



EXECUTIVE SUMMARY

July 25, 2019



SYMPOSIUM 2019

This is a high-level summary of the discussions and main takeaways from the ERG Leadership Alliance Symposium, July 25, 2019. This document can be freely shared and accompanies the attendee-only Taskforce Table notes.

Alyssa Dver

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The inaugural ERG Leadership Symposium was held July 25, 2019 attracting 80 inspiring diversity and inclusion (D&I) and Employee Resource Group (ERG) leaders.



Companies participating were:

American Confidence Institute
Artemis Financial Advisors
Becton, Dickinson & Company
Boston Mayor's Office of Diversity
Boston University
Bright Lights Imagery
Brown Rudnick LLP
Cengage
Communications, Ink
Con Edison
Cox Business
Crowell & Moring LLP
CVS Health
Dell
Diversity Best Practices
Diverst
EverQuote

FactSet
Federal Reserve Bank of NY
Fidelity Investments
Gilbane
Harvard Pilgrim Health Care
Harvard School of Design
Harvard University
Hasbro
Homesite Insurance
IGT
Innovation Women
Inter-American Development Bank
Iron Mountain
League of Allies
Lubien-Feinleib Intelligent Consulting
Mercer
New England Business Association

Panera Bread
PTC
Rally Health, Inc.
Schneider Electric
Social Impact Strategies
Staples
State Street
Suffolk University
The TJX Companies
Torchlight
TripAdvisor
US Tennis Association
Wellington Management Company
wiseHer
Worcester Polytechnic Institute (WPI)
Women's Lunch Place
Yale University





Key Takeaways

ERGs have been around for 30+ years but now more critical than ever for attracting and retaining diverse talent. They are reemerging as a necessary, expected perk and voice for employees yearning for a deeper sense of belonging by accessing professional development, mentorship & valuable connections. ERGs also offer a safe place to try new things, learn to lead, and contribute innovative ideas.



1. The names of the groups vary reflecting the business and cultural fit within an organization. Such as Business Resource Groups (BRGs), Affinity Groups, Interest Groups, etc. Some define these to be along gender, sexuality, race, age and other demographic lines. Some organizations extend the definition to include hobbies and social clubs designed simply for employees to engaged with other like-minded enthusiasts. These definitions impact budgeting and overall ERG sponsorship decisions so they need to be considered carefully.
2. Allyship was top of mind topic. Some attendees were adamant that for any segregated groups to be successful, they need outsider support. Others argued that allyship deters safe, comfortable opportunity which ERGs are designed to do. ERGs, overall, invite similar debates whether sanctioned minority groupings help or hurt overall culture and employee integration. Regardless of the perspective, there is proof that ERGs help employees and employers, but they clearly need to be guided, funded, and lead within the contexts of the surrounding culture.
3. Managing an ERG, as well as overseeing multiple ones, requires business savviness to measure and monitor success using data as well as solid business sense. Using meaningful metrics and presenting them to ERG members, existing and potential sponsors, as well as other ERG leaders can help rally the people and resources desired. With most ERG leaders being part-time volunteers with 'real' day job responsibilities, ERG work is taxing though can be very rewarding in terms of experience and opening new doors within and outside of the organization.
4. To fully gain and sustain momentum, ERGs most of all need: 1) active executive sponsorship with people genuinely interested and engaged, not 'voluntold'; 2) ERG leaders should be recognized and encouraged in their regular job performance reviews; 3) ERGs should be promoted in new employee onboarding, through HR systems and communications; and 4) ERGs require structure, policies and governance to ensure smooth operations as well as leadership transitions.

As the following Executive Summary will give more details on each session, the attendees clearly found the Symposium helpful, and they desire and annual one as well as more frequent local ones to continue these important conversations year-round. Online support was requested and being sought out to give on-demand information and resources to the diversity champions working to develop ERGs within and between multiple organizations.



Session 1: Opening Remarks & Introductions



Alyssa Dver, Chair for the ERG Leadership Alliance, served as the Symposium host and welcomed everyone to the day. Her message reinforced the need ERGs to enable more engaged, inspired and confident employees, as well as attracting highly desired candidates. Moreover, Alyssa cited examples of how organizations benefit from the product innovation, market identification, and customer support that ERGs have proven to profitably enable.

Alyssa also discussed the challenges still present in obtaining reasonable budget and overall executive support to develop healthy ERGs. She rallied the attendees to recognize their pioneering work as hard, often thankless and sometimes frustrating. Yet, she was optimistic in reminding the attendees that they were gathered there for the exciting opportunity to “make history together by practicing what we preach and using diversity to even move ERGs forward together.”

women’s lunch place

ERG Leadership Alliance selected The Women’s Lunch Place as this year’s non-profit partner to give 5% of the Symposium profits. Lorraine Levine gave a quick sense of the organization’s perfectly aligned mission which welcomes all self-identifying women with open arms and unconditional support.



Attendees were then invited to gather by birth months to do smaller group introductions - sharing not just what they do at work and the ERGs they support, but also some personal tidbits to connect personally with one another.





Session 2: State Street Case Study Interview

Alyssa then invited Stefanie Mansfield, Managing Director, Global Relationship Manager in State Street's Global Clients Division, to talk about her experience as co-chair for the Professional Women's Network (PWN). Stefanie was been involved for many years as a member and then on several committees prior to becoming co-chair. PWN has won many awards and been recognized as one of the most successful ERGs not just within State Street, but overall in the country. With over 4000 global members, PWN was one of the original 3 State Street ERGs that over the past decade, has flourished and inspired now dozens of other ERGs at State Street around the world.



Some key aspects of the PWN's journey:

- Gaining high level executive sponsorship and involving them in planning, events, and debriefs
- Having clear structure and process for leadership election and succession planning.
- Willingness to try but measure new programming to find and include what works well.
- Success has been measured in a variety of metrics regular ERG event attendance, member activity, job and scholarship obtainment, plus the Alliance itself resulted largely from the PWN hiring Alyssa as their MA Conference for Women's breakfast keynote 3 years ago! This spurred Alyssa's continued work and awareness of overall ERG needs so that together with Stefanie, they conceived the idea for the Alliance!

Session 3: Panel on Getting ERGs Funded

Ron Taylor, Diversity Chief at the Federal Reserve Bank of NY, moderated an insightful panel that included:

- **Erin Reardon DeFoyd** led the creation of Mercer's very successful 'When Women Thrive' group
- **Peter King** facilitates critical conversations and decisions between Con Edison executives and ERG leaders
- **Joyya Smith** represented academic ERGs as Vice President for Diversity, Access, and Inclusion at Suffolk University.



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The panel discussed how they each approach budget requests noting the differences in their organizational types, cultures, ERG histories and future diversity objectives. Budgets ranged from \$250/group/event to around \$100k per ERG. While there seemed to be no single answer how to obtain and what is ideal funding, they all agreed there is never enough money to do the work they'd like to do but some things can be done with even a little funding and creativity. One of the big questions discussed was how budget is split among an organization's multiple ERGs – evenly, per capita, or using an activity-sized metric to reward those ERGs that can propose and demonstrate some type of ROI. Again, there was no clear best practice and confirmation that no one answer will ever fit all organizations.

Session 4: Taskforce Tables



Attendees then broke into groups of 8 or fewer attendees with 1 or 2 mentors to focus together on a pre-selected topic of choice:

- ▶ Setting & managing the group's charter, by-laws & procedures
- ▶ Monitoring metrics for group's success
- ▶ Group policies for working w/ outside vendors & sponsors
- ▶ Attracting and sustaining active leadership
- ▶ Finding and leveraging executive sponsorship
- ▶ Attracting members
- ▶ Engaging members
- ▶ Creating allyship
- ▶ Selecting Programming
- ▶ Monitoring metrics for group success

Each group worked over lunch to discuss a set of provided prompts to jointly figure out what and how to tackle the issues at their respective organizations. Groups then presented back to the entire room their findings and recommendations. ***A specific set of proprietary notes was captured and provided to attendees with the Taskforce Table debriefings.***



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Session 5: What Next?

The final formal session was an open floor discussion about what the attendees wanted from the Alliance going forward. Various formats and frequency options were discussed for events, other types of programming, and access to helpful resources. The Board of Advisors is reviewing all such ideas and will soon be implementing a plan to carry the Alliance forward in service to ERG leaders.

Alliance Executive Consultant, Erin Lubien, closed the day confirming that everyone was leaving with more confidence to develop their respective ERGs knowing they are part of an important movement with fellow diversity champions to support them.

The day wrapped up with snacks and networking among attendees.



For the complete photo library from event, go to:

<https://brightlightsimagery.pixieset.com/ergleadershipconference2019/>

Other resources offered during the Symposium:

Forte's Men as Allies Resources

<http://www.fortefoundation.org/site/PageServer?pagename=allies>

Center for Talent Innovation Research

<https://www.talentinnovation.org/Research-and-Insights/>

Center for Talent Innovation Key Findings on the Sponsorship Dividend

<https://www.talentinnovation.org/Research-and-Insights/>



About the ERG Leadership Alliance

The ERG Leadership Alliance (ELA) was formed to empower Employee Resource/Affinity Group Leaders by sharing best practices across companies. With its inaugural Symposium July 25, 2019 in Boston, 80 founding members helped kick off and define the Alliance to best support ERG leaders' needs. Essentially the ERG of ERGs, the Alliance will continue to enable D&I and ERG leaders from different organizations to collaborate in person and online.

Alliance Chair

Alyssa Dver: *American Confidence Institute; Author; Wharton Innovation Center, MIT Trust Center, Stevie's Award Judge for Best Employer and Women in Business; Westborough Fine Arts Education Association*

Executive Consultant

Erin Lubien: *Lubien-Feinleib Intelligent Consulting; K!ck*ss Women; Belmont Economic Development; Girl Scouts of Eastern MA*

Symposium Board of Advisors:

- **Bobbie Carlton:** *Innovation Women, Innovation Nights; CarltonPR*
- **Jennifer Charles:** *Brown Rudnick LLP; Women of Power Hour Series*
- **Christine Jauregui:** *Social Impact Strategies; Prospanica Boston; Amplify Latinx,; Affinity Leadership Consortium; MA Women's Political Caucus - South Shore*
- **Lawler Kang:** *League of Allies; Author; Rue La La; Gender Lens Investing Primer*
- **Stefanie Mansfield:** *State Street Corporation; Professional Women's Network; Ellevate; Everwise*
- **Alison Martin-Books:** *Diverse Talent Strategies; Author; Engage Mentoring; Pass the Torch Foundation*
- **Kathleen McQuiggan:** *Artemis Financial Advisors LLC; Pax Ellevate; Forte; Firmwide Women's Network, Goldman Sachs*
- **Kathryn Rose:** *wiseHer; CompTIA Advancing Women in Tech; Access Earth; Harvard Business School; Southborough Educational Foundation*

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