



How to Start an Employee Resource Group

peptalk^{her}

What is an ERG?

ERG stands for Employee Resource Group, and can also be known as affinity groups, business network groups, or your company may even call it something else. Whatever they're called, at the most basic level, these organizations provide necessary "safe spaces" for employees to connect & discuss challenges and solutions.

ERG's are groups of employees who join together in their workplace based on shared characteristics or life experiences. Common ERG's could be based on gender, race, sexual orientation, working parents, veterans, and more.

Why start an ERG?

- Opportunities for leadership, problem-solving, innovation at the company, regardless of your seniority level
- Personal and professional development
- Having an impact on the company (retention, culture, morale)
- Working closely with and getting noticed by senior management
- Potential for raises and a promotion

Why an ERG is good for your company?

- Culture
- Retention
- Recruitment



How to start an ERG group in 5 easy steps:

- 1. Garner interest from the company**
- 2. Define your mission & goals**
- 3. Find an Executive Sponsor**
- 4. Get official company approval**
- 5. Promote your ERG internally**

*Check to see if your company already has a specific process in place. If so, follow their process.

1. Garner interest from the company

- Find a group of passionate individuals interested in joining your ERG
- Establish a Leadership Committee
 - Discuss potential roles given the members' strengths. These could be roles such as: Chair, Vice Chair, Secretary, Finance; Events Chair, Operations, Recruitment.
- Set the date of your inaugural meeting (which can be a kickoff party) & plan it
 - Planning your first event can be overwhelming. We have provided a checklist of to-do's in this workbook



2. Define your mission & goals

□ Write a mission statement

- A mission statement is a formal summary of the aims and values of the group.
- Can include: creating community, having a safe space, advancing awareness for your group, creating professional development opportunities for the members of your ERG, and more.
- Examples include:
 - The mission of **[ERG Name]** is to provide professional and social networking for employees of color.
 - **[ERG Name]**'s mission is to promote hiring, retention, and career advancement opportunities for women employees through education, training, and support networks.
 - **[ERG Name]** aims to promote a positive and inclusive environment for all employees, regardless of sexual orientation or gender identity through education, networking, and workplace collaboration.

□ Goals

List 3-5 short term goals (within 6-12 months) and 2-4 long term (in 1-5 years) goals that you hope the ERG will accomplish. Define what would success look like.

- These goals are important to establish at the beginning and you should refer back to them often. Whether quarterly, semi-annually, or annually, you should track the success or meeting your goals and submit reports to HR and the company's leadership team.
- Follow our template on the following page for formulating your goals, strategies, and outputs.

□ Plan your yearly budget

- There's no way around it- you'll need financial help
- to succeed. Your budget can include snacks/refreshments for meetings or events, trainings, attending outside events, paying guest speakers, bringing in external experts to run workshops, and swag (for events or for members).
- We've found from the clients we've worked with, on average, ERG groups have a yearly budget ranging from \$10K - \$50K per year for small to medium sized businesses. We have worked with Fortune 500 companies as well whose budgets can get up to 6-7 figures, depending on the number of people in the organization.



2. Define your mission & goals

□ Detail your goals, strategies and outputs

- This structure is a clear and concise way to think through your ERG. It will also be helpful when presenting to your Executive Sponsor and senior management. It shows you have thoroughly thought through the impact the ERG will have on your company.

Goals	Strategies	Outputs
<p>Everything you hope to accomplish within a certain period of time.</p> <p>Examples include:</p> <ul style="list-style-type: none">• ERG to have # members• Make # of diverse hires• Hold # of events (such as speaker series, training, volunteer work)• Establish an annual project• Build a mentorship program• Push the senior leadership team to implement additional programs and/or benefits for employees.	<p>Strategies are the “HOW” – how you’ll get from a Goal to an Output.</p> <p>For example, what are the details of the events you want to host, how will you find a speaker, how will the event move you closer to overall goals of the ERG?</p>	<p>Achieving goals and producing outputs clearly shows the ERG group is accomplishing what they have set out to do. This makes it easy for leadership to support, and give budget.</p> <p>Examples include:</p> <ul style="list-style-type: none">• Hosted 2 events in Q1 with xyz number of attendees hosted by our sponsor• ERG read xyz relevant book in Q2• ERG members organized attended a relevant training session

3. Find an Executive Sponsor

□ Find an Executive Sponsor:

An Executive Sponsor is not a member of the ERG, but is your connection to senior management. They will help you with guidance and connections.

- Decide on a senior leader that you think would be a great Executive Sponsor
 - Preferably someone who works closely/directly reports to the CEO and is connected to the ERG's mission.
- Make sure to communicate that there are opportunities for senior management engage. Open up certain events to senior management and ask them to attend. This will increase their visibility and commitment to company ERGs.

□ Planning Meeting

Ask for a 10-minute meeting to discuss the ERG's mission/goals, proposed budget, and if they would be a Sponsor. Would require 1-2 hours/month of their time.

- Getting the Executive Sponsor's help with your budget will be pivotal in getting approval



4. Get official company approval

- Meet with HR to get it on their radar. Tell them you will meet again for final approval from leadership.
 - Check your company's policies on ERGs - they might already have guidelines on when the group can meet (outside work hours/lunch) and how often.
- Work with your Executive Sponsor to get approval from the leadership team



5. Promote your ERG internally

Meet with HR to get the approval of the ERG and its budget

- You will reiterate mission, goals, and objectives. Discuss expectations from members including time commitment, and meeting dates/times.

Announce on whichever communication channels are best within your company

- Can include email newsletters, internal chats, Slack, posters or digital screens
 - Take a look at our email proforma template below for promotion
- Make sure to include inaugural meeting date, mission, and goals
- Discuss with HR to make sure your ERG is included in the onboarding documents for new hires.
- Remember that ERGs might have a target audience in mind, but they are open to everyone. Be sure to use inclusive language in your messaging.

Hello,

My name is [NAME] and I am a [Title] at [Company]. I am so excited to announce the formation of [Company]'s newest Employee Resource Group, [ERG Name], with our Executive Sponsor, [Executive Sponsor Name, Title].

Our mission is [Mission Statement]. With a focus on [specific group], this group is open to all! We will have [quarterly] meetings and events, so membership will require [# hours/month].

We would love for you to attend our upcoming event, [Event Name] on [Date] at [Time], taking place at [Location]. We will be discussing [A] and [B], and you will leave with a new understanding of [C]. We have some incredible speakers lined up:

- [Speaker Name], [Title, Company] – [very brief description on why they're great]

Hope to see you there! Please RSVP by [replying to this email/filling out this form] by [date].

Best,

[Your Name]

*[Ideally, attach a graphic promoting the event with details. You can also use that graphic to advertise throughout your company, whether via posters, or posting digitally]

**Congrats -
You did it!**



Things to keep in mind

Diversity

- If you make the group exclusive and represents a single, specific dimension of diversity, you'll end up "preaching to the choir". Make sure your ERG and/or events are open to all.

Communication

- Decide how you will communicate with the members whether via email or perhaps a Slack channel.

Tracking success

- Appoint a committee member to set up an attendance system and track
- Work with your Executive Sponsor to set up tracking for quantitative data such as retention rates, employee engagement levels, and promotion rates to understand how the ERG is impacting the organization.
- After events, write a recap including the type of event, topic, speakers, number of attendees, key takeaways, and a few photos.
 - Create surveys for members to gather feedback on events (we love Typeform by google surveys is free & good too)
- Decide on quarterly, semi-annual, or annual meetings with the CEO and/or Senior Executives and HR (with your Executive Sponsor) to discuss progress/performance.
 - Create reports to track success and present at these meetings.
 - You can provide photos from events to the Executive/Corporate Communications teams in case useful for them to use on company social media, board reports, newsletters etc.

Realistic expectations

- It's okay to start off small and grow slowly.



Planning your first event

□ Date/Time/Location

- Make sure it's convenient for your colleagues, but outside of work hours.
- It's important to leave time at the beginning and the end for attendees to meet & greet
 - Get name tags so everyone knows each other!
- An example agenda could look like this:
 - 5:30-6:00pm: Meet & greet, snacks provided
 - 6:00-6:30pm: ERG overview, panel discussion, Q&A
 - 6:30-7:00pm: Continued networking, attendee departure

□ Content & Speakers

- The leaders of the ERG should introduce themselves, explain their roles, and who the main point of contact is. Make sure to reiterate the ERG's mission, goals and time commitment.
- Make sure panel it's diverse in terms of backgrounds, ethnicities, age & experiences. (If you need help with speakers, PepTalkHer has a wide network of incredible and diverse speakers we work with. Feel free to reach out to us at hello@peptalkher.com)
- Some Panel and Session topic ideas are on the following page

□ Food & Beverage

- Does your company have an in-house catering service? If yes, your company might prefer for you to use them, so make sure you confirm.
- If not, do some research on some catering companies in your area. (We like always including vegan & vegetarian options as well as non alcoholic options to be inclusive)
 - Try to use vendor that reflect the mission of your ERG. For example, if your ERG is focused on women, try to use women-owned companies.
- Check with HR to make sure you're clear on your company's policies on alcohol being serviced at company functions.

□ Swag

- Creating swag items for your Employee Resource Group will attract new attendees and create a sense of pride and belonging amongst members. For example: T-shirts, notebooks, water bottles
- Make sure to include swag costs in your budget

□ Content

- If it's not on social media, did it even happen?!?! We recommend taking photos or hiring a professional. They can be used to promote future events, for your sponsor and executive team to use in newsletter, board reports, social media, LinkedIn etc
- Video footage is also great if you have someone in house or on the team who can help with this.

Panel and session topic ideas:

Speed Networking:

- Set up a “speed dating” type event with senior leaders at your company. Attendees can meet and network with them for 3 minutes, then repeat process a few times so people meet several people
- Feel free to include sample question print outs such as: What is your favorite part of your job? What's been your biggest career struggle and how do you overcome it? I checked out your site/LinkedIn/ social media profile, and saw that you (name specific experience). Can you share some insights into how you accomplished that?

Management training

- Training for those who are stepping into leadership positions and managing teams for the first time.

Public speaking

- Public speaking is one of the world's biggest fears. Learn skills on how to overcome your fear and present with gravitas – presence, persuasion, and power.

Culture and Belonging

- Cultivate inclusion and a culture of belonging at your workplace by hosting a workshop. This can include “Unconscious Bias” training, culture workshops, and more.

Negotiations

- Whether negotiating your next raise with your boss or to make your company more money through better negotiation in a big deal with a client, learn how to sharpen your negotiation skills.

Imposter Syndrome to Success

- Authentic conversations around what different leaders in the business have experienced in their career relating to imposter syndrome - how did they over come this? And what can your ERG learn from their stories?

D&I recruiting events

- Help your company recruit more diverse incoming candidates by hosting a recruiting event. It can include a panel of key leaders at your company, networking sessions – and don't forget some snacks!•

Cross-Cultural Events:

- Collaborate with other ERG groups or external groups to learn
- Could include calendar-based celebrations such as Chinese New Year, Black History Month, and International Women's Day.

**All of these topics are offered as trainings by PepTalkHer.
Contact hello@peptalkher.com for more info!**

Useful Resources

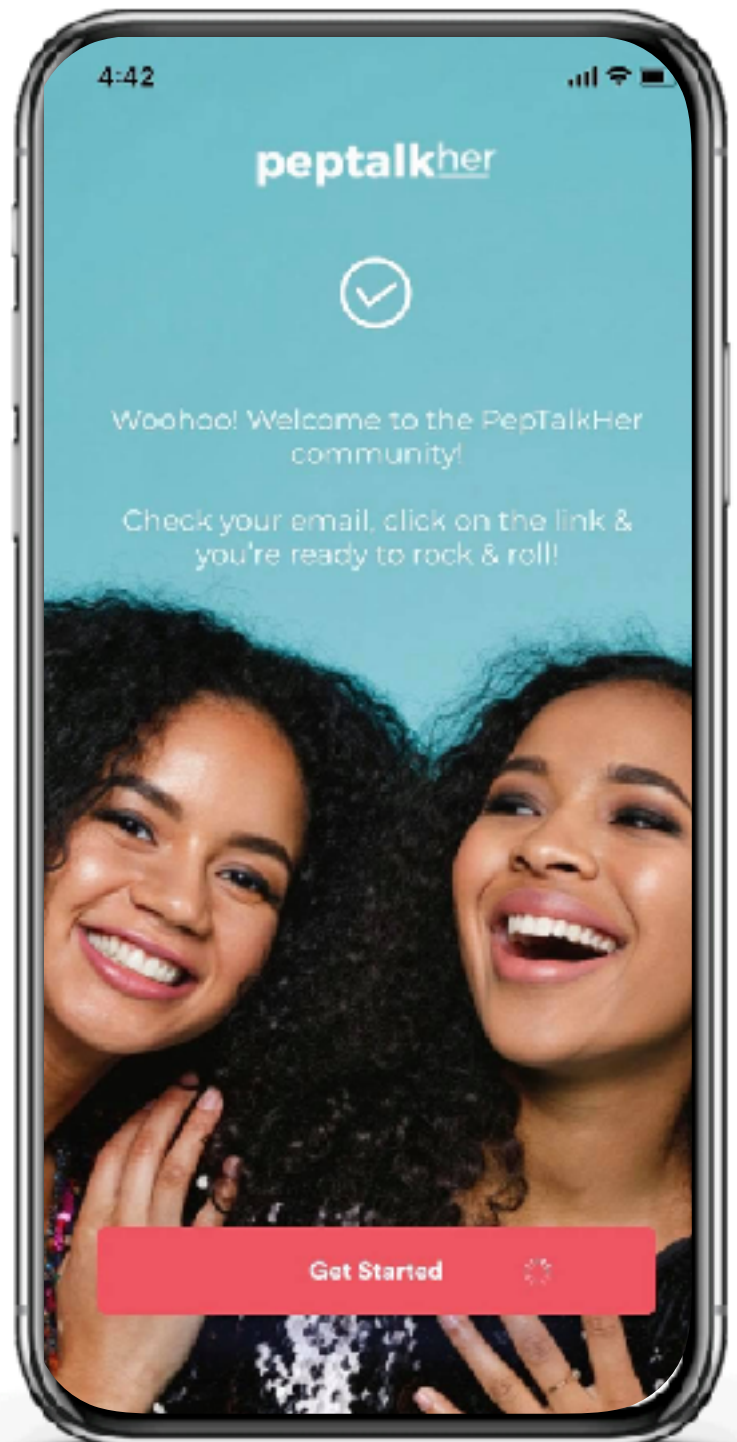
The PepTalkHer App was build to help support our community. It helps:

- **Track Your Wins**
- **Build Confidence**
- **Know Your Worth**
- **Get that Raise!**

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Meet the PepTalkHer Team

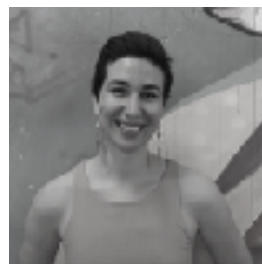
We offer workshops, facilitation, keynote speeches & panel curation. Our team's spoken at conferences in the USA, Asia & Europe & facilitated workshops for hundreds of corporate client including Revlon, SXSW & Contently.

We're on a mission to close the gender pay gap & help people supercharge their success.

Boring corporate training is a thing of the past with PepTalkHer! We're passionate, high energy & engaging.

We are all diversity & inclusion experts. Among us, we've a broad range of experience - from psychologists to professors to former Wall Street bankers to foreign correspondents. We've experience working for Citi Bank, Yahoo, Wikipedia, BBC World & the Global Fund for Women, to name a few.

Our trainers all deliver our bespoke training modules targeted specifically for your business. We have trainers who specialize in racial, LGBTQI & Transgender awareness. Please don't hesitate to ask if you're looking for a bespoke training program.



You're Awesome!

We hope you found this document helpful and we wish you the utmost success in creating your company's Employee Resource Group.

Our team has assembled this workbook from our expertise, extensive research, and feedback from our clients & colleagues at companies such as:



THINX



Contently



If we can do anything to help please don't hesitate to reach out: hello@peptalkher.com

Follow our journey on Instagram [@PepTalkHer](https://www.instagram.com/PepTalkHer).

Our Founder Meggie Palmer is on [LinkedIn](#). And check out our PepTalkHer App on the [Apple](#) & [Android App Store](#) so you can track your career wins!