

Overview

Please note that this is an overview and sample checklist. You should edit, add, and delete content from the provided checklist as necessary to customize it for your company's needs. Additionally, the content below can be customized and placed on your company letterhead to provide an overview of the purpose, support, and other key elements that comprise your company's ERGs.

ERG - Employee Resource Group

ERGs are employee led, self-directed voluntary groups that offer opportunities to network internally, to attract a diverse employee base, to provide the inclusion of ideas and solutions, and to create opportunities for mentoring and career development.

Employee resource groups exist for various demographic and diversity dimensions. Common ERGs include, but are not limited to:

- Women
- Multi-Cultural
- Working parents
- Veterans
- LGBTQ+
- Single parents

Supporting Employee's Professional Development

There are many ways that ERGs can support the professional development of employees. Examples include, but are not limited to:

- Inviting speakers to ERG meetings based on member interest
- Using their annual budget to conduct educational seminars based on member interest
- Assuming leadership roles on the ERG
- Identifying colleagues who could serve as informal mentors

Employee Resource Groups Do Not:

- Engage in any activity that is inconsistent with the company's mission or values
- 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 maybe clarify group vs individual (individuals can pursue political activities outside of company)
- Engage in fundraising activities, either internally or externally, without advance approval
- Make direct charitable donations, without advance approval

Guidance to Employees

The following is sample guidance you can provide to your employees interested in establishing an ERG:

How to Start an ERG:

Groups seeking official recognition as an ERG should submit the following information to [HR CONTACT OR OTHER APPROPRIATE PERSONELLE AT YOUR COMPANY].

- Proposed name of the group
- A mission statement demonstrating how the group will support its members and [INSERT YOUR COMPANY NAME HERE]'s commitment to diversity & inclusion
- The names of at least [SET A MINIMUM, I.E., FIVE] employees seeking to establish this group

Upon approval, your ERG can begin meeting and is expected to use the Employee Resource Group Sample Charter to develop customized objectives, KPIs, etc. Please submit a copy of this document, upon completion, to [HR CONTACT OR OTHER APPROPRIATE PERSONELLE AT YOUR COMPANY]. You can use the provided checklist to ensure your ERG is following the required procedures and recommended practices.

Organizational Support

Each group will have an annual budget of [INSERT AMOUNT], funded by [INSERT FUND/DEPARTMENT NAME – OFTEN HR], at the beginning of each fiscal year (or pro-rated based on when in the budget year the group is established). The ERG will provide an accounting of their expenses to [INSERT DEPARTMENT] at the end of the fiscal year. Unused funds cannot be rolled over to the following year. The budget is intended to support ERG activities in all offices and those working remotely.

[INSERT YOUR COMPANY NAME HERE] reserves the right to dissolve an Employee Resource Group if the leadership of the group requests that the group be dissolved, or if the group is found to be out of compliance with <Company Name> guidelines, other policies or rules.

Have a Question?

You can contact [HR CONTACT OR OTHER APPROPRIATE PERSONELLE AT YOUR COMPANY]:

[Name]

[Title]

[Email Address]

[Phone Number]

Startup Checklist

- Host informal conversations with colleagues to determine if there are enough employees to start the ERG.
- Submit required information to [HR CONTACT OR OTHER APPROPRIATE PERSONELLE AT YOUR COMPANY] to request to officially become an ERG.
 - Proposed name of the group
 - A mission statement demonstrating how the group will support its members and [INSERT YOUR COMPANY NAME HERE]'s commitment to diversity & inclusion
 - The names of at least [SET A MINIMUM, I.E., FIVE] employees seeking to establish this group
- Receive approval.
- Notify staff of the opportunity to join your ERG. This may be done in partnership with [HR CONTACT OR OTHER APPROPRIATE PERSONELLE AT YOUR COMPANY].
- Hold your first official meeting.
- Discuss and Develop the Charter:
 - Purpose
 - Roles and Responsibilities
 - Objectives
 - KPIs
- Submit the customized charter documentation to [HR CONTACT OR OTHER APPROPRIATE PERSONELLE AT YOUR COMPANY].
- Plan your activities/goals for the year, ensuring the align with the established Objectives and KPIs for your group.
- Perform activities, host events, etc.
- Submit required end-of-year bookkeeping information to [HR CONTACT OR OTHER APPROPRIATE PERSONELLE AT YOUR COMPANY].