - the decentralized structure was selected, but a central leadership committee was also added, taking the best of both models.
 - the smaller group's leadership team became leadership for a new local group

Consolidation



- Once the Merger was official, the two groups began formal discussions
- Agreements
 - the decentralized structure was selected, but a central leadership committee was also added, taking the best of both models.
 - the smaller group's leadership team became leadership for a new local group
 - Key decision: new name for the combined group to create a new identity



Opportunity



- Employees and ERG leaders in the more conservative company were able to be more out and more involved in ERG events.

Opportunity



- Employees and ERG leaders in the more conservative company were able to be more out and more involved in ERG events.
- New awareness of trans issues brought into the more established group by the younger group, which had several active trans members. This became a key part of the group's agenda, resulting in corporate policy changes.

Opportunity



- Employees and ERG leaders in the more conservative company were able to be more out and more involved in ERG events.
- New awareness of trans issues brought into the more established group by the younger group, which had several active trans members. This became a key part of the group's agenda, resulting in corporate policy changes.
- New central leadership team enabled the combined organization to tackle issues and projects corporation-wide, resulting in major initiatives such as corporate Pridefest support.

Opportunity



- Employees and ERG leaders in the more conservative company were able to be more out and more involved in ERG events.
- New awareness of trans issues brought into the more established group by the younger group, which had several active trans members. This became a key part of the group's agenda, resulting in corporate policy changes.
- New central leadership team enabled the combined organization to tackle issues and projects corporation-wide, resulting in major initiatives such as corporate Pridefest support.
- A central leadership team and increased corporate size enabled the development of new local groups, especially outside the US.

Best Practices Discussion



**Presenters:
Stephen Gould, Lisa Mazzola, Ann Dunkin**



Best Practices

- ⦿ Assess the group's status: take an inventory of resources
- ⦿ Understand the new organizational realities: political, financial, etc.
- ⦿ Reevaluate/Adjust your plans
- ⦿ Build new alliances



How to ask a question...

- ⦿ Online - use chat mode anytime during webinar
- ⦿ Teleconference - dial *7 and ask your question & then *6 to return your phone to mute

Closing Comments





Thank you for your participation!

Please complete the short survey at the end of the call!

Consider a donation to Out & Equal:

<http://www.outandequal.org/about/Donations.asp>

Next Town Call on May 27, 2010

Where are the metrics?

Finding the research to support LGBT workplace equality!

**More questions? Contact Pat Baillie, Associate Director of Training
pbaillie@outandequal.org - 415-694-6521**