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Employer Assistance and Resource Network on Disability Inclusion AskEARN.org

A Toolkit for Establishing and Maintaining Successful Employee Resource Groups

ODEP Office of Disability Employment Policy

The Employer Assistance and Resource Network on Disability Inclusion (EARN) is a resource for employers seeking to recruit, hire, retain and advance qualified employees with disabilities. It is funded by the U.S. Department of Labor's Office of Disability Employment Policy under a cooperative agreement with The Viscardi Center. For more information, visit AskEARN.org.

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Toolkit for Establishing and Maintaining Successful Employee Resource Groups

This informational toolkit was prepared in recognition of the increasing number of employers expressing an interest in developing or enhancing Disability Employee Resource Groups.

Regardless of company size or industry, the best and most effective way to undertake or maintain new business initiatives is by learning from the success of others.

This Toolkit outlines twelve steps on how to start, implement, and maintain Disability Employee Resource Groups.

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THE IMPORTANCE OF EMPLOYEE RESOURCE GROUPS

As America's minority population continues to expand and evolve, so does the desire for a corporate environment that is equitable and fair for all employees. Increasingly, companies are establishing internal organizational structures to address the unique needs and issues of this diverse workforce. These structures, known as Employee Networks, Affinity Groups or Employee Resource Groups (ERGs), are found in 90 percent of Fortune 500 companies and are gaining additional business support throughout the country. These groups offer employees an opportunity to network, address common issues and concerns, and receive support from those who share similar backgrounds, experiences, or interests. ERGs are most effective when senior management is involved and an Executive Sponsor or Champion is assigned to lend support. Senior management participation also serves as an excellent opportunity for a CEO or other executives to be in touch with the workforce and link the group's mission to specific business goals.

The catalyst behind the establishment of ERGs is common interest and a desire to create a positive workplace culture where employees and business partners with different backgrounds, lifestyles, and abilities are respected, have equal rights, and are given the opportunity to succeed. Although these groups are generally initiated by employees, they bring significant business value as they convey a broad range of diverse perspectives that can be leveraged for product development and marketing. Furthermore, recognizing and respecting the talents and contributions of all employees increases morale and maximizes retention and productivity, critical factors that impact the bottom line while raising an organization's profile in the community.

Historically, most companies started these initiatives with African American and women's groups, followed by Latino and Asian employees. With changes in regulations and the composition of the workforce, companies began developing groups for Lesbian, Gay, Bisexual and Transgender (LGBT) employees, employees with disabilities, religious and generational groups and veterans. It is important to note that most resource groups are inclusive, allowing anyone to join.

According to the Society for Human Resource Management, ERGs offer employers excellent opportunities to recruit and retain diverse talent and profit from the wide range of thoughts, perspectives, cultures, and experiences they bring to the workplace. This rich diversity is especially important in today's global economy as it allows companies to extend their reach and understanding of the world marketplace.

Internally, ERGs can be instrumental in improving workplace culture and shedding light on specific issues or barriers that may negatively impact certain groups of employees. For example, Disability Employee Resource Groups may share information on appropriate etiquette; assist in promoting physical and virtual accessibility; offer guidance and insight on the types, costs, and availability of accommodations; and dispel myths and misconceptions about the abilities and talents of persons with disabilities. They may also be a resource to employees who have family members with disabilities and serve as role models and mentors for newly hired or recently diagnosed employees with disabilities. Lastly, they may serve as built-in focus groups for developing and testing new products and services designed for customers with disabilities. This has been the case, for example, at Ford Motor Company, where resource groups have provided input for vehicle design and advertising campaigns, and at Hewlett Packard (HP), where the Disability Resource Group conducted accessibility testing of products.

Employee Resource Groups are a functional, strategic tool for advancing organizations' diversity initiatives, including the recruitment of diverse talent. At Ford, as well as HP, members of the ERGs participate in college fairs alongside company recruiters to connect with diverse candidates. At Ely Lilly, ERG members compiled information about their local communities to assist recruitment staff in marketing job vacancies to a broad range of potential applicants.

Each of these examples illustrates a strong link to a strategic business objective and demonstrates the significant value that ERGs may bring to their respective companies.

GETTING STARTED

STEP 1: START AT THE TOP – GAIN THE SUPPORT OF CORPORATE EXECUTIVES

ERGs are company-sponsored entities comprised of employees who have at one time felt underrepresented in the workplace. Although these groups are typically initiated by employees, it is critical to gain top management support and to identify an Executive Sponsor. From the beginning, interested employees should reach out to top-level management, such as a Chief Executive Officer (CEO), Chief Financial Officer (CFO), Chief Operating Officer (COO), President, Vice President or other corporate leaders who may have a specific interest in the mission of the group. Companies utilize different strategies for assigning Champions. For example, at Verizon, Executive Champions are chosen by the Employee Resource Group while at Ford, each group is assigned one. Merrill Lynch also assigns its Executive Champions and rotates them every three years to ensure that they are exposed to as many employees as possible. Additionally, many companies make it a point to designate an Executive Champion who is not a member of that interest group.

At this stage the following actions should be taken:

- Create a business case for the Employee Resource Group
- Articulate a mission statement which is tied to a business objective
- Draft a tentative plan to accomplish your goals
- Prepare a preliminary budget
- Secure executive sponsorship
- Share the group's objectives with employees and management
- Establish a leadership team
- Communicate to staff that member enrollment is voluntary

STEP 2: CREATE PARTNERSHIPS WITH EXISTING INTERNAL DIVERSITY TEAMS

The new ERG should network and partner with internal diversity groups already in place at the organization. Request permission to attend meetings or to meet with the Executive Sponsor and group representatives to share your ideas, obtain feedback, and build relationships.

Find out:

- How the group was started?
- Who they reached out to and how?
- What steps were taken to seek approval?
- What obstacles may have been encountered along the way?
- How were those obstacles managed?
- When and how often are meetings held?
- What are the typical meeting agendas?

STEP 3: GET EMPLOYEES INVOLVED

ERG leaders should draw up a plan and work with their team to develop outreach strategies and generate interest for joining the group.

The following steps are suggested to reach this objective:

- Develop materials to introduce the group
- Advertise the Employee Resource Group through: company newsletters, email blasts, company intranet, flyer inserts with paychecks, events, ads on interoffice note-boards and networking with staff.

STEP 4: DEVELOP BUDGET AND SECURE FUNDING

Once the goals of the ERG are established and agreed upon, prepare a budget that would support implementation and submit it to the Executive Sponsor. Since this individual represents upper management, he or she may be in the best position to advocate for the group and to secure the funding needed to carry out its stated mission and goals.

In order for the group to be perceived as part of the organization, it is critical to obtain financial support. Information compiled from leading companies indicates that most allocate funds for their own Employee Resource Groups. However, it is advisable to consider other methods of funding.
These may include:

- Employee membership fees
- Funding from the company's national diversity budget
- Funding from representative departments
- Funding from annual grants provided by the Human Resource Diversity Department

IMPLEMENTATION

STEP 5: NAME THE GROUP

The name of the ERG should reflect the group's mission and values and should be decided upon collaboratively.

Making this decision may include:

- Soliciting name recommendations from the group
- Having a meeting to discuss ideas or an alternative method for making suggestions
- Choosing a name that reflects the purpose or values of the group
- Ensuring that this name clearly communicates the mission of the group and is interesting enough to make someone want to learn more or join

Once the name of the group is chosen, send an interoffice email to inform staff that there is a new Employee Resource Group available.

STEP 6: SET MISSION AND GOALS

The mission and goals should be established in collaboration with all ERG members and be linked to specific business goals. Together, they should communicate both the organization and the group's core values and common interest.

While the mission defines the overarching purpose for which the group was established, the goals should clearly articulate specific activities and timelines.

The following questions should be addressed when setting the mission and goals:

- What are the core values of the group?
- How is this group different from other groups in the company?
- What steps need to be taken to achieve the group's mission?
- What are the short and long term goals?
- What resources are needed for each goal?
- Who will take the lead in the implementation of each goal?
- What are reasonable and achievable timelines?

STEP 7: DESIGN STRUCTURE

The structure and meeting schedule should be decided by the group with the input and support of the Executive Sponsor.

Below are suggested steps for organizing the group's structure and meeting schedule:

- Create an alternate plan for those who may not be able to attend in person (e.g., teleconferences)

- Determine the day, time, length, and frequency of Meetings
  - Select a location
  - Consider specific roles for members
  - List the roles and discuss with the group
  - Designate member(s) to:
    - Lead meetings
    - Create meeting agendas
    - Share agendas with members prior to meetings
    - Send reminders to members and staff regarding the meeting place and time (ensure locations are accessible for everyone)
    - Receive responses and track attendance
    - Take notes and send minutes before the next meeting

STEP 8: CREATE AN INNOVATIVE BUSINESS SOLUTION

Identifying a special feature for the program is critical to generating interest, fostering participation, and enhancing attendance. Defining this special feature in the context of a business solution creates added value and increases support and recognition for the group. For example, setting a goal to establish a cadre of mentors to guide newly hired persons with disabilities or for employees or caregivers who manage newly diagnosed impairments may significantly improve productivity and job retention. Community involvement is another goal with high visibility that may enhance the company's external image with diverse groups and organizations. Serving on boards or participating in special events promotes overall brand recognition while establishing the company as an employer of choice, with the former contributing to increased market share and the latter to talent acquisition. Brainstorming with group members will help generate ideas that will give a unique focus and purpose for all to work towards.

Following are a few steps for consideration in meeting this goal:

- Send out an invitation for a brainstorming session
- State the purpose of the session so members are prepared with ideas
- Set up an alternative for members who cannot attend to share ideas
- Assure members that all ideas will be considered and respected
- Record all concepts/ideas
- Group like concepts together
- Eliminate, through consensus, ideas that do not fit
- Have all members vote
- Adopt the consensus idea and disseminate company-wide

STEP 9: CHALLENGES

If faced with challenges during development, implementation, or maintenance, identify the root causes and then take steps to reduce or eliminate them.

As a group, members should take the following steps:

- Define the challenge
- Analyze the cause
- Explore solutions
- Decide whether the challenge is worth solving
- Take action to overcome the challenge
- Consider the necessary steps to avoid similar challenges

Examples of challenges may include:

- Obtaining senior level support
- Recruiting employees
- Maintaining member participation
- Managing work schedules
- Addressing meeting conflicts
- Securing funding
- Dealing with lack of resources
- Increasing membership

STEP 10: MAINTAIN MOMENTUM

Ongoing company and member support is vital to success. The ownership for maintaining the momentum resides with the entire group, including the Executive Sponsor.

The following tips may be used to maximize efficacy and ensure continued momentum:

- Establish credibility by adhering to mission, objectives, and timelines
- Communicate the group's efforts utilizing all internal resources
- Continue building a network to increase enrollment
- Create visibility by conducting or participating in special events
- Respond to challenges and remove obstacles

Suggested activities that may help to maintain momentum and sustainability can include:

- In-house networking events
- Workshops on topics related to the program (e.g., Lunch & Learn seminars, National Disability Employment Awareness Month celebrations, etc.)
- Engagement with outside agencies (e.g., volunteering, mentoring, serving on boards, etc.)
- Monthly updates on program status

Suggested in-house resources:

- Company newsletters (related articles, tips)
- Intranet
- Notice boards
- Email blasts and blogs
- In-house T.V. streaming of the ERG's upcoming events and event highlights

STEP 11: LEVERAGE RELATIONSHIPS WITH OTHER INTERNAL RESOURCE GROUPS

Employee Resource Groups are internal networks that represent a community of team members who share a common interest relating to such characteristics as ethnicity, gender, nationality, culture, disability, or sexual orientation. These groups may form relationships with one another in order to gain additional visibility and increase impact.

Ways to leverage relationships with other internal resource groups may include:

- Maintaining an ongoing partnership with the leadership of other groups
- Keeping open communication with members from these groups
- Exchanging or sharing information and resources
- Collaborating on community and professional events and activities
- Disseminating ERG announcements of news and upcoming events
- Sharing financial resources
- Reporting progress
- Sharing best practices
- Establishing partnerships with other business leaders that have a vested business interest in the group

STEP 12: MEASURE SUCCESS

To measure success, the group first must establish goals and success criteria (benchmarking). These will ultimately define how the group has done and what it has delivered. The group's goals and success criteria should be easily understood, support the mission, and be measurable.

Some success criteria for consideration may include:

- Recruiting 10 new members per year
- Publishing a quarterly newsletter
- Conducting one annual event
- Designing two group activities
- Increasing participant attendance at meetings and events

CONCLUSION

With a clear business focus, Employee Resource Groups can be strategic partners that contribute significantly to an organization's overall success and profitability. As with any effective business practice, ERGs must be carefully planned, well managed, and have clear and measurable outcomes. They have been most effective when senior management was involved and an Executive Sponsor or Champion assigned to lend support and link the group's mission and work directly to business goals. Operating a successful ERG is an on-going process, which requires continuous nurturing, but the benefits derived are well worth the effort.

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