Employee Resource Groups

Toolkit for creating and sustaining effective ERGs

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Canadian Centre for Diversity and Inclusion
Centre canadien pour la diversité et l'inclusion

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Introduction

About this toolkit

Like CCDI's previous toolkits, this document's contents are partly derived from a collaborative effort with input from professionals across Canada. The original version of this toolkit, published in 2015, was created using information gathered from attendees of CCDI's Community of Practice Events and the ERG Bootcamp session at UnConference in 2014.

This version, developed in 2023, builds on the information gathered in 2014 with recent research and resources to bring fresh perspectives and insights about employee resource groups. In addition, we have added "In action" panels to highlight how some of CCDI's employer partners are enacting best and promising practices in their ERGs. With these updates, we hope to make it even easier for you to implement ERGs in your organizations or empower and evolve existing groups.

It is our goal to provide comprehensive and up to date information. However, the DEI landscape is constantly evolving and leading practices may shift. If you notice something that should be added, updated, or removed while engaging with this toolkit, or if you have any questions about the content of this toolkit, please reach out to us at **research@ccdi.ca**.

History of ERGs

The first employee resource group (ERG) was established at Xerox in the 1960s in Rochester, New York, in response to race riots around the United States.[1] The CEO of Xerox met with Black employees to discuss how Xerox could better serve and support them and developed an advisory council to continue the consultation process. Through this venture, Employee Resource Groups emerged.

These groups were imported into Canada through multinational corporations headquartered in the United States and from grassroots efforts to increase the visibility of specific diverse populations within the Canadian workforce.

In many organizations, work was done to "Canadianize" the focus and structure of ERGs. In recent years, many Canadian employers in all sectors have seen the benefits of employee resource groups within their organizations. As a result, they have developed unique approaches to establishing and managing ERGs.

Definition and purpose

The primary purpose of ERGs is to provide groups of employees with a formal structure within the organization to support their unique needs related to specific personally identifying characteristics, including visible and invisible identities or qualities.

For some employees, the opportunity to create communities at work is particularly engaging. ERGs create networking opportunities for equity deserving groups who may have been historically excluded from these opportunities.[2] The communities formed through ERGs may also appeal to employees whose personal lives or identities pose specific challenges or those from cultures that place a high value on community.

> **CCDI Glossary definition of employee resource groups**
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> *Employee led groups that serve many purposes depending on the organization and its focus, structure, sector and / or industry. Their primary purpose is to provide equity-seeking groups with a formal structure within the organization to support their unique needs.*

ERGs can also provide opportunities for development and networking, recruiting, or feedback, among other business benefits. They can present more formal avenues for the fair distribution of professional opportunities and act as advisors for inclusive policies and procedures across the organization.[3] Additionally, when leveraged appropriately, ERGs are an avenue for all employees to learn more about specific diverse groups.[4]

It is also essential to address what ERGs are not. These are important factors to consider when implementing ERGs or if you wish to better leverage the ones you already have in your organization. ERGs are not...

- **Exclusive:** A common concern about ERGs is that they further exclusion by separating employees into groups, the interests of ERGs run contrary to the interests of other groups in the organization, or they give certain groups priority over others.[5] While ERGs provide a community for equity deserving groups, they should be open to everyone and should not create insiders and outsiders. They exist to give equity deserving groups a voice at the table, not to fulfill individuals' agendas. Additionally, ERGs are not siloed. There should be structures in place to connect ERGs to each other and to organizational goals and strategies. ERG leaders are not the sole owners of organizational inclusiveness.

- **Social clubs:** Another concern is that ERGs are cliques or social clubs that don't impact the business. ERGs should create a safe space for discussion and learning that is open to all organization members and avoids proselytizing. They should be structured to align with organizational goals to meaningfully advance inclusion rather than acting as window dressing or tokenism. Their format should also not promote stereotypes.

These pitfalls can occur when ERGs are not properly implemented or managed, when there are insufficient or no guidelines or structures to support them, or when they are not linked to organizational strategies and objectives.

Types of ERGs

Employee resource groups can be formed based on any personally identifying characteristic or, more recently, shared values and goals (e.g., environmental ERGs). While not an exhaustive list, at CCDI, we have been able to identify the following types of ERGs that have formed within Canadian organizations:

- Cultural
- Environmental concerns
- Faith-based
- Family and parents (e.g., single parents, working parents, family caregivers)
- Indigenous (First Nations, Inuit, and Metis)
- Inter-generational
- International (e.g., newcomers or immigrants)
- Language-based
- Mental health and wellness
- Neurodiversity (e.g., employees with Autism or ADHD)
- New hires
- People with disabilities
- Racial and ethnic groups
- Retirees or those transitioning into retirement
- Sexual orientation and gender identities (e.g., 2SLGBTQI+ employees)
- Specific generations (e.g., millennials)
- Veterans
- Women
- Young employees

There are various names for ERGs depending on the organization. Terms include affinity groups, employee network groups, special interest groups, and business resource groups (BRGs). In addition, some organizations create their own names for the groups, such as the Team Member Resource groups at TELUS.[6] The term "business resource group" is generally used for mature groups that have an established strategic role and impact in the organization.

In action: Scotiabank

Scotiabank's ERGs showcase the range of identities and topics that can be the focus of an ERG:[7]

- Black Employee Network
- Caribbean Network
- China Banking Network
- DiversAbility
- Environmental & Climate Action
- Family and Parents Network
- "HOLA" Hispanic Organization for Leaders and Advancement
- Indigenous Network
- Mental Health & Wellness
- Middle Eastern Network
- Pride
- South Asian Network
- Veterans Network
- Women
- Young Professionals

Value of employee resource groups

Value to organizations

For employers that don't currently have them or those trying to maintain or increase funding and resources for ERGs, it may be necessary to demonstrate the value ERGs can provide. The following benefits have been gathered from existing literature and feedback from our 2014 Community of Practice events.

➡ Business strategy alignment and innovation

ERGs can be a vital source of input when developing inclusive policies and practices, as the diversity of viewpoints can lead to more successful implementation.[8][9] They can better locate areas needing improvement or attention, leading to the development of more innovative solutions to business challenges. By embracing these viewpoints, companies with ERGs are likely to do better in DEI implementation.[10] Additionally, ERGs offer the opportunity for increased innovation in other areas of the business. Organizations can leverage the innovative thinking provided by ERGs to solve business challenges, modernize policies and practices, and even create new products.

➡ Connect with an extended or new customer base

In line with their innovative capabilities, ERGs can also help an organization connect with specific customer demographics, understand the needs of a diverse market of customers, and evaluate the effectiveness of marketing campaigns.[11] Specialized network groups can be excellent forums for idea generation and sounding boards for targeted campaigns. They can act as in-house focus groups and a formalized source of information for the organization.

Input from ERGs can also be used to support business development in different communities. For example, ERGs can help a company expand its reach through increased community presence and connections with more diverse suppliers, business partners, and job candidates. When ERGs engage with the community, it sends a strong message about an organization's values.

➡ Recruitment, inclusion, engagement, and retention

ERGs can improve diversity across the organization by suggesting process improvements in recruitment, development, or retention of a diverse workforce. They may be able to provide direction on the best techniques for recruiting members of the group that the ERG represents and can be explicitly leveraged for referrals in recruitment.[12] As a source of leadership development for members, ERGs can also be an excellent pool for sourcing potential organizational leaders in succession planning.[13] Additionally, the presence of ERGs in an organization increases its attractiveness to potential applicants.

Employees who are members of an ERG are likely to identify more with their organization and be more satisfied at work.[14] When employees feel like they belong and are connected to a community, they are likely to stay with the organization longer.[15] Additionally, the feelings

of belonging generated by ERG involvement positively impact engagement.[16] Leadership and professional development opportunities provided by ERGs are discussed in the next section as they pertain to individuals, but these benefits also extend to the organization. Holding a leadership role in an ERG can increase an individual's ability to positively impact business results.[17]

ERGs add value to the employee experience and create a more personalized workplace where employees can engage in their work with their whole identity. ERGs can also provide opportunities for other employees to learn about and engage in DEI initiatives through cultural celebrations and learning events.

Value to individuals

The reasons employees participate in ERGs have shifted over time. In the past, many ERGs were formed to address negative experiences in the workplace. While working to eliminate stigma and discrimination towards diverse populations remains an important element of ERGs, employees may choose to participate for other reasons. Increasingly, motives for engagement with an ERG relate to the positive benefits obtained through involvement.

Some major benefits of ERGs for employees identified in the literature and by Community of Practice participants are described below.

➜ Fostering community and engagement

ERGs foster community and improve both engagement and job satisfaction. Through ERG participation, individuals can gain social and professional support and create internal and external professional networks. Members of equity deserving groups are less likely to have access to networking, mentorship, or sponsorship opportunities than their white male counterparts. According to a study by LeanIn.Org and SurveyMonkey, 31% of white men, 27% of white women, and 19% of black women reported having a mentor or sponsor at some point in their career.[18] ERGs allow employees to network with people across the organization, resulting in unique collaborations that can drive business ideas forward.[19] ERGs also help employees develop a sense of community with their colleagues and a collective voice that can be used when approaching management regarding issues or concerns. This is especially important when an individual may fear possible repercussions from bringing up an issue on their own.[20][21] Additionally, this community creates a sense of belonging within the organization, especially for underrepresented groups and individuals from community-oriented cultures.[22]

➜ Leadership and professional development

Participating in an ERG can also provide individuals with opportunities for professional development in several ways. First, the networks formed through ERG involvement can benefit individuals' careers by increasing their visibility within and outside the organization. The ERG may, formally or informally, create connections for coaching and mentorship that can accelerate success. Additionally, through ERG programming, members may receive both formal and informal learning opportunities and assistance with their career development.[23] Finally, participation can grant members increased access to organizational leaders, and leading an ERG provides leadership

development opportunities.[24] These benefits are particularly important for equity deserving groups who continue to be underrepresented in leadership positions. For example, just 19.8% of executive officer positions at Canadian publicly traded companies are held by women.[25] The disparity, and subsequently the need for these ERG-sponsored opportunities, compounds with intersectional identities. Leadership representation is significantly lower for people of colour, people with disabilities, and Indigenous people.

➡ Non-member employees

The benefits of ERGs extend beyond employees who choose to participate. When senior leadership is seen visibly supporting ERGs and attending ERG-sponsored events, the organization's commitment to diversity is viewed as more credible, and leaders appear more approachable. In addition, showcasing diverse employees in key leadership positions within the company can inspire visions of growth opportunities for all employees. Finally, ERGs can aid in transforming an organization's culture by providing opportunities for individuals to learn about those with different dimensions of diversity. This can, in turn, promote allyship and stronger connections between employees, resulting in greater work-life satisfaction, benefiting employees and the organization.

➡ ERG leaders

ERGs offer specific benefits to those who lead them. Leaders are given exclusive opportunities to develop and enhance their skills in leadership, conflict management, communication (verbal and written), teamwork, and project management. In addition, ERG leaders often have increased access to organizational executives, increasing the potential for an organic mentoring or sponsorship relationship. Leaders also enjoy the satisfaction of helping the company, colleagues, and community by creating positive change within and outside of the organization.

Setting up ERGs for success

Characteristics of the organization may have positive or negative impacts on the ability of an ERG to function effectively. Within the Canadian context, several significant factors have been identified, including organizational culture, geographic decentralization (organizations with multiple regional locations), industry or sector differences, regionally, nationally, or internationally operated or managed organizations, rural versus urban locations, size of the organization, etc.

In our experience working with dozens of employers at CCDI, we have seen that ERGs can operate successfully under several different models when these factors are considered in the planning, implementation, and management of ERGs. Although no formula exists to guarantee success, there is a range of strategies that have been utilized to promote positive outcomes.

We have determined seven key areas for consideration to set up ERGs for success:

1. The organizational level
2. ERG purpose and objectives
3. Funds and resources
4. Terms of reference

5. ERG programming
6. Monitoring and measuring for success
7. ERG recognition

1. The organizational level

Formalizing ERGs at the organizational level is critical for their success. Successful ERGs operate as an arm of the organization and should be actively and formally involved in meeting DEI and other objectives. As such, organizational leadership should establish formal structures, such as guideline documents or policies, which stipulate the procedures for creating, managing, and operating ERGs. The policies for ERGs will vary across organizations but should guide the expectations, boundaries, and scope of ERGs. Examples of topics that ERGs can cover in their guideline documents or policies include:[26]

- Leadership selection process (nominated, appointed, elected, etc.)
- Core competencies required for ERG leadership
- Membership and leadership structure (leads/co-leads, president, vice-president, treasurer, secretary, events/program coordinator, board of directors, etc.), roles/responsibilities of each, term limits on leadership roles
- Requirements or expectations for council and committee involvement
- Selection and responsibilities of executive sponsors
- Handling of funds
- Elections
- Procedures for amending by-laws, removing elected leaders, conflict management, etc.
- Communication guidelines
- Strategic planning guidelines

At the beginning of the process, it is also important to articulate the business case for ERGs at the organizational and individual levels. Ensure you communicate the value proposition for leaders' involvement and create a direct link to the organizational strategic priorities. Gaining strong, visible commitment and buy-in from leadership is essential for creating accountability, legitimizing the ERGs throughout the organization, and ensuring the ERGs have a concrete direction.[27] [28]

👍 Success story: Women@Stantec[29]

The Stantec community unites approximately 22,000 employees working in over 400 locations across six continents. Their work involves engineering, architecture, interior design, landscape architecture, surveying, environmental sciences, project management, and project economics which includes the initial project concept and planning through design, construction, and commissioning. With a long-term commitment to the people and places they serve, Stantec has the unique ability to connect to projects on a personal level and advance the quality of life in communities across the globe.

Designing with the community in mind is what drives Stantec to succeed. Stantec knows that success begins at the intersection of community, creativity, and client relationships. With community and creativity in mind, Stantec recognizes that the minds of all genders must be heard to encourage success for the company and its valued employees. That is one of the reasons why Stantec implemented its women employee resource group (ERG), Women@Stantec.

> *"There is this real desire to form a community that brings women together to share ideas and learnings from personal success stories, while allowing for confidence, skill building and meaningful networking opportunities."*
> **Asifa Samji, Women Leadership Development sub-committee Chair, Women@Stantec**

One of the clear objectives of the company's overall Diversity and Inclusion strategic plan is the focus on supporting the creation and development of ERGs. These employee groups provide increased awareness, education and employee engagement about diversity and inclusion at work.

The Women@Stantec ERGs are a significant initiative that supports that strategic plan objective. In doing this, along with the sense of community and passion that has been created at Stantec, it is no wonder that these ERGs are continuing to be such a success.

Stantec's ERG initiative now includes Indigenous Connections, Pride@Stantec, BLK, Military and Veteran Advocates (MAVA), Asians@Stantec, Persons with Disabilities (PWD)@Stantec, Latinos in Stantec (Lis), and Cultural Awareness & Inclusion.[30]

2. ERG purpose and objectives

When setting up an ERG, it is essential to define its purpose. An ERG needs to determine what they want to do, how they will do it, and what it will cost. Developing a clear mission and vision for the group, determining objectives, and securing an executive sponsor will help to ensure that the ERG meaningfully contributes to the organization and that leadership understands this contribution.

➡ Develop a mission and vision

Developing a mission and vision is one of the first actions taken in this process.[31] Consider the story of the ERG, its members, and the company. These can be positive stories that create feelings of pride or stories that highlight the need for change. Consider how well represented the identity group is in the organization? How do members of that identity group feel within the organization? How involved is the organization in the community? Has their community involvement been positive or negative? The story that you develop should form a compelling background for the formation of an ERG and may even inform your goals later.

Then, consider the goals of the organization. Are there any gaps or missed opportunities, especially concerning the ERG identity group? Think critically about what your ERG could contribute to the organization's success in its operations and DEI strategies.

Analyze the ERG in a similar fashion, looking at strengths, weaknesses, opportunities, and threats. Who could be involved? What activities would best support both the group members and the organization?

Finally, create a vision and mission based on your brainstorming that encapsulates how the ERG will support its members and the organization. It can also be helpful to determine the group's core values and how they will drive the group's mission.[32]

⚙ In action: RBC Canada

The ERGs at RBC are featured on the website alongside a clear mission statement outlining their purpose in the organization.[33] Three examples are showcased below:

- **Royal Eagles:** A fellowship of both Indigenous and non-Indigenous employees working together to raise awareness and support Indigenous culture throughout RBC.

- **Pride:** Contributes to creating a positive, inclusive and sustainable work environment for lesbian, gay, bisexual and transgender (LGBT+) employees.

- **Mosaic:** Our mission is to foster an inclusive culture by enabling the success of visible minorities and newcomers to Canada.

➔ Define the objectives

The next action to define the purpose of the ERG is to develop objectives. Be sure to align the objectives of the ERG to the overall organizational strategy and its DEI strategy.[34] For example, if the ERG decides to focus on recruiting, but the organization is in the process of layoffs, then the strategies are not aligned. Consider these questions: How does your ERG align with the organization's objectives? How is the group helping achieve or operationalize the DEI strategy? It is important to balance social and business goals developed for the ERG.

➔ Get an executive sponsor

Finally, each ERG should have an executive sponsor to support the group and its mission. They should be champions and advocates for the ERG and accountable for the group's success. In some cases, such as in larger organizations or those that operate in different regions or countries, it can be beneficial to have more than one executive sponsor.[35] A best practice is for the executive sponsor to be from a different group than the identity of the ERG, to provide opportunities for mutual learning (e.g., a non-parent as an executive sponsor to a working parent group).[36] However, the executive sponsor must have a demonstrated interest in the ERG's mission and the organizational DEI goals.[37]

Executive sponsors are generally responsible for:[38]

- Collaborating on developing goals, standards, metrics, and a strong value proposition.
- Coaching and mentoring the team.
- Leveraging their status in the organization to achieve objectives.

3. Funds and resources

Financial support from the organization is critical for successful ERGs. ERGs provide as much value to the organization as they do to individuals, so groups should not be expected to fundraise for themselves or charge a membership fee to operate. Instead, the organization should allocate a formal budget annually.[39] The ERG budget may be allocated from the human resources department, diversity and inclusion office (if present), or corporate social responsibility budget.[40] A formal budget provided by the organization allows the ERGs flexibility in carrying out their missions and illustrates that the organization values the contributions and efforts of the groups.

The organizational policy should create formal guidelines for ERG budget parameters.[41] ERGs should create business plans or proposals that establish clear ties between their activities, objectives, and funding requirements.[42] Aligning the budget with ERG objectives can also be useful for evaluating metrics and ROI.[43] Although budgets are often limited, ERG access to resources can be expanded through partnerships with operational departments. For example, human resources may assist with training and recruitment, and marketing, public relations, and communications departments can support communications-related activities. Organizations can also provide guidance, support, coaching, and education resources on top of funding.

Executive sponsors can play a key role in acquiring resources and be an essential resource in and of themselves.[44] An executive sponsor's backing will help an ERG acquire the resources needed to start. A senior executive can be beneficial in this role as they can relay requests to the larger leadership team.[45] With this in mind, each ERG must have a committed executive sponsor to ensure equal access to resources.

Funding amounts vary greatly depending on the organization's size, type, location, and more. Past research has found that organizations provide an average of approximately $7,000 per 100 members per year. However, some larger organizations provide over $50,000, and some provide no funding.[46] Some organizations may choose to fund all groups equally, but many base their allocations on the proposals and plans submitted by each group.

4. Terms of reference

A 'terms of reference' (also called a 'charter') document highlights the group's purpose, regulations, objectives, and roles and responsibilities of its members.[47] When created collaboratively and agreed upon by all parties involved, this document creates clear expectations for the organization and the ERG.[48] This document can be used to monitor and measure the group's progress towards its goals. While not an exhaustive list, the terms of reference or charter document may include:[49] [50]

- Mission and vision
- Goals and objectives (aligned with organizational and DEI objectives)
- Principal activities
- Meeting frequency and structure
- Communication plan
- Strategic plan
- Budget considerations/fund allocation

The terms of reference or charter should also highlight membership processes or guidelines. Membership should be voluntary and open to all employees. This section of the document can include:

- The membership recruitment plan.
- The application processes.
- What membership provides employees.
- Roles and responsibilities of members and leaders, including the executive sponsor.
- Time commitment expectations in the short and long term.

➜ Including allies

There is considerable debate over allies' participation in ERGs. An ally is someone who does not self-identify as a member of a specific group but supports inclusion for members of that group. For example, a straight person who supports LGBTQ+ equality may be referred to as an ally, or a man may be an ally to a women's group.

In many organizations, allies are permitted and encouraged to join and participate in any ERG. In other words, people who do not self-identify as a member of that group are invited and encouraged to join identity-specific ERGs. Many DEI professionals consider it a best practice to actively encourage the participation of allies within ERGs, recognizing that individuals may support a group's mission, even though they do not personally identify with the ERG's specific diversity characteristic. Many organizations have found that ally involvement in ERGs provides cross-cultural learning and other opportunities for connection and development.

However, ERGs must handle ally participation carefully. While the support and involvement of allies can be important, the process of developing or recognizing allies can never be at the expense of limiting the voices of those who face marginalization or discrimination. The potential exists for allies to "take over"; instead of supporting members of equity-seeking groups, the allies may end up further contributing to their marginalization.

It is a complex dynamic to moderate, but an essential piece for employers and individuals who identify as allies to understand. It can also be considered within the terms of reference or charter of the ERG. For example, the group may open some sessions/events to allies, while others remain a safe space for conversations for equity-seeking groups. This decision depends on the ERG's purpose and whether the intention is to create a safe or brave space. However, accountability is an important part of creating these spaces.[51] Participants must align their intentions with impact, be responsible for their words and actions, while following community/group guidelines for participation.

CCDI Glossary definition of safe space	CCDI Glossary definition of brave space
A "safe space" is a space where people feel psychologically safe and can express honest impressions, thoughts, and attitudes without fear of ridicule. A safe space is one that doesn't incite judgement based on identity or experience – where the expression of both can exist and be affirmed without fear of repercussion and without the pressure to educate.	*"Brave space" emerged as a concept out of the critiques of safe spaces. A brave space encourages dialogue. It is conceptualized around recognizing differences and holding each person accountable to do the work of sharing experiences and coming to new understandings—a feat that is often hard, and typically uncomfortable.*

5. ERG activities and programming

➡ Engaging internal and external stakeholders

You first need an engaged group of internal and external stakeholders to have successful ERG programs and initiatives. That is, ERG members, other employees, executives, outside individuals, organizations, and even client groups will participate in and support the ERG activities. ERGs should be encouraged to seek input from organizational leaders and employees to generate buy-in and solve problems.

For cross-collaboration and mutual learning, employers should engage and connect ERGs with other teams in the organization (e.g., human resources, social responsibility, community involvement, public relations). You can also enhance client engagement by connecting to ERGs in your client organizations.

The organization can also support ERG recruitment and visibility through internal communication channels. ERGs are often permitted to utilize the organization's communication resources with prior approval.[52]

Several examples of communication methods are outlined below.

- **Town hall meetings:** Put ERGs on the agenda of organization-wide meetings. Allow ERG representatives to give quick updates on activities and progress.
- **Social media:** Generate buzz around ERG activities through posts on social media.
- **Newsletters:** Add ERG updates, events, successes, and suggestions to regular employee or client/customer newsletters.
- **Website:** Employees, prospective employees, and other stakeholders with information about the ERGs and their activities and missions.
- **Recruitment and retention:** Provide candidates, new hires, and existing employees with information about the organization's ERGs. Include ERGs in recruitment materials (e.g., job postings, careers page on website), onboarding documents, and professional development information.

Other methods include employee intranet spaces, information sessions, employee forums, Slack channels, physical bulletin boards, leadership meetings, and inclusion in the company events calendar.[53] [54]

Sharing information about major initiatives, group results, concerns, and recommendations improves the group's visibility, enhances their ability to meet group objectives, and emphasizes organizational level support for these groups.[55] In addition, disseminating ERG information to client organizations and other external stakeholders can improve your organization's image and encourage external involvement.

Finally, consider providing an online or physical resource centre for easy access to the information, guidance, and resources needed by ERGs.

→ Programming ideas

As part of the business plan provided with a funding request, ERGs should provide a calendar of activities and programs. Planning into the future is important for demonstrating budgetary requirements but remember that it can be challenging to plan too far in advance as group priorities may change.[56] Programming should mirror the ERG's mission and enact its vision, benefitting the ERG members, other employees, and the organization.

We have gathered a range of programming ideas under five overarching goals, which are discussed in detail below.

Education and development
Professional development initiatives focus on developing skills and competencies related to the participants' careers or cultivating future leaders in the organization. It can be helpful to define specific and measurable outcomes from these types of initiatives to determine if they are contributing to the goals of the ERG.[57]

- Inviting external speakers for roundtable or panel discussions, fireside chats, Q&A sessions, or lecture style talks.
- Lunch and learns that offer professional development opportunities for ERG members or teach others in the organization about topics relevant to the ERG focus.
- Attending conferences as a group.
- Representing the organization as speakers or facilitators at conferences.
- Informal discussions on specific topics as a way to find and address problems or barriers in the organization in innovative ways (e.g., brainstorming, storytelling, or general discussion).
- Formal training such as courses, workshops, or e-learning.

⚙ In action: EPCOR

Herstory, EPCOR's women's ERG, "drives change within EPCOR by stimulating constructive conversations within the organization. These conversations focus on ensuring women feel included, empowered, and supported, as well as armed with the information and tools needed to make decisions about their individual, professional and personal growth."[58]

Herstory's annual "Hidden Figures" event features presenters from the EPCOR team who work behind the scenes, who have overcome challenges to lead, and are a big part of the organization's success. The event also features presenters from the external community to further highlight inspiring stories about women in the workplace.

These events earned Herstory the Employee Resource Group of the Year award for Western Canada at CCDI's 2020 Awards of Success.

Celebrations and culture

ERG programming around cultural events, commemorative days/months, or other celebrations can increase cultural competence and improve the organizational culture through pride, belonging, and education.

- Celebrating significant cultural events.
- Commemorative events.
- Book clubs, film clubs, watch parties, etc. that focus on media created by members of the relevant identity group.
- Group meals or potlucks.

Community and networks

As one of the core purposes of an ERG, programming focused on community and network building is essential in empowering the career growth of ERG members and building belonging within the organization.

- Networking events (e.g., speed networking, mixers, 1-on-1 coffee chats).
- Mentoring and sponsorship programs that connect members with leaders or colleagues.
- Team building activities outside of the workplace (e.g., dinners, retreats, recreational activities).
- Intranet space, message board, or other communication channel provided by the organization for discussion, information sharing, and other communication within the ERG.

Outreach and service

Engaging in activities external to the organization can help ERG members feel connected to their communities in a way that benefits those communities.

- Volunteering (e.g., homeless shelters, cultural festivals, non-profit organizations).
- Charitable efforts (e.g., fundraisers, food drives, sponsorships).
- Becoming a liaison for community organizations.
- Collaborations with external groups.
- School outreach (e.g., tutoring, speaking engagements, providing mentorship for students).

> **⚙ In action: The Insurance Corporation of British Columbia (ICBC)**
>
> ICBC's Ethnicity ERG[59] partnered with the Immigrant Employment Council of BC (IECBC) on the IECBC's MentorConnect initiative. The program connects employees (not limited to ERG members) with skilled newcomers to Canada who have similar education and work backgrounds.
>
> Employee mentors share their knowledge and experiences, gain skills, and learn about barriers faced by newcomers, while the newcomer mentees build human capital and learn more about the Canadian workplace.
>
> For more information about this initiative, see the CCDI case study:
> **A Canadian success story in diversity and inclusion - ICBC.**

Organizational support

One of the most significant benefits of ERGs at the organizational level is their capacity to provide diverse perspectives and innovation. This result can be achieved through several means, including:

- Involvement in new product development.
- Advising on recruitment methods, policy development, and other DEI initiatives.
- Evaluating and giving recommendations on current programs and initiatives.
- Connecting with new hires.
- Giving feedback on marketing and communications campaigns.
- Attending external events as organizational representatives (e.g., recruitment fairs, expos, conferences, etc.).

As a final note on ERG activities, it is important to remember that while ERGs can provide vital support and insight on DEI policies and practices, they should not become the sole owners or solely responsible for the organization's DEI efforts. This responsibility goes beyond their scope and level of involvement.[60]

6. Monitoring and measurement

The effectiveness of ERGs can be challenging to measure. The extent to which any outcome can be tied to ERG activities is limited as these activities occur across the organization through different departments, functions, and operational areas. Any benefits may be hard to see if ERGs are new to the organization. Additionally, many of the benefits are intangible.[61]

To measure the impact of ERGs, groups need clear, measurable objectives, which are reflected in their mission and vision, and the organization should tie measures used to evaluate ERGs directly to these objectives. When choosing metrics, it is also essential to consider the organizational goals and strategic priorities. When relevant metrics are selected, regular assessments allow the ERG to adjust their strategies and guide the organization in rewarding and recognizing the ERG's work, which is discussed later.

In Table 1 below, we outline examples of indicators and metrics that can be used to gauge ERG success.

Table 1 – Indicators and metrics for measuring ERG success

POLICY	EXAMPLE METRICS
Engagement / satisfaction / retention	- Productivity - Engagement/satisfaction surveys - Performance ratings - Employee turnover rate (ETR) - Termination/retention rates (voluntary/involuntary) - Reason for leaving/exit interviews
Recruitment	- Number of recruiting referrals provided by ERG members - Number of candidates brought in by ERG activities (e.g., attendance at career fairs) - Number or percentage of recruiting events with ERG representation - Workforce demographics and changes over time - Number of diverse hires resulting from ERGs - Number of leadership positions held by equity deserving groups
Professional development and career advancement	- Number of networking opportunities - Number of participants in networking opportunities - Number of development opportunities - Number of attendees at development opportunities - Number of mentorship/sponsorship opportunities - Number of participants (mentors and mentees) in mentorship opportunities - Number of members with an identified sponsor - Impact surveys - Promotion rates of ERG members - Number of ERG members in line for leadership roles

POLICY	EXAMPLE METRICS
Business development and financial impact	- Profitability - Incremental revenues - Return on investment (ROI) - Sales generated from ERG involvement (e.g., sales from new target market) - Number of sales leads submitted by ERG members - Number of new business relationships secured by ERG or resulting from ERG outreach - Number of diverse suppliers secured by ERG or resulting from ERG outreach - Number of processes influenced by ERG (e.g., policy development, talent management, product innovation/development, marketing, etc.)
Publicity and reputation	- Media mentions - Social media impressions - Website traffic - Number of events with ERG representation (internal and external)
Community relationships and impact	- Feedback from community - Number of organizations the ERG is involved with - Number of community service initiatives - Tracking member volunteer hours - Number of donations, value of donations
ERG awareness and engagement	- Number of members compared to number of employees - Number of members attending meetings compared to total number of members - Number of members broken down by level/department/office - Membership growth rates - Number of non-member attendees/participants at events/initiatives open to non-members - Number of participants, type of participants (job level, department, etc.), level of participation - Level of involvement of executive sponsors - Number of ERG members who are in leadership/executive roles in the organization

POLICY	EXAMPLE METRICS
ERG activities and impact	- Total number of events/initiatives - Cost of activities - ROI on each event/initiative - Number of attendees at events/participants in activities - Attendee/participant satisfaction surveys or impact surveys - Number of events aligned with each ERG objective (activity mix) - How many activities align with two or more ERG objectives (multiplier) - Number of times departments reach out for ERG assistance/advice - Number of presentations given by ERGs at internal meetings

The execution of these assessments can be approached in several ways. ERG measurements may be integrated with the organization's diversity scorecard or overall organizational scorecard, and some metrics can be added to existing employee satisfaction/ engagement surveys. Additionally, consider linking ERG involvement to human resources and talent management metrics to show the development of ERG leaders and members.

It is important to keep in mind that the impacts of ERGs can take some time to become apparent, and benefits may not be seen immediately.[62] As such, it can be helpful to select your metrics based on the maturity of the ERG and track changes over time to see the long-term impact.[63]

In action: Fidelity Investments

Fidelity Investments reports on their ERG metrics within the organization's public Diversity and Inclusion Report.[64] Fidelity's reported metrics include:

- Membership rates (total members, percentage of workforce, growth over time)
- Attrition rates (compared to company average)
- Percentage of members participating in volunteer opportunities
- Likelihood of members who "seek out and obtain job mobility opportunities" (compared to non-member peers)

7. ERG recognition

Recognizing and rewarding the work of ERGs is a vital step in formalizing the groups in the organization and ensuring they are impactful and sustainable. While ERG leadership and membership offer many intrinsic benefits to the individuals involved, the work of ERGs also benefits the organization and should be recognized as such. Recognition and rewards are particularly important for ERG leaders, who may spend up to 10-20% of their time on ERG activities.[65] Demonstrating that this time is valued leads to ERG leaders feeling more satisfied, willing to go above and beyond, and optimistic about their careers.

Even though participation in an ERG is voluntary and is often enjoyable and rewarding, the effort put towards ERG programming, leadership, and potentially providing advisory services across the organization is work. This work should not be expected to be done for free or only during the employees' free time. ERG time should be treated similarly to an employee's professional development time, research time, or time spent on a committee.[66] Doing so emphasizes the importance of the work that ERGs do and helps elevate ERGs to a level in the organization where they are making a meaningful impact.

As valuable contributors to organizational culture, reputation, and performance, ERGs should be positioned in the organization as opportunities for growth and advancement through performance evaluations. Consider including ERG activities and outcomes in formal performance management processes and performance reviews. Create a framework for how this work ties to performance and share it with managers so they understand clearly.

There are several ways to compensate for ERG work financially. This is not an exhaustive list, but some examples include:[67 68]

- Increase in overall compensation/salary.
- Bonuses for meeting ERG goals and metrics – either adding ERG criteria to existing bonus structures or adding new bonus opportunities.
- Annual stipend for ERG commitment.
- Additional stock options.
- Formally integrating ERG work into an individual's role and responsibilities.
- Fund provisions for memberships, events, and conferences that align with the ERG's mission.

Non-financial rewards can also provide recognition, especially for organizations where compensatory rewards may not be immediately feasible. In addition, ERG leaders can be offered specific growth, development, and networking opportunities. For example:[69 70 71]

- Leadership development programs.
- Training opportunities.
- Formal mentorship programs.
- Leadership coaching.
- Access to executives (such as quarterly invite-only AMAs[72]).

Ideas for rewarding ERGs as a group include:[73]

- Direct rewards such as gift cards.
- Donations to a charity of their choice that aligns with their mission.
- Bonus funds for celebrations.

Acknowledging the efforts of ERGs is just as important as rewards for accomplishments. A great way to do this is by promoting the ERG and increasing the visibility of their work. Some examples include:[74]

- Featuring the ERGs in a prominent location on the website with their own branding/logos.
- Including ERGs on the agenda of meetings and events.
- Publicly communicating your appreciation at meetings and events.
- Featuring ERG activities and accomplishments in newsletters, blog posts, and on the organization's social media channels.
- Encouraging employees to attend ERG events.

Building a solid business case for ERGs (see the section on value to organizations) and gaining executive support are critical for implementing formal recognition processes for ERGs.[75] It will also be essential to establish a measurement framework to measure the success of ERGs as it forms a basis for recognition and data to back up their organizational contribution. Additionally, clear descriptions of the roles and responsibilities of ERG leaders set explicit expectations for their performance and subsequent rewards.

⚙ In action: IBM

IBM recognizes and rewards their Business Resource Groups (BRGs) and BRG leaders in several ways.[76] [77]

- BRG leaders are given the opportunity to participate in leadership development programs and receive rewards via an online recognition program that can be used to purchase merchandise and trips.
- Cash incentives are provided through a "Manager's Empowerment Fund", and a "Leader Rewards Program" provides benefits such as specialty LinkedIn badges.
- IBM also designates the month of August as BRG Appreciation and Awareness Month.

8. Barriers or limitations

Although there are factors that lead to success, there are also factors that create barriers or limitations to the efficacy of employee resource groups. The following are common ERG "pain points" and challenges identified in the literature and our community of practice events. Many of these challenges can be addressed or prevented with adequate planning and structure when initially building ERGs into the organization.

→ Budget

Participants from our community of practice events identified inadequate budget as the most common barrier to ERG success. Many ERGs struggle to obtain or maintain organizational funding (or sufficient funding) to fulfill their goals and missions. Not only do limited financial resources hinder the ability of the ERG to function, but they also create a perception that there is less value given to the ERG's presence.[78]

→ Structure

Employees within the ERG may struggle to know exactly what they are allowed to do and how much autonomy the organization grants the ERG. Likewise, ERGs lacking resources and guidance, formal structure, and clarity of mission, vision, and connection to organizational goals will struggle to be effective and realize their value.[79] [80]

→ Engagement

Maintaining engagement from the membership of the ERG can be a struggle, particularly if there is doubt regarding appreciation of the work performed by the ERG from the employer. Challenges can also arise when there is a lack of management and leadership buy-in from ERGs.[81]

→ Leadership

Effective ERG leaders are critical for effective ERGs. When leaders lack role clarity, training, and adequate time to fulfil their duties, an ERG can struggle to achieve its mission and vision.[82] These factors, combined with insufficient recognition of the work of ERG leaders, can result in leadership fatigue and burnout.[83]

→ Measurement

Many organizations have difficulty measuring the outcomes of ERGs and demonstrating their success and value to the organization. This is often because the employer or organization does not establish the appropriate resources or mechanisms surrounding measurement tools. Metrics that are not well defined, communicated, and aligned to both organizational and ERG goals will not effectively measure the success of ERGs.[84]

The future of ERGs

There has been some discussion on the current relevance of ERGs, and whether there are more effective alternatives for developing a culture of inclusion and belonging.[85] However, research has shown ERGs are still relevant, effective, and impactful to individuals and organizations.

ERGs are evolving alongside other facets of DEI, and we are seeing an increased focus on intersectionality and collaboration. This vision of future ERGs collaborating within, among, and outside themselves directly addresses the concerns that would make them obsolete. Additionally, a focus on intersectionality ensures that groups do not become exclusive in themselves.

> **CCDI Glossary definition of intersectionality**
>
> *A term coined by Dr. Kimberlé Crenshaw to describe how social identities may overlap to create compounding barriers for individuals. It is described as a framework for approaching issues from multiple perspectives and understanding how multiple groups, or individuals with multiple identities, may be affected. For example, approaching feminism with an intersectional lens would involve acknowledging and addressing the unique barriers faced by women of colour, women with disabilities, or trans women.*

ERG intersectionality

Intersectionality within an ERG improves their ability to advise on meaningful DEI initiatives, policies, and practices.[86] The experiences or barriers faced by an equity deserving group are multidimensional and based on their intersecting identities. Without voices representing these experiences, the ERG, and subsequently the organization, may not be aware of a factor that impacts a particular policy. If we return to the **value to individuals** section of this toolkit, where underrepresentation is compounded when identities intersect, we can see why intersectionality in ERGs is essential. Providing opportunities related to career advancement to a women's ERG where membership is largely white will work to address a gap in women's leadership representation. However, it will do little to address the underrepresentation of women of colour, for example. The same concept may apply to an ERG for people of colour with no women as members.

Even if the ERGs membership is diverse, it is still important to be mindful of intersectionality and whether those diverse experiences are heard and addressed.

Guiding questions for examining the intersectionality of existing ERGs:[87]

- How diverse is the ERG itself? (e.g., a women's ERG whose membership is mainly white, able-bodied women may be missing an intersectional approach)
- Are the voices of those with intersecting identities being heard?
- Does the ERG acknowledge and address the unique barriers faced by people with intersecting identities?
- Is the ERG welcoming of diversity in its membership? Is that being clearly communicated?

In action: TD Bank

Intersectionality is the centre of TD's DEI initiatives, and the organization's approach to anti-Black racism conversations is an excellent example.[88][89] Panels on anti-Black racism included Black, South-Asian, and 2SLGBTQI+ members to acknowledge and discuss the impacts of intersecting identities.

Cross-ERG collaboration

Collaboration between ERGs can be an excellent way to acknowledge and incorporate intersectionality and bolster their potential impact. It may be difficult for someone with many intersecting identities to choose which ERG to join and unfair to ask them to.[90] If there is a collaborative community built around ERG activities, that individual will have more opportunities to participate in programming that is important to them. Combining the work of ERGs through collaboration can also increase their visibility and impact across the organization.[91] The organization can help facilitate collaboration by providing communication channels and systems for collaboration.[92]

Examples of cross-ERG collaboration:

- Regularly scheduled meetings with ERG leaders to compare and collaborate on priorities, programming, and member concerns.
- Networking events with all ERGs.
- Jointly hosted events that provide an intersectional lens.
- Representatives from multiple ERGs attending external events (e.g., recruitment fairs, expos, conferences, etc.), sitting on committees and councils, and advising across the organization.

Collaboration can also come in the form of ERGs with broader identifiers. While these types of groups should not replace ERGs with a more specific focus, multigenerational or multicultural ERGs can create a space where diverse identities and perspectives are a core building block.[93] Another example of collaboration and intersectionality is the intentional inclusion of allies.

As ERGs evolve to be more intersectional and collaborative, they will continue positively impacting organizations and individuals.

Conclusion

Our mandate at the Canadian Centre for Diversity and Inclusion is to assist Canadian employers in creating more inclusive workplaces. We hope that the ideas, strategies, and tactics we have provided in this toolkit are valuable and useful in helping you implement or leverage employee resource groups in your organization.

As ERGs continue to be employed by organizations, there is a growing need for evidence-based decision-making to guide the future development, management, and utilization of ERGs. In addition, as greater clarity is established regarding ERG best practices, standards, and outcomes, both employees and organizations will benefit. We strongly encourage employers who have ERGs to ensure they are using multiple metrics to measure the impact and value of ERGs for their employees and their organization.

If you have great stories to share about your ERGs, please get in touch with us at **research@ccdi.ca**. We would love to hear them.

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