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## EXECUTIVE SUMMARY

**"Fantastic event!"**

Ryan Crozier  
Client Manager, Enterprise Major Accounts  
Xerox



### INTERNATIONAL ERG LEADERSHIP SYMPOSIUM - WINTER 2021

This is a summary of the discussions and main takeaways from the International ERG Leadership Alliance Symposium, Dec 3, 2021. This document can be freely shared with anyone and accompanies the Attendee-Only Notes that include videos of all main sessions plus Report Outs from each of the 23 Taskforce tables.

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

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## Overview

The 2<sup>nd</sup> International ERG Leadership Symposium was held December 3, 2021, attracting 150 pioneering ERG champions. Onsite and virtual attendees included global heads of DEI, program managers overseeing ERGs and leaders of individual ERGs. A variety of types of ERGs and people were represented as well as industries, organizational size, location and structure.



### Organizations participating:



- |                               |                                  |                              |
|-------------------------------|----------------------------------|------------------------------|
| Achievers                     | Federal Aviation Admin (FAA)     | Norton LifeLock              |
| Amazon                        | FourSquare                       | New York University (NYU)    |
| American Confidence Institute | Gallagher                        | Pegasus Senior Living        |
| American Family Insurance     | Google                           | Pride Global                 |
| American Heart Association    | Hertz                            | REI                          |
| Amplify                       | Home Depot                       | Rent-A-Center                |
| Amtrak                        | Humana                           | Respario                     |
| Bank of America               | Inclusive Space                  | Rock On Success              |
| Bell Textron Inc              | InterAmerican Development Bank   | Southern Glazers             |
| Berkely Labs                  | J.M. Smucker Co.                 | U.S. Renal Care              |
| Boy Scouts of America         | Lexia Learning                   | VisitDallas                  |
| CBRE                          | Lincoln Center                   | Western Governors University |
| C. H. Robinson Company        | Lockheed Martin                  | Xerox                        |
| Citi                          | Mass General Brigham             | Yale University              |
| Dallas College                | McDonald's                       | Zillow                       |
| Danaher                       | Nat'l Hispanic Corporate Council | Zumper                       |
| Experian                      |                                  |                              |

***"This was my first hybrid conference, and it was absolutely amazing and engaging. And I'm so thankful that I and our leaders had this experience to be reminded about the important work we are doing and that they are not alone. Thank you so much!"***

Marinda Monfilston  
Diversity Program Coordinator  
Yale University



## Agenda

### Dec 2, 2021 (for on-site attendees)

4:00 - 5:30 pm Welcome Cocktail Reception

5:30 - 8:30 pm [Parade of Lights](#)

### Dec 3, 2021 (for all attendees)

8:00 – 8:30 am Networking Café

8:30 – 9:00 am Opening: Remarks & Introductions

9:00 – 10:00 am ERG Case Study Interview: **AMAZON**

10:00 – 10:15 am Networking Café

10:15 - 11:00 am **Optimizing Executive Sponsors**: featuring Mark Stephanz, Former Vice Chair of Bank of America, executive sponsor and ally to several groups in and outside the bank

### 11:00 am - 12:00 pm **Taskforce Tables - Round 1**

*Each attendee picks & participates in one in the morning and one in the afternoon:*

- *Metrics - What are the critical things ERGs should be measuring and reporting?*
- *Allyship - How do you recruit, train and recognize allies?*
- *Executive Sponsors - What to do when your Executive Sponsor isn't meeting your ERG needs?*
- *Intersectionality - What processes, metrics and expectations should be in place across ERGs?*
- *Engagement - How do you get members more involved in programs and other activities - virtually and in person?*
- *Leader Burnout - How do you recognize and prevent it?*
- *Programming - How do you decide what programming is 'good' for both members and the ERG?*
- *Non-Exempt Employees and ERGs - How to involve hourly employees given organizational policy and member ability to participate?*
- *Employee Health and Wellness - What and how much wellness programming should ERGs offer their members?*
- *Expanding Your ERG Footprint - When and how to expand locally and globally?*
- *Managing Your Leadership Team - How to motivate, measure and mentor your volunteers?*
- *Recruiting New Members - Where and how to invite employees to happily join your ERG?*

12:00 – 1:00 pm Lunch & networking

### 1:00 – 2:00 pm **ERG Taskforce Tables - Round 2**

2:00 – 2:45 pm **ERGs First & Future: A retrospective and prospective** chat with Yetta Toliver, Xerox's Global Head of Diversity, Inclusion and Belonging (DIB)

2:45 – 3:00 pm Closing remarks

3:00 – 3:30 pm Networking Café

## Key Takeaways

ERGs have been around for 60+ years but are now more critical than ever for attracting and retaining diverse talent by enabling employees to have a deeper sense of belonging and engagement. ERGs are now a necessary, expected 'benefit' that includes professional & leadership development, critical career connections and a respected voice in organizational policy, product development and customer support.

(Learn more about the definition and value of ERGs from our free recorded presentations, [The ABCs of ERGs.](#))



1. To fully gain and sustain momentum, ERGs at least need:
  - active executive sponsorship with people genuinely interested and engaged, not 'voluntold'
  - their leadership team to be recognized and encouraged by their "day job" managers and in their overall performance reviews
  - to be promoted throughout the organization including employee onboarding, executive meetings, and annual reports
  - structure, policies and governance to ensure efficient operations as well as smooth and successful leadership transitions.
  
2. The names of the groups vary reflecting the business and cultural fit within an organization (i.e., Business Resource Groups (BRGs), Affinity Groups, Employee Networks, etc.) Most define ERGs aligned with 'protected classes' but extend to other demographic commonalities such as young professionals, wellbeing/mental health and caregiving. Some organizations extend the definition to include hobbies and social clubs designed to connect like-minded employees. These definitions, however, can impact funding, ROI and overall ERG governance so organizations need to consider which ones suits their culture and objectives best.
  
3. Metrics are urgently needed to monitor ERG success and support funding requests. However, different measurements are needed by individual ERG leaders vs. oversight managers/DEI. There were many discussions about how to collect and present the right ERG data and how to ensure it is accurate. Much of the discussion was about types of software that can be used to capture and integrate ERG-relevant data as well as other ways such as video to gather qualitative/anecdotal information to enable emotional engagement through storytelling.
  
4. ERGs are actively wrestling with how to compensate/recognize ERG leaders, manage intersectionality, allyship, and creating better synergy across ERGs. The great news is there many best practices emerging and people eager to share!



## Session 1: Opening Remarks & Introductions



Alyssa Dyer, Founder & Chair of ELA welcomed everyone both onsite and online to the day. Her message reinforced the how ERGs enable more engaged, empowered and confident employees.

Alyssa also discussed the challenges still present to obtain reasonable budget and executive support needed to sustain healthy ERGs.

She rallied the attendees to recognize their pioneering work is hard, often thankless and frustrating, even depressing. But she reminded the attendees that their work really mattered and that they were gathered there with the exciting opportunity to "make history together by practicing what we preach and use our diverse and synergistic expertise to move ERGs forward so that all workplaces can be truly equitable and inclusive."

Attendees were then invited to respond to the fill in the blank prompt:

**"I believe ERGs can\_\_\_\_\_."**

The following word cloud represents many of the answers captured:



*"I learned so much in how to engage executive sponsors, and I'm super excited about implementing some of the things I learned today into our ERG programming for 2022."*

Ninh Nguyen  
DEI Program Manager  
Foursquare

## Session 2: Amazon Showcase Interview

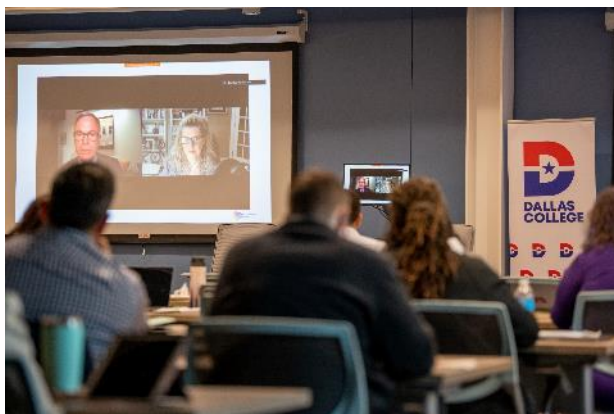
Aimee Broadhurst, ELA's Vice Chair, interviewed Anna Eftin, who oversees Amazon's 900+ ERG chapters.

Some key aspects of the Amazon journey:

- The structure of Amazon Affinity Groups is unique due to the size and complexity of the company. This includes multiple lines of business and many non-exempt employees. In addition, Anna described Amazon's unprecedented growth in Affinity Group chapters from 300 beginning in 2020 to almost 900 today.
- With this unprecedented growth, Amazon is including the voice of the customer (Affinity Group leaders) to seek out best practices and use the great work already done to create and maintain a scalable structure.
- Another key takeaway is working to meet employees where they are by using things already in place - For example, using an internal app that all employees have access to connect with them about Affinity Groups.
- Executive Sponsors at Amazon are two levels – C-suite execs and VP-level executives. This provides Affinity Groups with the visibility and voice in the C-Suite and a VP who is more readily available to advise, meet with, and coach Affinity Group leaders.
- Even though Amazon is an extremely large corporation, organizations of any size can benefit from focusing on ways to meet employees where they are and advancing best practices current ERGs have created

## Session 3: What Executive Sponsors Need from ERGs!

The attendees watched a brief video interview with Mark Stephanz, former Vice-Chair of Bank of America. Mark described his experience as an executive sponsor to 2 ERGs and participate in what remains one of the most respected ally programs.



Mark also raised the risks and challenges that Executive Sponsors face including subsequent stigmas and biases. The group acknowledged that Executive Sponsors also need a sense of belonging so that aligning with an ERG at their career level can be tricky. Executive Sponsors must balance their allegiance with the ERG objective while maintaining a business-focused perspective. A major suggestion for success was to build a trusting relationship between ERG leadership and Executive Sponsors. Both sides need to understand each other's motivations and

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priorities as well as how they can best serve one another. With fluid communication, they can best set expectations, prioritize tasks and respect each other's extremely limited time and actual abilities.

After viewing, the attendees discussed the role of an Executive Sponsor that includes

- providing help with funding
- advocating for C suite decisions
- being a relatable role model for ERG members

The group also discussed what Executive Sponsors want as well as typically get out of their role such as the opportunity to help others avoid the same pitfalls, helping to progress human rights for people just like them, and the ability to learn and grow as a more aware leader.

## Session 4 & 5: Taskforce Tables



Attendees broke into 12 hybrid groups to focus together on a pre-selected topic of their choice:

- **Metrics** - What are the critical things ERGs should be measuring and reporting?
- **Allyship** - How do you recruit, train and recognize allies?
- **Executive Sponsors** - What to do when your Executive Sponsor isn't meeting your ERG needs?
- **Intersectionality** - What processes, metrics and expectations should be in place across ERGs?
- **Engagement** - How do you get members more involved in programs and other activities - virtually and in person?
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Each group discussed a set of provided prompts to jointly figure out what and how to tackle the issues at their respective organizations. **A specific set of Taskforce Table Report Outs included in the Attendee-Only Notes.**

## Session 5: ERGs First & Future: A retrospective and prospective chat with Yetta Toliver, Xerox's Global Head of Diversity, Inclusion and Belonging (DIB)

In the final Symposium session, Alyssa interviewed Yetta to discuss why and how Xerox created the very first ERGs in the 1960s! Yetta shared the originals of the Black Employee Network (BEN) which still is active today and subsequently spawned other ERGs at Xerox and everywhere else!



Employee groups at Xerox continue to evolve as they are looking to create more consistency in governance and measurement. Despite – or in some way because – they have such a long history operating success ERGs, Xerox is equally still pioneering best practices to respect the progress as well as the opportunities brought on by the current social, political and environmental priorities of their diverse and global employee base. Yetta predicted that ERGs will continue to be forefront in DEI strategy and provide invaluable insight into customer needs as well as market opportunities. She noted the urgency to share best practices and yet be flexible to each organization and each ERG's unique cultural needs.

## Networking and Café

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



***"It was amazing! Thank you 🙏 I have to say I was skeptical - some of these forums are nice to have, but you don't walk away with much more than an uplifting feeling that lasts one day. I loved the participants and the takeaways!"***

Martina Hranova  
Inclusion and Diversity Champion  
NortonLifeLock

## Future Symposia:

- **Spring 2022 @ Mass General Brigham in Boston**
- **Fall 2022 @ Amazon in Seattle**



## About the ERG Leadership Alliance (ELA)

Known as "The ERG of ERGs," the ERG Leadership Alliance (ELA) is the largest association of employee group leaders, diversity experts & allies providing expert "how to" training, tools & events for ERG leaders.

ELA's community includes the most respected brands. [See a partial list here.](#)

### Training:

- **Bootcamps** - Launch, Grow and Thrive curricula delivered via live-led workshops (public or private) and self-paced eclasses.
- **Programming** - ELA offers relevant professional development workshops for your ERG leaders, members, executive sponsors & allies.
- **Books** - "The ERG Handbook" & "Companion Workbook" teaches you how to run a great ERG. Written by ELA's own Vice Chair, Aimee Broadhurst!

### Collaboration

- **ELA Online** - on-demand reference library with all ELA's event recordings and tools.
- **Oversight Manager's Group (OMG)** - monthly masterminds and private online community
- **Virtual Events** - Free, open to the public. Recordings are available only to ELA Online subscribers.
- **Symposia** - hybrid "talk with" events hosted two times each year.

### Enrichment

- **Certifications** - ERG leaders demonstrate their proficiency by presenting their completed Launch, Grow or Thrive worksheets to a board of experts.
- **Coaching** - Get expert thought partnership & accountability support via one-on-one or a small group cohort.
- **Research & Data Collection** - Critical for ERG planning and funding, ELA shares its own and partner research.

### Alignment

- **Sponsor** - Associating with ELA through an annual or host sponsorship tangibly demonstrates your organization's DEI commitment to all stakeholders.
- **Ally** - Partnering with ELA enables joint programming, promotion & research with other organizations also aiming to improve workplace diversity, equity & inclusion.

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

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