# **Employee Resource Groups**

# **Roadmap and Tools**

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## Introduction:

Diversity, Equity, and inclusion are critical to the Commonwealth’s ability to innovate, grow, and thrive in this ever-changing, fast-paced environment.

Employee Resource Groups (ERGs) are vital to the Commonwealth’s commitment to driving change. They help to create a welcoming workplace culture where individuals of all backgrounds feel empowered to bring their whole selves to work.

ERGs enable us to leverage the exceptional resources of the Commonwealth’s employees and advance our shared vision and mission. A well-informed and vibrant group of ERGs will aid in talent acquisition, serve as a source to bolster retention, and contribute to the development of employees.

ERGs can further support efforts to attract and retain top talent, promote leadership and development at all levels, and establish internal support systems for employees across the enterprise.

Best practices suggest that when Employee Resource Groups (ERGs) are established, employees become more engaged in identifying ways to leverage diversity and promote inclusion.

Through this document, the Human Resources Division Office of Diversity and Equal Opportunity aims to provide a roadmap for developing, implementing, and sustaining Employee Resource Groups (ERGs).

## Overview:

### What are ERGs – Employee Resource Groups?

The first employee resource groups were “Workplace Affinity Groups,” created in response to the racial strife of the 1960s. Joseph Wilson, the former CEO of Xerox, developed the concept following the 1964 race riots in Rochester, NY. Wilson and his black employees designed and launched the National Black Employees Caucus in 1970 to address racial tension and workplace discrimination.

ERGs are employee-led, self-directed, and voluntary groups that share concerns of common interest around various dimensions of diversity, such as race, gender, national origin, sexual orientation, or other protected characteristics. Today’s ERGs have evolved to include caregiver groups, environmental groups, bilingual employees, working parents, and other groups with a shared focus. These ERGs offer opportunities to network internally, attract a diverse employee base, provide the inclusion of ideas and solutions, and create opportunities for mentoring and career development.

Over the past 10 to 15 years, employee resource groups have consistently demonstrated their value as business and organizational assets, contributing to recruitment and retention, marketing, brand enhancement, supplier diversity, training, and employee development. Some organizations view their Employee Resource Groups (ERGs) as instrumental to their success as their workforces become increasingly more diverse.

There are several vital components to launching a successful Employee Resource Group. They include the Guiding Principles, Charter, Governance Structure, and Key Performance Indicators (KPIs), which serve as measures of success.

## Purpose of ERGs

The purpose of an ERG is to foster a more inclusive, supportive, and diverse workplace by providing employees with a platform to connect, share experiences, and drive positive change within the organization. Share knowledge, utilize experiences, and leverage influence to foster cultural awareness and engage coworkers.

## Benefits of ERG:

### Employer

* Inclusive workplace aligned with the mission, vision, values, and goals of the Secretary/Agency
* Increased Employee Engagement
* Development of future leaders
* Succession planning for future leadership needs
* Expansion of recruitment pipelines
* Enhancing the Commonwealth’s Brand

### Employees

* Demonstrate initiative, leadership and teamwork
* Gain visibility among leadership and decision-makers.
* Connect with colleagues across the Secretariat/Agency and build meaningful relationships with people who share similar interests.
* Support recruitment and retention efforts by advocating diversity.
* Contribute ideas that shape business strategies and workplace improvements.

## ERG Guiding Principles:

* Be open to all
* ERGs must promote diversity, inclusion, and belonging
* ERGs must adhere to applicable state laws, policies, and procedures and operate within the parameters established by Executive Order 592
* ERGs must offer mutual benefit to participants and the Commonwealth
* Best Practice suggests forming your ERG on the 4 Pillars of the 4Cs Model (Culture, Career, Commerce, and Community)

## **Employee Resource Groups Do Not**:

* Engage in any activity inconsistent with the Secretariat or Agency’s mission or values or their expressed Charter.
* Exclude employees from participating in meetings or activities.
* Advocate for or take a position that could be considered exclusive.
* Engage in discriminatory conduct on any basis.
* Promote political, religious, or ideological views, agendas, or causes.
* Engage in political activities, make political or legislative endorsements, or promote candidates for public office, clarify group vs. individual (individuals can pursue political activities outside of the Secretariat and Agency)
* Engage in fundraising activities, either internally or externally, without advance approval
* Make direct charitable donations.

## ERG Governance Structure:

**Establishing a robust governance structure is crucial for the successful implementation of an Employee Resource Group. Each ERG should, at a minimum, include the following key roles:**

### ERG Leadership Team

**ERG Chairperson:** The overall lead for the ERG, who oversees ERG operations, sets the strategic direction, and represents the ERG to executive leadership, is responsible for communications, activities, and the frequency of meetings. Best practice suggests that Resource Groups meet at least quarterly. However, the ERG determines the frequency of its meetings.

**ERG Co-chairperson:** Supports the chairperson and steps in when necessary, helping to coordinate the various initiatives.

**ERG Treasurer:** The ERG Treasurer is responsible for managing the annual budget and processing funding requests. The ERG treasurer is responsible for periodically accounting for the ERG expenses to the Secretariat or Agency Leadership.

**ERG Secretary:** Responsible for maintaining documents, meeting minutes, and records, as well as ensuring effective communication.

**ERG Executive Sponsor:** A Senior leader who advocates for the ERG, providing strategic guidance and assisting in securing resources. Serves as a liaison between ERG leadership and executive leadership, including senior leaders, Diversity Directors, and HR. The sponsor should mentor and guide ERG leaders in their efforts to create a dynamic and inclusive workplace.

### ERG Membership

**ERG Members:**Open to all employees interested in supporting the ERG’s mission. Participate in events, initiatives, and volunteer opportunities.

Based on the ERG goals and activities, in addition to the ERG Leadership Team, some ERGs also establish various committee leads, such as:

* Events & Programming Lead: Organizes events, workshops, and networking opportunities.
* Membership & Engagement Lead: Recruits and retains members, ensures participation.
* Marketing & Communications Lead: Manages internal/external communication, newsletters, and social media.
* Partnerships & Sponsorships Lead: Builds relationships with other ERGs and community organizations.
* Professional Development Lead: Oversees mentorship programs, career growth initiatives, and skill-building opportunities. This structure strikes a balance between leadership, accountability, and inclusivity, ensuring the ERG can effectively drive change and support its members.

## **ERG Key Performance Indicators**:

Specific Key Performance Indicators (KPIs) should be established for each ERG to measure the effectiveness of the group. Establishing such KPI will aid the ERG is staying on focused on their mission as outlined in the charter. Examples of KPI may include:

* Growth in the number of members year over year (Y/Y)
* Number of initiatives held annually
* Measurable impact to organizational strategies
* Measurable shifts in the culture of the Secretariat or Agency

## Dissolution of an ERG:

An Employee Resource Groups may need to be dissolved under certain circumstances to ensure that resources are effectively allocated and that the group remains aligned with the Secretariat or Agency’s goals. Some examples are:

1. Lack of member participation – declining membership or low event turnout over a period of time.
2. ERG in violation of its stated charter. The ERG engages in activities that contradict the policies ethics or values of Secretariat/Agency.
3. The ERG has successfully fulfilled its mission, and there is no longer a need for it.
4. Misalignment with organization or DEI goals.
5. The organization is restructuring or reorganizing.

***NOTE:*** Dissolving an ERG should be a last resort, and whenever possible the organization should explore alternatives to dissolution. However, if dissolution is a necessary next step. Please use the template in the appendix section.

## Roadmap:

### Phase 1: Planning and Development

* Define the purpose and Goals
* Secure Executive Sponsorship
* Identify Target Audience
* Develop Business Case

### Phase 2: Establishing the ERG

* + Recruit Members and Leaders
	+ Create Governance and Structure
	+ Secure Resources and Funding
	+ Develop the ERG Charter

### Phase 3: Launch and Engagement

* Announce the ERG
* Plan Initial Activities and Events
* Encourage Participation and Engagement

### Phase 4: Sustainment and Growth

* Measure Impact and Gather Feedback
* Expand Partnership and Collaborations
* Ensure Leadership Continuity
* Report Progress to Leadership
* Evolve and adapt

***\* Details on the various phases are located in the appendix***

This Employee Resource Roadmap is designed to support you at every step on this journey. Whether you are just beginning your process of developing an ERG or you are well into your journey, these resources are here to help you succeed. We encourage you to take full advantage of the tools. Working together, we can create a thriving, inclusive and productive workplace where everyone has the opportunity to grow and contribute.

General questions about forming an ERG should be directed to Sandra E. Borders, Director of the Office of Diversity and Equal Opportunity, at Sandra.e.borders@mass.gov.

# **APPENDIX**

The items contained in this Appendix are intended to support agency employees in the establishment of an Employee Resource Group. Sample items included may be completed by inserting your secretariat/agency specific information where indicated by sample text in brackets. Feel free to print and utilize these materials as needed for your agency’s efforts.

## Roadmap Phases in Detail:

### Phase 1: Planning and Strategy Development

1. **Define the Purpose and Goals**

• Identify the mission and objectives of the ERG (e.g., diversity, professional development, social impact).

• Align the goals with Secretariat/Agency values and organizational objectives.

• Determine the key benefits for employees and the organization.

B. **Secure Executive Sponsorship**

• Gain support from leadership to ensure visibility and funding.

• Identify an executive sponsor who can advocate for the group at higher levels.

C. **Identify the Target Audience**

• Determine who the ERG will serve (e.g., women, LGBTQIA+, veterans, persons with disabilities, young professionals, etc.).

• Ensure inclusivity and open participation for allies.

D. **Develop a Business Case**

• Highlight the impact on employee engagement, retention, and organizational culture.

• Include data, case studies, and potential Return on Investment (ROI). How will the ERG assist the secretariat/agency in achieving its business objectives?

### Phase 2: Establishing the ERG

1. **Recruit Members and Leaders**

• Identify passionate employees to form a leadership team.

• Ensure diversity in leadership and clear role assignments.

• Define a membership structure (e.g., open enrollment, nomination-based).

B. **Create Governance and Structure**

• Establish bylaws, leadership roles, and decision-making processes.

• Set meeting frequency and communication methods.

• Outline expectations for participation.

C. **Secure Resources and Funding**

• Work with leadership to secure a budget.

• Collaborate with leadership, HR, and facilities to identify and utilize available resources, including meeting spaces, technology, and marketing support.

D. **Develop an ERG Charter**

• Document the mission, goals, leadership structure, and operational guidelines.

• Define how the ERG will measure success.

### Phase 3: Launch and Engagement

A. **Announce the ERG**

• Utilize Secretariat/Agency communication channels, including emails, intranet EE portals, All-Staff Meetings, and weekly newspapers.

• Host a launch event to introduce the ERG’s mission and leadership.

• Offer a straightforward process for employees to join.

1. **Plan Initial Activities and Events**

• Organize networking events, workshops, and mentorship programs.

• Collaborate with Diversity Directors, HR, and Workforce Development for professional development initiatives.

• Ensure activities align with the ERG's mission.

1. **Encourage Participation and Engagement**

• Foster an inclusive environment where all employees feel welcome.

• Leverage internal communication tools, including employee newsletters, secretariat/agency intranets, and social media platforms.

• Recognize and celebrate member contributions.

### Phase 4: Sustainment and Growth

A. **Measure Impact and Gather Feedback**

• Track participation rates, event feedback, and engagement levels.

• Conduct member surveys to assess effectiveness.

• Adjust strategies based on feedback.

B. **Expand Partnerships and Collaborations**

• Collaborate with other Employee Resource Groups (ERGs) to amplify impact.

• Partner with external organizations to host speaker events, secure sponsorships, or engage in community service.

**C. Ensure Leadership Continuity**

• Develop succession planning for ERG leadership roles.

• Offer leadership training and mentorship to develop future leaders.

D. **Report on Progress to Leadership**

• Provide regular updates to Executive Sponsors and leadership members.

• Showcase achievements, challenges, and future plans.

1. **Evolve and Adapt**

• Stay responsive to employee needs and organizational changes.

• Innovate with new programs and initiatives.

• Celebrate milestones and successes.

## Employee Resource Group Charter Application

*Below are questions to be answered by the individual Employee Resource Group to accompany its charter when submitting it* *to the* ***Agency Diversity Officer.******All Employee Resource Groups must apply for review and approval to be recognized as Employee Resource Groups formally.*** *Please submit your questions or complete an application with the appropriate office.*

Name of Employee Resource Group:

Name of Agency/Secretariat Employee Organizer:

Employee Organizer Title:

Office:

Work Phone:

Email:

Employee Organizer Signature:

Date:

What is the ERG’s purpose? (500 words or less)

What is your Employee Resource Group’s Mission Statement? (*This can be the same as in your ERG Charter.)*

Please provide three examples of how your group’s mission and purpose serve the Agency’s mission.

1.

2.

3.

Please describe your leadership structure, including how they are elected, their terms, and communication with the members?

Please provide names and signatures of **at least ten agency employees** who indicate they will join your Employee Resource Group. Attach a list of any additional employees

1.

2.

3

4.

5.

6.

7.

8.

9.

10.

## **Employee Resource Group Charter Application Approval**

The application for [Insert ERG Name] Employee Resource Group has been reviewed by the [Insert Diversity Officer], Agency Diversity Officer, and forwarded to the [Insert Secretariat Diversity Officer] Secretariat Diversity Director with the following recommendation:

Approve: [Yes or No] Disapprove: [Yes or No]

Comments:

[Add your signature] [Add date]

Signature Date:

## ERG Quarterly Report Template

Subject: [ERG Name] Quarterly Update

Dear [Executive Sponsor],

Here’s a quick update on our ERG’s progress this quarter:

📊 Membership Growth: [Number] new members joined

📅 Events Hosted: [Event Name] had [Insert attendance] participants

📈 Impact Metrics: [Survey feedback, retention stats]

Next Steps:

• [Upcoming events]

• [New initiatives]

Looking forward to your feedback!

Best,

[Your Name]

## **ERG Leadership Succession Template**

**Title: ERG Leadership Transition Plan**

1. **Current Leadership Review**

List current leaders and roles

2. **Succession Strategy**

Define term limits for roles

Create mentorship opportunities for future leaders

3. **Selection Process**

Nominations process

Voting structure

4. **Transition Timeline**

Set key dates for leadership handover

## **Sample ERG Charter/Bylaws**

### EMPLOYEE RESOURCE GROUP CHARTER/BYLAWS TEMPLATE

### PREAMBLE

Consistent with Executive Order 592: Advancing Workforce Diversity, Inclusion, Equal Opportunity, Non-discrimination, and Affirmative Action and the Commonwealth’s vision to be a model employer by leveraging diversity and fostering inclusion, we are creating a culture which values the contributions of all employees and provides equal opportunity for professional development and career advancement.

### ARTICLE I: NAME

**1.1 NAME**

This organization shall be known as the [**Insert name of Employee Resource Group**].

### ARTICLE II: MISSION

**2.1 MISSION**

The Mission of [Insert the name of the ERG]is to be a strategic partnerwith [Insert the Secretariat/Agency] to promote a culture of diversity and inclusion through continual learning. The [Insert name of ERG] will advance the understanding and inclusion of employees with a common background, set of interests and/or goals. The vision, mission, objectives, policies, and activities of [Insert the name of the ERG]are fully aligned with those of [Insert the Secretariat/Agency] mission, goals, and policies.

The [Insert the name of the ERG] will be a valuable mechanism to: [Insert the ERG’s mission statement, reflecting the purpose of the group, the work it intends to achieve, and/or the principles or beliefs that guide the ERG’s work.]**The statement should be limited to a paragraph*.***

An example of language that could be added here:

1. Build a culture that fosters innovation
2. Offer employees access to leadership opportunities
3. Establish programs and activities aligned with the mission of Secretariat/Agency
4. Provide employees opportunities to develop and grow, and for managers to access innovative concepts and unique solutions to challenges faced by [Insert the Secretariat/Agency]

### ARTICLE III: MEMBERSHIP

**3.1 ELIGIBILITY**

Membership in the ERG is available to all [Insert the Secretariat/Agency] employees. The ERG shall record the names and locations of all members. All members are eligible to chair committees, become candidates for elected office, and vote in ERG elections.

### ARTICLE IV: STRUCTURE AND OPERATIONS

**4.1: LEADERSHIP, ROLES & RESPONSIBILITIES**

ERG Leadership Team

ERG Chairperson: The overall lead for the ERG, who oversees ERG operations, sets the strategic direction, and represents the ERG to the executive leadership, is responsible for communications, activities, and the frequency of meetings. Best practice suggests that Resource Groups meet at least quarterly. However, the ERG determines the frequency of its meetings.

ERG Co-chairperson: Supports the chairperson and steps in when necessary, helping to coordinate the various initiatives.

ERG Treasurer: The ERG Treasurer is responsible for managing the annual budget and processing funding requests. The ERG treasurer is responsible for periodically accounting for the ERG expenses to the Secretariat or Agency Leadership.

ERG Secretary: Responsible for documents, meeting minutes, records, and ensuring effective communication.

ERG Executive Sponsor: A Senior leader who advocates for the ERG, providing strategic guidance and assisting in securing resources. Serves as a liaison between ERG leadership and Executive leadership, comprising senior leaders, Diversity Directors, and HR. The sponsor should mentor and guide ERG leaders in their efforts to create a dynamic and inclusive workplace.

The Group shall have an Employee Leader. This individual shall:

1. Work closely with the ERG Sponsor.

2. Officially represent the ERG within *insert Secretariat/Agency Name*.

**4.2: TERMS OF OFFICE**

There are no limitations on the number of terms of office an individual may hold. However, most ERGs adhere to a two-year term.

**4.3: ADDITIONAL OFFICERS**

The employee lead may appoint additional officers as necessary.

**4.4: NOMINATIONS AND ELECTION OF THE EMPLOYEEE LEADERS**

Section 1: Election Meeting

Elections shall be held. In the case of a resignation of the employee leader from office, a special election meeting may be held to fill the post until the end of the current term.

### ARTICLE V: NOTICE OF MEETINGS

**5.1 MEMBERSHIP MEETINGS**

There shall be regular meetings of the ERG, [Insert the cadence] on a date and place to be designated by the ERG Chair and approved by the Executive Sponsor. This meeting shall be held at a specified location and announced to members of the ERG. The ERG Secretary [Insert name] shall send a notice of each regular meeting to each member of the ERG.

## Sample ERG Workplan

Developing a structured work plan is vital for the success of an Employee Resource Group. The plan should detail the ERG's goals, activities, and metrics to guide its initiatives. Regularly assessing and adapting strategies will ensure the ERG remains responsive to the changing needs of its members and the Secretariat or Agency. A sample work plan has been included for your convenience.

**DEI Focus:** Recruitment and Retention
**4Cs Pillar:** Career

**Goal:** Collaborate with the agency’s HR team to broaden recruitment areas, including underrepresented groups.

**Activities:**

* Share job postings with personal networks and professional organizations
* Research and develop a library of professional organizations with members of underrepresented groups
* Promote development opportunities amongst ERG members
* Encourage independent training for skills development via ***MassAchieve***

**Measures:**

1. Increase the talent pipeline of underrepresented groups
2. Increase in the number of hires from underrepresented groups
3. Number of skills development trainings ERG members completed

**DEI Focus:** ERG Cross-Secretariat collaborations
**4Cs Pillar:** Community

**Goal:** Build ERG capacity for cross-secretariat collaborations

**Activities:**

* Meet with 1 -2 ERG leaders outside of your secretariat to brainstorm possible cross-secretariat collaborations
* Present cross-secretariat collaboration to ERG Executive Sponsor and gain buy-in
* Plan the cross-secretariat collaboration initiative

**Measure:**

1. Successful execution of cross-secretariat ERG collaborative event

## Sample ERG Plan - Dissolution Notice

Employee Resource Group (ERG) Dissolution Notice

Date: [Insert Date]

To: [ERG Members, Executive Sponsor, Diversity Director/HR]

From: [ERG Leadership Team]

Subject: Dissolution of [ERG Name]

Dear [ERG Name] Members,

After careful consideration, we regret to inform you that the [ERG Name] will be officially dissolved as of [Effective Date]. This decision was not made lightly and is based on the following factors:

### Reason(s) for Dissolution:

[Insert reasons for dissolution which may include any of the following]

Lack of member participation- declining membership and engagement over time

ERG in violation of its stated charter. The ERG engages in activities that contradict the policies, ethics or values of Secretariat/Agency

ERG successfully fulfilled its mission, and there is no longer a need for it

Misalignment with organization or DEI goals

Organization is restricting or reorganizing

Customize based on specific reasons

We want to acknowledge and thank each of you for your dedication, participation, and contributions. Over the years, [ERG Name] has made a meaningful impact by [highlight key accomplishments, such as events, initiatives, mentorship programs, etc.].

### Next Steps:

• Transition Plan: [Insert details on merging with another ERG, resources available for members, or other support options]

• Final Meeting/Event: [Date and details of any closing event or discussion]

• Resources Available: [Any alternative employee programs, HR contacts, or DEI initiatives members can engage with]

• Recognition & Appreciation: [Acknowledgment of ERG leaders and members]

We encourage you to continue championing the values of [ERG Name] and engaging in other diversity, equity, and inclusion efforts within the company. If you have any questions or would like to discuss further, please feel free to reach out to [Contact Person] at [Email].

Thank you again for being a part of [ERG Name] and for your ongoing commitment to fostering an inclusive workplace.

Best regards,

[ERG Leadership Team Names]

[Executive Sponsor (if applicable)]

[Secretariat/Agency Name]