How to Roll out Employee Resource Groups at Your Company

Lattice

Diversity, equity, inclusion and belonging (DEIB) is a top priority for more than 60% of HR leaders, according to our **2021 report on the State of People Strategy.**

However, many companies are struggling to move from great intentions to real change. A **research study by Eagle Hill Consulting** found that, while the majority of employees feel they are having "productive conversations" about bias in the workplace, there is still a worrying gap between what organisations say they're going to do and what employees actually experience:

- 22% of the employees responding to the survey were unable to point to a single person at their organisation who demonstrated the importance of DEIB through their actions.

- Only 31% of employees felt their leaders showed that they truly valued DEIB.

> ## Employee Resource Groups (ERGs) can be a great way to close the gap between intention and action.

ERGs are exactly what they sound like — groups of employees who come together to provide support and resources to their colleagues from historically marginalised populations. **ERGs have a proven track record** of delivering transformative results, leading to higher retention rates, a more informed workforce, greater workplace inclusivity, and a more appealing employer brand for new candidates.

If you're interested in implementing ERGs in your organisation, this workbook will help you get started. We'll cover:

- What DEIB really means, and why it matters
- How ERGs work, and how they can impact your company
- Evaluating which ERGs your organisation needs
- Planning your ERG for better results
- Evaluating and improving your ERGs for long-term success.

Section 1: A Quick Refresher on DEIB

There are many opportunities to infuse DEIB throughout your organisational culture and infrastructure. In fact, it's crucial to make sure you're investing in DEIB at every step of the employee lifecycle — from the moment they apply to the moment they leave your company for the next chapter in their careers.

Defining key DEIB terms.

Diversity

Workplace diversity refers to the level of variation in different groups of people represented in a given workforce. A diverse workforce will include employees with a wide range of characteristics, from race, to age, to gender, to sexual orientation, to economic background.

An example of diversity in action: The company's workforce reflects similar levels of diversity to their environment — at each level in the hierarchy. For instance, 50% of managers are women.

Equity

Equity is the act of reducing the differences in opportunities for various groups of people, to create a fairer reality. If equality means that all of us have the same opportunities, then equity acknowledges that we're not all starting from the same place, and so we need to take steps to create a more level playing field to drive more equitable outcomes.

An example of equity in action: Performance reviews are systematically evaluated to check for conscious or unconscious manager bias against specific groups, and ensure that promotion opportunities arise for under-represented groups as often as majority groups.

Inclusion

Inclusion is the act of creating an environment where every employee feels comfortable and safe sharing their views and opinions. To quote Vernā Myers, "Diversity is being invited to the party. Inclusion is being asked to dance."

An example of inclusion in action: Meeting guidelines are set and enforced, to make sure that everyone is invited to speak, and that diverse voices are always heard and respected.

Belonging

Belonging is the feeling of being included and welcomed at work. If inclusion is about how we interact, then belonging is about how we feel emotionally when at work. In particular, do we feel that our workplace aligns with our values, that we "fit in", and that we have strong relationships with our colleagues and managers.

An example of belonging in action: Employee surveys reveal that employees feel comfortable showing up as their whole selves at work.

Why DEIB matters to your organisation.

DEIB isn't just the right thing to do — although to be honest, that seems like a good enough reason to us!

It's also the smart thing to do. Businesses with a strong commitment to DEIB are **more innovative, more likely to retain their employees, more profitable,** and generally **better places to work.**

But DEIB is not about checking boxes. It's about ensuring all employees have psychological safety, equitable opportunities to grow, and access to resources that enrich and affirm their experiences.

If you want to create the kind of workplace that allows your employees to thrive, a proactive, comprehensive DEIB programme is fundamental. ERGs are an extremely effective component of that process.

Section 2: Getting Familiar with Employee Resource Groups

What are employee resource groups?

Employee resource groups (ERGs) have been around since the 1970s. They are workplace communities that foster belonging among shared identities, such as racial or gender groups that have been historically excluded. They aim to act as catalysts for professional development, offering support and a shared space to build allyship in the workplace.

Why are ERGs important for employees?

ERGs can have an outsized impact on company culture — both for the members of the ERGs themselves, and for the company as a whole. For employees who belong to historically marginalised groups, ERGs can offer:

- **Community:** ERGs offer a chance to share stories and develop a sense of fellowship with their colleagues, as well as the opportunity to air grievances in a supportive environment.

- **Networking:** Greater opportunities to connect with others from across the company or find mentors who have experienced similar biases and challenges at work.

- **Development:** With increased support from like-minded people, many employees feel greater confidence to take on bigger challenges at work, or reach for personal stretch goals.

- **Advocacy:** ERGs can work together to address unfair or outdated company policies, or identify and take on wider socio-political challenges in the community outside the workplace.

How do ERGs benefit organisations?

It's impossible to overstate the strong positive impact that well-implemented ERGs can have on organisations. They can deliver significant results across many key HR metrics, including:

- **Attracting and retaining talent**

  Research published in **Harvard Business Review** (HBR) shows that candidates (especially younger applicants) are far more likely to apply for a role at a company with ERGs, and also more likely to stay at an organisation with ERGs.

- **Employee engagement**

  The increased sense of belonging offered by ERGs can have profound implications for employee engagement rates. According to a **survey by Qualtrics**, 91% of employees who feel they belong at work also report high levels of engagement.

- **Psychological safety and community**

  ERGs create a safe space for like-minded groups to share openly with each other. This can offer a greater sense of psychological (and physical) safety, which in turn acts as the "key to realising the promise of diversity in teams", according to **research published in HBR.**

- **Inclusion and belonging programming**

  ERGs act as a driver of cultural change within the organisation, by identifying and advocating for opportunities for greater inclusion and belonging. By coming together to discuss and prioritise the needs of previously marginalised groups, ERGs can help make your company's DEIB programming stronger and more meaningful.

Activity 1: Over to you

After reading the previous sections, why do you think your company needs ERGs?

Which employee populations at your company would most benefit
from an ERG, and why?

How do you think introducing ERGs would positively impact your organisation?

Choosing one possible ERG, write down a mission, vision, and goal for that sums up
what you'd like to achieve.

Understanding the 4C Model for ERGs.

In order to implement and measure the effectiveness of your ERG programme, you need a way of benchmarking different attributes, and understanding how your ERGs are contributing positively to employees' experiences.

The 4C model, developed by consultancy firm DRR Advisors and used by organisations across the globe, allows organisations to assess the health, impact, and effectiveness of their ERGs on four key elements: culture, career, commerce and community.

	Culture	Career	Commerce	Community
Definition	Efforts that raise cultural competency of a company by promoting inclusion, raising awareness, and dispelling myths	Initiatives designed to help the career advancement, professional development, and education of ERG members	Activities that link ERGs to business goals, corporate initiatives, and strategies	Actions that econnect an ERG to community outreach, and volunteer efforts
Example	Collaborate with other ERGs to promote intersectionality Events for Awareness Months/Days	Launch Mentoring Circles Host IDP Workshop	Promote Free Lattice Sales Program Collaborate with Recruiting for hiring events	Volunteer with nonprofit parenting group Back to School Drive for families in need

Activity 2: Write out an example of an ERG initiative that connects to each of the four Cs. Focus on an initiative that would be easy to set up in your organisation, or that already exists.

Culture	Career	Commerce	Community

Activity 3: Which metrics could you use to measure the effectiveness of each example initiative listed above?

Culture KPI	Career KPI	Commerce KPI	Community KPI

Section 3: Evaluating Your Organisation's ERG Needs

The following questions should help you to understand your organisation's current status when it comes to ERGs, and what actions you need to take to improve the reach and effectiveness of your ERGs.

Activity 4: Reflective Questionnaire

1. Do you have ERGs? How many?

2. How are your current ERGs performing (programming, attendance, admittance)?

3. What kind of feedback have you received from employees about ERGs?

4. What kind of budget are you currently allocating to your organisation's ERGs?

5. What changes or improvements do you want to make to your ERG programme?

6. How would creating (or investing further) in ERGs benefit your organisation?

Activity 5: Fill in the gaps

Were you able to answer all the questions above? If the answer is NO, then you need to schedule in some time to gather that information. Make a note of the next actions you'll take to complete your understanding of your organisation's ERG setup below.

Next actions	Due date
E.g. Find out the current budget for ERGs across the organisation.	

Section 4: Planning for New ERGs

Developing and rolling out ERGs takes a lot of planning and intentionality from HR leaders to shape a programme that's right for your company. We broke down the planning process into four segments to help you organise your ERG programme.

Activity 6: Planning Questionnaire

General

1. How many ERGs do you need?

2. What kinds of events or programming do you want ERGs to facilitate?

3. Which internal or external communication channels would be best for each ERG use?

Finances

1. How will ERGs factor into your HR budget? Will they fall under an existing DEI budget, or is this a new cost?

2. Who will need to approve the ERG budget, and how will you secure their buy-in?

3. How will expenses be approved? Will each ERG have their own budget to manage, or will you have a central budget?

4. How will ERG leaders be compensated for their work?

ERG Structure and Leadership

1. Which of the following positions do you need for each ERG? The roles marked in **bold** are the minimum you will need for the ERG to be effective.

- **Executive sponsor**
- **Co-chair 1**
- **Co-chair 2**
- Events Committee Chair
- Financial Committee Chair
- Learning & Development Committee Chair
- Member Engagement & Recruitment Committee Chair
- Marketing & Communication Committee Chair

2. How will leadership positions be determined? Select all that apply, and add notes on the guidelines for each process. (Example: To be eligible for participation in ERG Leadership Elections, members must have joined three months prior to the election period.)

- Application
- Interview
- Voting

3. What competencies should leaders learn or demonstrate? Circle the five most important competencies for your organisation.

- Strategic thinking
- Flexibility
- Problem solving
- Collaboration
- Conflict management
- Innovation
- Integrity
- Resilience
- Accountability
- Decisiveness
- Influence

4. How will leaders' performance be evaluated or celebrated? Circle all that apply.

- Performance appraisals
- Developmental reviews
- Individual Development Plans
- Employee recognition and reward programmes
- Peer recognition schemes
- Lattice Praise

5. Membership:

- How will membership be granted?

- Who will be eligible to join?

- How often is membership evaluated?

- Are there participation requirements?

Activity 7: Designing ERG Roles and Responsibilities

Using the answers from above, fill out this chart to outline the expectations, compensation, and commitments for each position:

Title	Service Commitment (years)	Weekly Commitment (hours per wk)	Comp ($ per yr)	Responsibilities
Co-chair				
Membership engagement & recruitment chair				
Finance chair				
Learning & development chair				
Events chair				
Marketing & communications chair				

Section 5: Measuring the Effectiveness of Your ERGs

Why it's essential to measure the success of your ERG.

For ERGs to make a real impact on your organisation, they should be evaluated and improved over time, just like any other initiative that your company takes seriously. Each ERG needs a clearly defined mission, as well as short-term tactical objectives to make a meaningful difference to the overall employee experience.

In real terms, this means that you should be monitoring, assessing, and optimising results — both to ensure that the ERG is as effective as possible, and to make sure that the organisation is providing the right kinds of support to make the ERGs work over the long-term.

How to measure ERG results.

You should be collecting two kinds of employee feedback about your ERGs:

1. From ERG members

2. From the rest of your employees

For both forms of feedback, we'd recommend setting up a regular survey, and then tracking results over time. You'll need to run a survey before establishing your ERGs so that you have a starting benchmark to measure your success.

What effectiveness metrics should you measure?

When it comes to ERG effectiveness, there are particular areas of impact that you should be tracking:

1. Employee engagement

Does the ERG make an impact on the overall engagement of your employees? Has it impacted the engagement levels of your employees from historically marginalised groups?

2. Diversity

How has the ERG affected the diversity of your organisation? For instance, has the make-up of your employees recommended for leadership opportunities shifted? Has your recruitment strategy become more diversity-aware?

3. Equity

Does every employee see that they have opportunities for growth and development within your organisation?

4. Inclusion

Does every employee feel comfortable sharing views and opinions with colleagues? Do more people speak up during meetings?

5. Belonging

Does every employee feel welcome at work? Does every employee feel they can be themselves in the workplace? Do employees feel that their mental and emotional wellbeing is important?

Example survey questions to ask ERG members:

On a scale from 1 to 5, how strongly do you agree with the following statements:

- This ERG is a valued part of the organisation.
- The work we do as an ERG is important and meaningful.
- The ERG has given me a stronger sense of community at work.
- The ERG has helped me to expand my professional network.
- I have found a mentor or offered mentorship through this ERG.

Example survey questions to ask all employees:

On a scale from 1 to 5, how strongly do you agree with the following statements:

- I feel empowered to make decisions at work.
- I feel like I belong at [Company Name].
- My wellbeing is important to [Company Name].
- I have access to opportunities for development and growth.
- I have a community of like-minded people at [Company Name].

For more questions to include, check out our free

Diversity and Inclusion Survey Template.

Section 6: Take Your Next Steps with an ERGs Checklist

Now that you've got the whole picture on how ERGs can fit into your DEIB programme, it's time to take action. Here's a handy checklist to get you started.

Complete this Lattice ERGs Workbook.

Secure buy-in from relevant stakeholders to establish (or overhaul) an ERG or multiple ERGs in your organisation. (Your answers to Activity 6 should help.)

Define and communicate the objectives of your ERG programme.

Create a plan for your ERGs, including a timeline, milestones, and a budget.

Working with relevant stakeholders, define a mission statement for each ERG.

Elect ERG leadership positions.

Partnering with newly elected ERG leaders, establish an initial ERG objective for each group.

Design and roll out training for ERG leaders to facilitate ERG programming.

Roll out an employee DEIB survey to establish current DEIB benchmarks.

Partnering with ERG leadership, define ERG roles, membership processes, and policies.

Communicate ERG information to employees and open ERGs up for new members.

Develop and schedule a regular employee survey to collect feedback and measure ERG success.

Using employee survey feedback, partner with ERG leaders to identify opportunities for further support from the organisation, as well as how to maximise their reach and impact.

Section 7: Further Reading and Resources

Articles:

Careers Spotlight: What Is a Chief Diversity Officer?

How Hybrid Work Affects DEIB Initiatives

How to Build a Successful Diversity, Equity, and Inclusion (DE&I) Program

How to Prioritise DEIB in a Global Organisation

How to Set Diversity and Inclusion Goals

What Is Workplace Diversity and How Can You Put It Into Practice at Your Organization?

Books:

Belonging: The Key to Transforming and Maintaining Diversity, Inclusion and Equality at Work by Kathryn Jacob, Sue Unerman, and Mark Edwards

Belonging at Work: Everyday Actions You Can Take to Cultivate an Inclusive Organization by Rhodes Perry

Come into My Office by Mai Ton

Inclusion Revolution: The Essential Guide to Dismantling Racial Inequity in the Workplace by Daisy Auger-Domínguez

Unleashing the Power of Diversity: How to Open Minds for Good by Bjørn Z. Ekelund

Free Templates:

Diversity and Inclusion Survey Template

Employee Engagement Survey Template

About Lattice

Lattice is the people success platform that enables HR leaders to develop engaged, high-performing teams. By combining continuous performance management, employee engagement, development, compensation, and growth in one solution, organizations get powerful, real-time analytics that leads to actionable insights turning managers into leaders, employees into high performers, and companies into the best places to work.
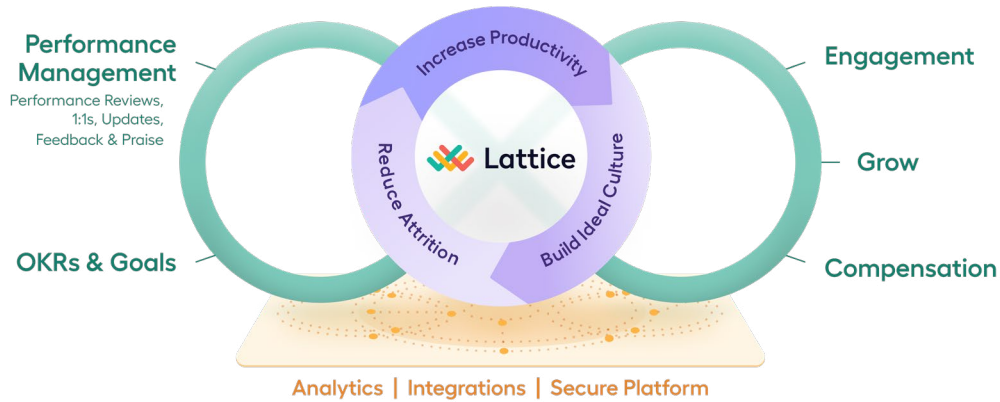
The Lattice People Success Platform

Lattice works with companies that aspire to put people first. Whether redefining the beauty industry or building self-driving cars, all of our customers have one thing in common: They value their employees and want to invest in the development and success of their people. To see Lattice's platform in action, **schedule a product tour**.

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Discover how Lattice empowers thousands of companies to build award-winning cultures.

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