



**NATIONAL  
DIVERSITY COUNCIL**

**...a diverse community, a better nation.**

# **Guidebook for Establishing Diversity and Inclusion Employee Resource Groups**

By

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## **NATIONAL DIVERSITY COUNCIL OVERVIEW**

### **Vision and Mission**

#### **History**

The NDC is the first non-profit organization to bring the private, public and non-profit sectors together to discuss the many dimensions and advantages of a multicultural environment. The success of the Texas Diversity Council (established in 2004) served as a catalyst for the National Diversity Council, launched in the fall of 2008. The National Diversity Council is a forerunner of community based, national organizations that champion diversity and inclusion across the country.

#### **Vision**

The vision of the NDC is to promote a nationwide network of affiliated councils to advance diversity and inclusion by transforming our workplaces and communities into inclusive environments where individuals are valued for their talents and empowered to reach their fullest potential.

#### **Mission**

The mission of the NDC is to be both a resource and an advocate. Its goal is to foster an understanding of diversity and inclusion as a dynamic strategy for business success and community well-being. The NDC serves as the umbrella organization which supports our statewide and regional affiliates through various initiatives.

For additional information, please visit us at: <http://www.nationaldiversitycouncil.org>

## **PREFACE**

### **Purpose of the Guidebook**

A solid foundation and the way it is structured are necessary for any part of the organization to carry out its goals and objectives. As such, the organization's D&I function should be set up in order to fulfill its mission effectively. Employee Resource Groups, also known as Affinity Groups or Network Groups, are part of this structure. For our purposes, the term "ERGs" will be used.

*Guidebook for Establishing Employee Resource Groups* is a tool which provides the course of action for establishing ERGs. It defines an ERG, explains its importance and advantages and presents a series of qualities to look for as part of its membership criteria. Additionally, the guidebook includes a sample ERG Charter which outlines its mission, goals and objectives, infrastructure and funding process. It also discusses some best practices to sustain and maintain ERGs. Lastly, it includes a link to the "2011 Global Diversity and Inclusion Benchmarks: Standards for Organizations around the World".

Please note that these are guidelines intended to provide *general* information for establishing ERGs.

## **SECTION I: STRATEGIC USE OF SUPPORT FOR EMPLOYEE RESOURCE GROUPS**

### **Definition & Overarching Goal**

An Employee Resource Group is a group of employees who identify with others similar to themselves. This may include: race, gender, age, sexual orientation, working parents, functional level, disability, veterans, etc. The group comes together and actively engages and gathers around a unifying mission. In most organizations, membership is voluntary and open to all of the organization's employees.

ERGs serve as internal communities, providing personal connections and affiliation for its members and with the organization. The key mission of ERGs is to promote the well-being of the company and develop mutually beneficial relationships between its members and the organization's stakeholders.

### **Importance**

Employees and prospective employees desire to work in an environment that they can fully contribute to and participate in. They look for a workplace that recognizes and respects their uniqueness and is equitable in ensuring their success. ERGs assist the organization in fostering an environment that excels in D&I initiatives by serving as the common voice for employees who identify themselves with a particular diversity dimension. These cohesive groups assist the organization in removing barriers that negatively impact the success of its members. Additionally, ERGs act as internal and external advocates for their organization, thus enhancing its image to all stakeholders.

### **Advantages**

There are several advantages to establishing Employee Resource Groups, some are listed below:

- Employees from mutual dimensions of diversity come together and have an opportunity to connect and build relationships.
- ERGs become the eyes and ears of employees who identify with a common diversity dimension.
- ERGs help define specific D&I issues that negatively impact their membership and require action. They then determine ideas and solutions to address concerns.
- ERGs serve the organization by identifying, generating and offering solutions to real or perceived obstacles so members can achieve their full potential.
- Professional development of its members is an important objective of ERGs – they work in partnership with Human Resources and other functions to provide career development strategies and activities.
- ERGs serve an important role as advisors to the organization's Diversity Council
- ERGs create opportunities to contribute to the organization's success by serving as a resource that influences and fosters a dynamic and positive work environment.
- ERGs can act as liaisons to various diverse markets served by the organization.
- ERGs participate in various recruitment and retention task forces and/or activities to help the organization achieve recruitment and retention goals.

## SECTION II: STEPS TO ESTABLISHING AN EMPLOYEE RESOURCE GROUP

Successful ERGs are dependent on a core of committed, dedicated and energetic employees who share common interests. An ERGs mission can only be accomplished by building a solid foundation that guarantees an effective outcome of its goals and objectives. To do so, the steps set forth below should be ensued:

1. Prepare a brief statement of what you want the ERG to represent and accomplish – this should not be considered a final mission statement; the purpose of this document is to use it as part of an ERG application form.
2. Develop an ERG application form. Work together with Human Resources to get the document approved.
3. Establish a list of at least 6 employees interested in joining the ERG.
4. Identify targeted members from various functions, levels and sites.
5. Prepare an introductory message, including the brief statement of what you expect the group to represent and accomplish. Send this message via an email blast to targeted members.
6. Make use of other internal communication methods to convey your message, e.g., the organization’s internal diversity and inclusion web site page, social media, etc.
7. Coordinate your first meeting with the Chief Diversity Officer or person responsible for the organization’s diversity and inclusion efforts.
8. The first two meeting’s agenda should focus on developing the group’s charter. Note: Appendix A includes a sample. Consider the following when developing your group’s charter:
  - a. The ERG assures alignment of its mission with the organization’s business goals.
  - b. The ERG assures alignment of its mission, goals and objectives with the Diversity and Inclusion Plan.
9. Define the ERGs Purpose, Goals and Objectives:
  - Sample Mission Statement
    - a. To serve as a resource to the organization to positively influence the environment, to ensure professional development of its members and to assist the organization in achieving its diversity and inclusion plan.
  - Sample Goals and Objectives
    - b. Support the organization’s efforts to attract and retain best X talent.
      - Work – life balance
      - Off-ramping or On-ramping
      - Job sharing
    - c. Assist in driving organizational initiatives that maximize the development of X employees.
      - Mentoring
      - Coaching
      - Participation in visible and important projects and task forces

- d. Promote X employees leadership and development at all levels in the organization.
  - Raise levels of exposure
  - Create forums for education
- e. Build an internal support system for X employees within the organization.
  - Develop and implement initiatives that reduce isolation
  - Address X employee's issues and concerns
- f. Assist organization X in creating and sustaining a diverse and inclusive environment.
  - Engage white males as full diversity partners
  - Lead other employees towards better cultural understanding
  - Support all dimensions of diversity

## **SECTION III: EMPLOYEE RESOURCE GROUP OPERATING PRINCIPLES**

The following operating principles should be presented to and approved by the organization's Chief Diversity Officer or the person responsible for Diversity and Inclusion efforts.

- Members must be employed by organization X.
- Membership is open to all organization X employees
- Membership is voluntary and the group's efforts should stem from the grassroots. It is prohibited to force employees from group X to join.
- Attend a majority of group X's meetings.
- Support the organization's mission and be an advocate for the diversity and inclusion process.
- Opinions, experiences and ideas shared by members of an ERG during meetings or related activities and records thereof, shall be held in confidence and shall remain the sole and exclusive property of your organization.

*Note: this document presents standard guidelines for establishing the group's operating principles and does not purport to represent your organization's requirements. Appendix A: Sample Charter includes additional information.*

## **SECTION IV: BEST PRACTICES TO SUSTAIN AND MAINTAIN AN EMPLOYEE RESOURCE GROUP**

### **Leadership Support**

The success of an Employee Resource Group is highly dependent on the support of senior management and employees' managers/supervisors. Additionally, the support of the Chief Diversity Officer and the organization's Diversity and Inclusion Council is very important in helping ERGs achieve their goals and objectives.

### **Charter**

A well-crafted charter provides ERGs a solid foundation and structure to understand and carry out its purpose, goals and objectives. It is not intended to be a contract but an organic document which may change as business needs change. (See Appendix A).

### **Funding**

Effectively run ERG funding sources may come from organizational funds, membership dues, events and other means of group raising revenue. A mutually beneficial way to raise funds is to share the investment in time and expense for business related and public-relations activities sponsored by the organization.

### **Internal and External Alliances and Partnerships**

Diversity and inclusion initiatives, programs and ideas benefitting a variety of internal and external stakeholders promote a positive image and reputation for the organization. For example, ERGs can create task forces to address the group's specific diversity and inclusion issues relative to a given internal stakeholder, such as leadership, human resources and other functions or business units/departments. Additionally, alliances with external stakeholders, such as a community organization or educational institution are mutually beneficial to members and the organization.

### **Individual Grievances and Complaints**

An Employee Resource Group does not act as a forum for resolution of individual grievances and complaints or personal, religious or political agendas.

## **APPENDICES**

### **Appendix A: Employee Resources Group Charter (Sample)**

This sample ERG Charter details its mission, objectives, structure and workings. An effective charter will help guide the ERG and ensure that its members understand its purpose and stay on track to accomplish it. Keep in mind that this is a sample charter and each organization should adapt it to meet its own specific needs.

## Organization X's Group X Resources Group Charter Founding Charter – 2012

*Developed by  
Armida Mendez Russell*

### **Vision Statement**

Organization X is committed to diversity and inclusion and places a high value in Group X's advancement, proportionate representation at all levels and on work/life balance.

### **Article I – Official Name**

The official name is "Name of Organization's Name of Employee's Resource Group". For purposes of this charter, the terms "ERG" will be used.

### **Article II – The ERG Mission, Goals & Objectives**

Our ERG mission is to serve as a resource to the organization to positively influence the environment, to ensure professional development of all Group X and to assist the organization in achieving its diversity and inclusion plan.

Our objectives are as follows:

- Assist in driving organizational initiatives that maximize the development of Group X employees
  - Mentoring
  - Coaching
  - Visible projects
- Support "Name of Organization's" efforts to attract and retain the best Group X talent
  - Work/Life Balance
  - Off-Ramping or On-Ramping
  - Job Sharing
- Promote Group X's leadership and development at all levels in the organization
  - Raise level of exposure
  - Forums for education
- Build an internal support system for Group X within the organization
  - Reduce isolation
  - Address Group X's issues/concerns
- Assist "Name of Organization's" in creating and sustaining a diverse and inclusive work environment
  - Engage White males as full diversity partners
  - Lead other employees toward better cultural understanding
  - Support all dimensions of diversity
  - Assist "Name of Organization" in fostering an environment of inclusiveness that supports our company's DNA, allowing us to assist in becoming "The Company of Choice"

To accomplish this, the ERG:

- Serves as a resource to the organization by supporting recruitment, development, leadership goals attainment and retention initiatives for high talent Group X.
- Promotes and supports key diversity and inclusion initiatives that recognize, respect and leverage the individuality of all "Name of Organization" employees as a competitive advantage.
- Develops communication methods to share information and promote ERG activities, events and major initiatives.

### **Article III – Participation**

Membership is open to all organization Group X worldwide. Members must meet and maintain the following eligibility requirements:

#### CRITERIA

- Members must be employed by "Name of Organization".
- Membership is open to all "Name of Organization" Group X employees.
- Membership is voluntary and the group's efforts should stem from the grassroots.
- Attendance to a majority of ERG meetings – as determined by ERG site (GEO) leadership
- Support the organization's business needs and be an advocate for the diversity & inclusion process
- Participate in Action Teams
- Confidentiality where appropriate

#### LEADERSHIP

- ERG leadership will be determined by members and will serve a 24-month term – leadership is determined by site (GEO) membership
- The order of expiration of ERG site (GEO) leaders will be determined by attrition, volunteerism or decisions made by ERG site (GEO) membership
- New and replacement leadership will serve 24-month terms from the date of selection

#### CONFIDENTIALITY

Opinions, experiences and ideas shared by members of the ERG during meetings or related activities and any records thereof, shall be held in confidence and such records shall remain the sole and exclusive property of "Name of Organization".

### **Article IV – Meetings**

#### FREQUENCY

ERG meetings will be held quarterly. Any Action Team meetings will be held as determined by Action Team chairs and Action Team members.

#### ATTENDANCE

Action Team leadership and members are required to attend Action Team meetings until such time as Action Team sponsored event/activity is completed; all other members are encouraged to attend ERG meetings, events and other activities.

**DOCUMENTATION:**

All ERG meetings and/or teleconferences will be managed in the following manner:

- Attendance
- Old business
- Items discussed
- Decisions made
- Action items
- New business
- Next meeting date and agenda

Agendas will be provided in advance and meeting notes will be taken and kept by committee designees.

**PROTOCOL:**

All ERG meetings and/or teleconferences shall be conducted in accordance with the following “Inclusive Behaviors”:

- Share freely of member’s experiences
- Encourage others to share freely
- Allow one conversation at a time
- Respect unique/different points of view
- Agree to disagree
- Confine comments to the issue at hand
- Be sensitive to everyone’s time
- Be considerate of the feelings of others
- Provide a timekeeper as needed
- Maintain the confidentiality of internal issues
- Be creative and encourage creativity in others
- Be an active communicator and listener
- Think about the greater good of the organization as a whole

**Article V – Funding**

- Company funds: establish a specific, goal oriented agenda and set a business plan to present to senior management
- Membership dues, events and other means of the ERGs raising revenue
- Share the investment in time and expense: business related and public relations activities sponsored by the company

**Article VI – Infrastructure**

The ERG was created to serve as a resource to the company and as a support group for “Name of Organization” Group X. The selection of leaders is based on the commitment to the goals and parameters of the group (may be site (GEO specific). Executive support shall be provided by the Executive Group X’s Advisory Group and the Diversity Office. The ERG hereby establishes the

following initial Action Teams that will work to support similar organization sponsored action teams, as deemed necessary and appropriate.

INITIAL TASK TEAMS - TBD (*Suggestions below*)

The Workforce Goals Action Team

- Will support the Executive Diversity Steering Committee and the Diversity Office in identifying on-going initiatives relating to the representation of Group X in leadership roles;

The Professional Development Action Team

- Will Identify on-going initiatives relating to Group X's development and advancement and the appropriate implementation strategies;

The Workplace Environment Action Team

- Will identify on-going initiatives relating to the creation of a respectful workplace environment;

These Action Teams may be adapted, modified or eliminated at some future date, and new Action Teams should be created as the ERG begins to fulfill its overall objectives and as newly identified Group X's issues surface.

CHAIR – An ERG site (GEO) chair position (the “Chair”) will be created in which an ERG member shall serve for a period of 24 months and subsequent chairs will be identified on a volunteer basis.

HUMAN RESOURCE REPRESENTATION – TBD

ERG ARCHIVIST – AN ERG archivist position will be created (at each site (GEO) and staffed by "Position". The initial archivist is "Name" and he/she is responsible for building and maintaining the ERGs history for future reference.

**Article VII – Adoption and Amendments**

This charter shall take effect immediately upon being put in final format and approved by the ERG, The Executive Group X's Advisory Group and the Executive Leadership Team or other appropriate body.

Any member of the ERG, the Executive Group X's Advisory Group and/or the Executive Leadership Team may propose amendments. Adoption of amendments shall be subject to the same approval process as the founding charter. Approved amendments will be incorporated into the charter and shall take effect immediately, or as described in the amendment.

This charter is created as a framework around which the ERG will carry out its mission. It is not intended to be a contract and may change, as business needs change.

**Article VIII – ERG Image**

ERG members must model leadership in all aspects of the diversity and inclusion process and must represent a positive image for "Name of Organization" in all its dealings.

**Article IX – Support**

Executive support is provided by the Executive Group X’s Advisory Group which will serve as liaison to senior management

Staff Support: TBD

**Article X – Monitoring and Measurement**

ERG progress plans and accomplishments are reviewed on a regular basis

## Appendix B: Employee Resource Group Scorecard

A Diversity and Inclusion Scorecard is a useful tool to measure the effectiveness of an Employee Resource Group's performance under specific objectives determined by the ERG to be of utmost importance to the group and of mutual benefit to the organization.

### Organization/Business Unit: Summary Roll Up by Function

Assessment Category	HR & Administration	Legal	Research & Development	Finance & Operations	WW Sales & Marketing	
Leadership Support and Accountability	I	M	M	M	M	I Area where improvement is needed
Group X's Workforce Goals	M	S	M	M	I	M Area where moderate progress is being made
Development and Advancement of Group X Employees	I	M	M	M	M	
Recruitment and Retention of Group X	M	M	M	I	I	S Area where significant progress is being made
Benefits, Work-life and Flexibility	I	I	I	M	I	
ERG Communications	I	S	I	M	M	
Results of Participation in Events and Activities	I	M	I	I	I	
Other						

Assessment results are reflective of data as of August 2012

## **Appendix C: Global Diversity and Inclusion Benchmarks**

Standards for Organizations around the World – A groundbreaking tool for helping organizations determine strategy and measure progress in managing diversity and fostering inclusion. Authors: Julie O’Mara, Alan Richter and 79 Expert Panelists

For a copy of the Global and Inclusion Benchmarks, please visit us at:

[http://www.omaraassoc.com/pdf/GDIB\\_2011.pdf](http://www.omaraassoc.com/pdf/GDIB_2011.pdf)