

**"I had an incredible day at our first International ERG Leadership Symposium! We met and learned from an amazing group of leaders in the DEI space. Already looking forward to the next one! "**

Kitty Lei (She/Her)  
Diversity, Equity and Inclusion Program Manager  
Blue Cross Blue Shield of Massachusetts



## EXECUTIVE SUMMARY

All sessions were recorded and are accessible to attendees.



### INTERNATIONAL ERG LEADERSHIP SYMPOSIUM - SPRING 2022

This is a summary of the discussions and main takeaways from the International ERG Leadership Alliance Symposium, June 10, 2022. This document can be freely shared with anyone and accompanies the Attendee-Only Recordings of all main and tracked educational sessions.

#### HOST SPONSOR:



For more information about this Symposium or future ones, please contact us at:  
[info@ERGLeadershipAlliance.com](mailto:info@ERGLeadershipAlliance.com)

#### Please celebrate ELA's Member Organizations:

*working together to make every workplace diverse, equitable & inclusive*

Titanium Member:



Platinum Members:



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Bronze Members:



Ally Member:



Fall 2022 Symposia - October 21 at Amazon HQ in Seattle!

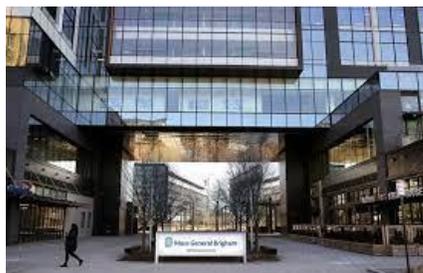
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## Overview

The 3rd International ERG Leadership Symposium was held June 10, 2022, as a hybrid event. Massachusetts General Brigham (MGB) hosted the on-site participants in its new Innovation Center near Boston. Over 200 pioneering ERG champions participated including global heads of DEI, ERG oversight program managers, leaders of individual ERGs and allies. A wide array of types of ERGs/BRGs/ERGs/EIGs were represented as well as industries, organizational size, location and structure.

*\* Employee Resource Group (ERG) will be used through this document to represent all the various names and types of employee groups more concisely. It is not intended to replace the value or intention of other names or types of groups. ERGs are defined as sanctioned, funded and governed groups within an organization.*



### Organizations Represented:

- |                               |                         |                              |                         |
|-------------------------------|-------------------------|------------------------------|-------------------------|
| Aarons                        | Dialpad                 | Kohl's                       | ScottMadden             |
| AARP                          | DraftKings              | LA Dept Water & Power        | Sentinel Technologies   |
| Amazon                        | F5                      | Leapfrog Technology          | Staples Inc             |
| American Confidence Institute | Fastly                  | Lowe's                       | Suffolk University      |
| Bazaarvoice                   | Gallagher               | Mass General Brigham         | The Predictive Index    |
| Beth Israel Deaconess Medical | Ginkgo Bioworks         | Nat'l Credit Union Admin     | The Washington Post     |
| Blue Cross Blue Shield of MA  | Global Partners LP      | Nat'l Hispanic Corp. Council | U.S. Renal Care         |
| Blue Shield of CA             | Hi Marley               | NextRoll                     | Verbate                 |
| Boston University             | Homesite Insurance      | Pride Global                 | WeSpire                 |
| Bryant University             | Husch Blackwell         | PTC                          | Western Governors Univ. |
| Commonwealth Financial        | Inclusive Space         | PURE Insurance               | Wizards of the Coast    |
| Community Transit             | Inter-Amer. Dev Bank    | Riverside CC                 | Workiva                 |
| Datto                         | Intuit                  | Rock On Success              | WP Engine               |
|                               | Jack Henry & Associates | Sarepta Therapeutics         | Yale University         |

## Networking Cafés

Attendees had the opportunity to connect with old and new ERG friends during 3 break times.



Next

**Symposia:** Fall 2022 – October 21 at Amazon in Seattle!

## Agenda

### June 9, 2022 (for on-site attendees)

4:00 - 5:30 pm Welcome Cocktail Reception

### June 10, 2022 (for all attendees)

8:00 am - 8:30 am Registration, networking, lite breakfast

8:30 am - 9:00 am Welcome, introductions, icebreaker, agenda & logistics – Aimee Broadhurst

9:00 am - 9:45 am The State of ERGs: where they are, the future & top issues – Alyssa Dver

9:45 am - 10:00 am Networking café

10:00 am - 11:00 am Mass General Brigham ERG case study – Aimee Broadhurst & Roger Guzman

11:00 am - 12:00 pm Morning Workshops

**LAUNCH:** Building Out a Great Leadership Team

**GROW:** What & How to Communicate About Your ERG - and to Whom!

**THRIVE:** Leveraging Allies for Greater ERG Impact

**PROGRAM MANAGERS:** Ensuring an equitable ERG application process

12:00 pm - 1:00 pm **LUNCH**

1:00 pm - 2:00 pm Afternoon Workshops:

**LAUNCH:** What to Ask and Expect Your Exec. Sponsors to Do

**GROW:** ERG Activity & DEI Metrics – What & How to Measure

**THRIVE:** Developing Your Multi-Year Plan

**PROGRAM MANAGERS:** What and how to oversee without overstepping

2:00 pm - 2:15 pm Networking café

2:15 pm - 3:00 pm Awesome & Easy Ways to Boost Your ERG Engagement & Impact - *featuring experts from:*

**Intuit:** Cecilia Persson-Ramos, DEI Employee Resource Group Leader

**Yale:** Marinda Monfilston, Senior Diversity Coordinator

**Kohl's:** Omar Velaochaga, Diversity and Inclusion, Senior Manager

3:00 pm - 3:15 pm Closing Comments – Alyssa Dver

3:15 pm - 4:00 pm Networking café

## Key Takeaways

In their 60+ years of evolution, ERGs are now critical for attracting and retaining diverse talent by enabling employees to have a deeper sense of belonging and engagement. ERGs are an expected employment 'benefit' that includes professional & leadership development, career connections and a respected voice that directly impacts organizational policy, product development and customer support.

(Learn more about the definition and direction of ERGs by watching the free recorded presentation, [The ABCs of ERGs](#) and reading the [2022 ERG Trends Leadership Briefing](#).)



Some common threads throughout all conversations at the Symposium and overall, in ELA's ongoing [virtual events](#):

1. To gain support and necessary resources, there is an urgency to **educate all the ERG stakeholders** about what ERGs are, what the distinct types of leaders do (and should not do), as well as what resources are needed to succeed. Stakeholders include existing and potential executive sponsors, program managers, leaders of individual ERGs, allies and the overall employee population, including middle managers. While ERGs are proven to help attract and retain high potential, diverse talent as well as increase overall employee engagement and productivity, without consistently clear organizational support, ERG leaders will be unproductively frustrated and ultimately fail.
2. **ERG Leaders are burned out and need to be reenergized.** Understandable from the past few years of social and medical stress, there is now an added layer of stress given the now hybrid work environments and leanness of many organizations. ERG leaders are still subject to high expectations as volunteer leaders and are now being asked to better govern and report on ERG performance. There is legitimate pushback to training and planning requests, especially from experienced ERG leaders. ERG summits, teambuilding events, leadership training and certification are now popular ways to offer perks and productivity support, rather than reporting and planning meetings.
3. The popularity of ERGs has created a positive interest from employees to start new groups that has elevated the need to **be clear on definition of what, how and who can lead a group as well as the application process for starting one.** Many organizations are developing ERG playbooks or operation manuals to inform existing and potential ERG leaders of what the 'job' entails. Well thought-out application and operational process documents help focus DEI resources as well as bring more equity and sustainability to all ERGs.

## Main Session: The State of ERGs



Based on ELA's constant conversations with ERG champions, Alyssa Dver, Founder & Chair of ELA, gave a bird's eye perspective of what is happening with employee groups across industries. Calculating over 821,055 ERGs in the U.S. alone, Alyssa conservatively estimated over 42 million employees are currently active members of ERGs. She also pointed out the increasing development brewing from organizations based outside of the US, many who have no U.S. presence at all.

Alyssa shared some of the recent media and academic research bubbling to the surface that all supports the value and viability of ERGs. She reminded that while leading an ERG it is often very frustrating and all too often unrecognized – is so urgently needed and challenging as all important societal change is. She reinforced how every ERG stakeholder contributes to the casue and how we can and should help one another to power through the times that require us to have energy and confidence. Alyssa pleaded with attendees to take advabntge of all the resources as well as the connections and educational opportunities ELA offers – many of which are free.

The session ended by highlighting the major trends and issues ERG leaders and program oversight managers are wrestling with. Confirmed in realtime by the attendees that these issues are top of their minds, Alyssa noted that the questions often do not have correct answers, but rather a right answer for that organization at that time.

Issues include:

- *Despite the past, how should the overall groups now align with the organization's intentions? (ERG, BRGs, Colleague, Associate, etc.)?*
- *Should faith-based or white men ERGs exist? Is a multicultural ERG inclusive or insulting? Are Asian, Caregiver, and other ERG buckets too broad to be effective?*
- *Should hobby, charitable or professional development groups be entitled to funding if they provide the same sense of belonging as a DEI group?*
- *How do you merge overlapping ERGs when organizations are acquired or how do you stand-up fresh, independent ones when divisions are spun out?*
- *How much funding should ERGs receive?*
- *What is the process for requesting resources and then reporting back ROI?*
- *What happens when the leader is disengaged or not working well? What happens when no one wants to lead?*
- *What are the leadership requirements, terms, and conditions required for maintaining the title, especially if it is compensated?*
- *Do we alienate or exclude employees who are not members, allies, sponsors, or leaders?*

## Main Session: Mass General Brigham Case Study



Aimee Broadhurst, ELA's Vice Chair, interviewed Rogelio (Roger) Guzman, Diversity, Equity & Inclusion-Program Director for Mass General Brigham (MGB) and its 16 networked hospitals.

Roger and the MGB team are working to create a more consistent experience and structure for all 21 ERGs that are now under the MGB system.

MGB's first step has been to create a strong foundation by bringing in the 4 C's (Culture, Community, Career, and Commerce) and then focusing on the ERG Progression Roadmap of Launch, Grow and Thrive. One of the next steps is moving the ERGs from by-laws to more standardized charter documents.

Having a solid foundation and standardization is key to creating system-wide ERGs. One hurdle to system-wide ERGs is the 16 hospitals that now make up the MGB system have operated independently for years; therefore, opening up the ERG Launch Platform across the system is a radical change. The team is starting with yearly action plans with the goal of moving to multi-year plans over the next two to five years.

With standardization comes the possibility of ERGs losing their unique flavor, and MGB is addressing this issue by:

1. Having each ERG complete a yearly action plan, and;
2. Focusing more on strategy and less on events.

To close out the conversation, Roger shared some suggestions for things he wished he knew when you started this work 20+ years ago and how he is looking forward: 1) Ensure you are listening to your ERGs leaders and their membership; 2) Assume positive intentions when employees step into leadership roles; 3) Spend time and focus on the frozen middle managers and help them understand the fundamental value propositions of ERGs and those who step up to lead.

## Break Out Workshops:

Led by [ELA Master Trainers](#) and in-room moderators, onsite and online Symposium participants chose to attend two of the eight interactive workshops based on ELA's [Bootcamp curriculum](#) and [Oversight Managers' Group](#) monthly mastermind meetings:



### Morning Workshops:

**LAUNCH:** Building Out a Great Leadership Team

**GROW:** What & How to Communicate About Your ERG - and to Whom!

**THRIVE:** Leveraging Allies for Greater ERG Impact

**PROGRAM MANAGERS:** Ensuring an equitable ERG application process

### Afternoon Workshops:

**LAUNCH:** What to Ask and Expect Your Exec. Sponsors to Do

**GROW:** ERG Activity & DEI Metrics – What & How to Measure

**THRIVE:** Developing Your Multi-Year Plan

**PROGRAM MANAGERS:** What and how to oversee without overstepping

*These workshops were also recorded and are only available to attendees.*

## Panel Discussion: Awesome & Easy Ways to Boost Your ERG Engagement & Impact

Aimee facilitated this inspiring panel that included these ERG expert and discussion of what they're doing to boost ERG engagement and impact at their organizations.



### Mentorship Program Pilot

**Cecilia Persson-Ramos** - DEI Employee Resource Group Leader, **Intuit**

- The three-month development and collaboration pilot pairs mentors with mentees within three participating ERGs – Intuit Latinos Network, Military Network, and Asia Pacific Network.
- Helps accelerate the development of future leaders by sharing expertise, skills, perspectives, and leadership values through network and collaboration opportunities.
- Seeks to drive engagement and retention, especially critical to our underrepresented employees. If the pilot meets or exceeds success measures, it will be launched and offered to the full Intuit ERG and Mailchimp BERG ecosystem.

### The Power of Recognition and Why It Matters

**Marinda Monfilston** - Senior Diversity Coordinator, **Yale University**

- The Working Women's Network (WWN) is the first affinity group at Yale University to launch a formal recognition program.
- In its 6<sup>th</sup> year, this annual award recognizes up to six women currently employed at Yale who have been exemplary members of the Yale community.
- The individuals receiving this honor (18 staff members to date) have been selected for a wide range of achievements but, overall, have distinguished themselves through a personal commitment to changing Yale.

### Engagement of non-exempt/hourly associates

**Omar Velaochaga** - Diversity and Inclusion, Senior Manager, **Kohl's**

In 2019, Kohls made a conscious effort to open their BRGs to associates in their stores. There are three ways their BRGS have gained momentum with their non-exempt hourly associates

- Volunteerism - instead of telling associates where to volunteer, ask them where and how they want to volunteer.
- Dress Code and swag – making BRGs relevant to the associates every day by launching approved BRG shirts so associates can now wear those shirts to work whenever they want.
- Leader Education and participation – engaging middle management using cultural celebration months, including the positives regarding sales and the importance of managers and their associates having talking points on what, why, and how.

## About the ERG Leadership Alliance (ELA)

ELA delivers expert training, conducts research & creates collaborative opportunities to share best practices across organizations.

ELA's community includes heads of DEI, ERG oversight managers, leaders of individual ERGs, allies & executive sponsors [from all types of organizations around the world](#).

### Memberships

- **Individual ERG Leaders** – Become part of the ELA community and get access to ELA Online, a rich reference library containing all ELA events recordings and plethora of tools, articles and other helpful resources.
- **Oversight/Program Managers** – includes virtual monthly mastermind meetings that are recorded and shared in a private, interactive online community.
- **Organizations** - annual membership provides tickets to Symposia, ELA Online seats and tangibly demonstrates your organization's DEI commitment.
- **Vendors** – Ally with ELA to reach critical ERG buyers and influencers.

### Training:

- **Bootcamps** - Launch, Grow and Thrive curricula delivered via live-led workshops. Offered quarterly in public, open enrollment sessions and in private, customized classes.
- **Eclasses** – Self-paced, online training based on the public ERG Leader Bootcamp curricula.
- **Workshops** – Two- and three-hour interactive workshops for Executive Sponsors, Allies, ERG Leader and overall ERG stakeholders.
- **Coaching** – Get expert thought partnership & accountability support via one-on-one or a small group cohort.

### Certification

- **ERG Leader Certification** - ERG leaders demonstrate their proficiency by presenting their completed worksheets to a board of experts. Three levels: Emerging, Intermediate and Expert Leader
- **Master Trainer Certification** – qualify to teach ERG leaders at your own and other organizations

### Events

- **Virtual Events** - Free, open to the public, typically every other week. Recordings available to ELA Members.
- **Symposia** - hybrid "talk with" events hosted two times each year.

### Resources

- **The ERG Progression Assessment and Roadmap** – find out where your ERG(s) are in their lifecycle and what's next ahead to build strong, sustainable employee groups
- **2022 ERG Trends Leadership Briefing** – read about the current issues and movement of ERG leaders across industries.
- **ABCs of ERGs** – watch the 25-minute recorded presentation about what ERGs are.
- **Books** - "The ERG Handbook" & "Companion Workbook" teaches you how to run a great ERG. Written by ELA's own Vice Chair, Aimee Broadhurst!

**Website:** [www.ERGLeadershipAlliance.com](http://www.ERGLeadershipAlliance.com)

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