Developing best practices for supporting marginalized identity groups through Employee Resource Groups at the City of Vancouver

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Executive Summary

Purpose
In an attempt to better support City of Vancouver employees who are members of systemically marginalized identity collective (e.g., racialized, queer, Indigenous, disabilities, women) a number of Employee Resource Groups (ERGs) were set up in 2021. The Equity Office, as the unit responsible for supporting the ERGs, is interested in finding the best practices for their implementation and development, as well as the possible challenges and how to address them, from a JEDI (justice, equity, decolonization, and inclusion) perspective.

Research approach
A literature review of academic research (book chapters and journal articles) and professional texts (forms, reports, guidelines, workshops, and conferences) was conducted, the information is situated in North America and comes from both private and public sectors. The review was complemented with a set of external (other municipalities across Canada with established groups) and internal (City of Vancouver staff who are somehow involved in the ERGs) interviews.

Report overview
Scholarly evaluation of ERGs is limited and the existing literature concentrates on the foundational stages. Most of the literature makes the case for these groups, emphasizing on general (organizational) benefits. The lines between employees and management are intentionally blurred to appeal to the community feeling. The debate in the literature is about the true purpose of ERGs: whether the organization genuinely cares about making it a better place to work or if ERGs are a superficial scheme to increase earnings and improve reputation. The benefits to employees and organization aren't necessarily exclusive- in general ERGs are more effective if they lean towards the former and the latter is a result, rather than the other way. Then, the key component is evolution. To make ERGs sustainable time and space are needed for adaptation, constant revision of challenges, needs, and even structure leads to inclusive practices. As much autonomy as the groups have, clear communication with the organization is necessary to expand in mutually beneficial ways.

According to academics, the *benefits* can be summarized in these categories:

Awareness, an avenue for learning to increase cultural and civic knowledge.

Affiliation, a sense of belonging that creates collaboration opportunities.

Access, a space for all voice to be heard, recognition of relevance of all employees.

Advancement, changes in workplace, practices of accountability and equity.

According to professionals, the benefits are divided as following:

Benefits for Employees	Benefits for Organization
•Provides social support and career advancement. •Helps employees bridge cultural differences across corporate boundaries. •Facilitate a safe space for members to share experiences without the need to conform to the dominant organizational culture. •Groups validate identity, increases self-esteem, mental health, and satisfaction. •Establishing a collective voice that facilitates approaching management about diversity and equity-related issues. •Creates a network of informed, engaged, and effective members.	•Assist with retention and advancement of existing employees. •Increases application rates for open positions. •Higher value of corporate social responsibility and reputation. •Increase employees' identification and loyalty. •Deeper understanding of organizational processes and culture. •ERG's inputs make training, performance evaluations, and networking more effective. •Innovation promoted by creating opportunities for diverse and culturally sensitive ideas.

Defining the function of ERGs allows for orderly growth. It clarifies the process, helps attract members, delineate goals, and even measure success. Four possible and overlapping functions were summarized:

Safe Space

Addresses social isolation among minorities

Serves as an internal community for employees

Discusses relevant issues to decompress or act

Organizational change

Analyses organizational structures allocating responsibility for change

Strives for organizational equity: the absence of systematic disparities in power and control over goals, resources, behaviors, agendas, cultures, and outcomes

Education and Outreach

Useful mechanism for empowering employees to drive solutions about societal issues

Creates programs that target stereotyping through education and feedback

Discusses and acts on cultural issues that are relevant inside and outside the organization

Professional development

Provides the foundation to hire, retain, and advance diverse employees

Engages in a variety of learning activities (skills development, mentoring, training) for career promotion

Gives feedback to organization on employee's commitment, engagement, and satisfaction

Challenges

Targeting. Repercussion of being identified as a member of ERG, further shunning.

Exclusion. Complaints from employees outside of demographic.

Support. Lack of understanding and commitment from management.

Finances. No assigned budget limits development.

Time. Meetings outside of work hours or difficulties managing schedules.

Adaptation. Lack of commitment from employees thanks to conflict of identification.

Promotion. Difficulties recruiting, sparse diffusion of information.

Structure. Formalization can subvert autonomy and generate confusion over responsibilities.

Rewards. ERGs are undervalued, employee's effort isn't recognized.

Tracking. Lack of clarity on how to fulfill potential or report outcomes.

Interviews

External

4 municipalities across Canada contributed to the research. The City of London exchange resources, while the cities of Edmonton, Ottawa, and Vaughan spoke with researcher. Different names were used to identify groups but the approach was more or less consistent across the municipalities interviewed, their experience ranges from 1 to 5 years. Some groups existed previously to formalization but the number augmented with the invitation, no merging or dissolution has happened, and a preference for joining existing groups precedes creation. Social Justice movements have increased enthusiasm but the COVID-19 pandemic has hindered development. A hands-off approach is taken, leaving groups to self-manage in an organic way, and communication is kept through requests or periodic meetings. The main challenge for all organizations is outreach to non-computer or out-of-office workers. Apart from that no other difficulties have been faced. An all-welcome policy allows for *allies*[1] to become members and the inclusion of an *executive sponsor*[2] is encouraged, but the last word remains with groups in all cases.

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[1]*Ally:* someone who advocates for groups or individuals who do not come from the same place of privilege as the ally. One of the first steps in race and social justice work. Becoming an ally does not happen overnight. It is a process of self-awareness and work toward unlearning social constructs. An ally is asked to accept that mistakes may be made along the way and commit to continuing their education every day.

[2]Executive sponsor: accomplished, respected, and influential leaders assigned to mentor and advocate for specific ERGs. Leaders can share the same diversity identity as the ERG's members, or not and serve as allies.

Internal

9 ERGs, represented by 15 facilitators, were interviewed for the project. All groups are at a starting point, more than half didn't know about the format previously to the invitation and all intent to focus on the social aspect (safe space) to procure a strong foundation. Desire of identification, lack of representation and hope for organizational change were the main reasons to join. Membership varies from 3 up to 40, but turnout at regular meetings is around 10 to 16 for bigger groups. Apart from the kickstart, the ERGs interviewed for this report had met between one and four times, mostly settling on a monthly rhythm. Facilitators know each other and are aware of other groups, even admitted to having or being overlapping members, but communication is limited between the ERGs.

When it comes to *allyship*, most participants preferred a hybrid approach. Allies could be invited to certain meetings and events but wouldn't be treated as members, nor have power or influence in decisions. In the case of *executive sponsors,* facilitators agreed that ERGs can benefit from someone that acts as a branch between employees and upper management and benefit the group with their lived experience (mentorship), amplifying networking opportunities, and reinforcing validation. Finally, according to the interviewees, the Equity Office can offer support to the groups in the following manners*:* accountability from City of Vancouver, diffusion of information to recruit and recognize efforts, training for facilitators, resources like IBPOC counselors or a digital library (toolkit or guideline), budget for events or specialized training, guidance on process and expectation, communication or constant feedback and updates, and validation by prioritizing employees.

Participants identified the following as *reasons why employees would be reluctant or simply refuse to join an ERG*:	In the case of their role as facilitators, *the reasons why they would step down* were:
Targeting or backlash for claiming an identity	Lack of understanding or will to change from management
Time commitment	Pressure of being equity experts and providing solutions to all challenges
Accepting members outside of their demographic	Time management
Mistrust of internal hierarchy	*Burnout* or the not having emotional strength and appropriate support
Revival of personal or collective trauma	
Conflict of identity (prioritizing one and losing the other)	Lack of knowledge or resources to engage with members or manage the group
Seeing no value to ERGs	Changing roles within the City
Being an outside and frontline[3] worker	
Lack of knowledge of ERGs.	

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[3] Employees who must provide their labor in person while others can work from home. Generally, without computer access. Category can include transportation and material moving occupations, production occupations, construction and extraction, building and grounds cleaning and maintenance, installation maintenance and repairs, among many others.

Recommendations

Best practices

Organization

Create a space for social causes and professional issues

Give autonomy to ERGs

Guide and procure advancement

Have clear communication of expectancies

Encourage outside and frontline workers to join

Use qualitative measurements

Change the notions of career

Ensure that ERGs' activities happen during work hours

Make membership a part of performance reviews

Offer various mediums for ERGs' information dissemination

Offer professional training sessions

Determine funding for groups/events

Establish a resource centre (online or physical)

Create a toolkit and templates

ERGs

Determine group's function and roles.

Have more multiple people share a role

Recognize the evolutionary aspect of ERGs

Set a term limit and develop a succession plan

Create a secondary list of members

Take ownership of your image: name, logo, and presentation information

Create a communication channel

Have a determine time and date for meetings

Set an agenda for each reunion

Establish agreements for engagement

Be open to feedback

Decenter authority, use voting system

Focus on connection between members

Collaborate with other ERGS

Introduction

Background

Definition

Employee Resource Groups, known by many other names depending on their function, are typically based on identity, demographic, generation, function, affiliate characteristics, and other interests. The foundations of these groups came from communities that faced significant collective challenges participating in society; marginalization caused by attitudinal, historic, social, and environmental barriers (Queen's University). Members tend to face challenges to equal access, opportunities, and resources furthering their alienation and creating discomfort in personal and professional ways. These subtle discrimination experiences drive employees to seek support, most commonly turning to those who are similar, creating spaces where they can be understood and move towards a fairer environment. Some organizations reserve the ERG title only for underrepresented groups but, nowadays, the opportunity to form can derive from less strenuous reasons that also benefit from alliances in the workplace.

Identity	eg. religion, disability, sexual orientation
Demographic	eg. gender, race, ethnicity, class
Generation	eg. millennials, boomers
Function	eg. sales, recruitment
Affilate characteristics	eg. veterans, care workers

Other names: Caucuses, Affinity groups, Diversity Networks, Employee Networks, Core Groups, Associate Resources Groups, Business Resources Groups, Diversity Councils, Partner Resources Groups, Advisory Groups, Internal Support Networks, and Equity-seeking Groups

Characteristics

Efforts must stem from a grassroot nature, meaning, employees need to generate the demand. These groups are created and facilitated by voluntary staff, with a horizontal structure that allows for each member to have a voice. Delineated roles can be suggested and cycled through by periods. Senior members, sometimes recognized as executive sponsors, can act in advisory roles but do not hold membership or have the power to alter the structure or decisions. ERGs develop their own agenda and determine their mission, vision, and goals, hence, should be held accountable. The groups actively engage in communicating and gathering, and as a formalized group recognized by the organization, they can do so during work hours. Additionally, they must be sponsored with a designated budget or have the possibility to request funds for specific situations or events.

Organizational equality: lack of systematic disparities in power and control over goals, resources, behaviors, agendas, cultures, and outcomes.

Functions

ERGs act as a unifying resource for both members and the organization. Recognized as vehicles for greater organizational equality, these groups provide support for employees' personal and professional needs. Their presence address social isolation of equity-denied groups, acknowledges their key role in the organization, and are meant to inform and advance participating staff. ERGs are mediums to give all employees a voice, a sense of belonging, access to information, have them take part in decision-making, value their competencies and have them express multiple identities at work. Organizations intend to foster a diverse and inclusive environment within the context of their mission, values, goals, business practices and objectives, or more specifically, their equity frameworks. Four possible overlapping functions have been identified.

| *Safe space* | *Education and Outreach* | *Organizational change* | *Professional development* |

Multiple sources trace back the origin of *Employee Resource Groups* to the mid-late 1960's racial tension, formalizing in the early 1970's with Xerox's affirmative actions regarding their African American employees (Friedman, Casey, Douglas, Welbourn et al). While the Black cohort increase in numbers so did their challenges, not only where they assigned to smaller commission zones but they felt culturally isolated in the white world of sales and management. Without anyone to turn for support, advice on how to navigate all the personal and professional implications of their new job, Black managerial employees created a mechanism to consult each other to inform top management of the existing barriers and generate a change. *Corporate Few* was the first of seven groups to form that helped make Xerox one of the best companies in the country for the Black community, and by 1980, there were 22 black employees functioning as vice presidents (Friedman 148).

By the early 1990's approximately 35% of companies in the United States had similar groups (Friedman 149), and by the 2010's 90% of Fortune 500 companies have what is now known as ERGs (The Viscardi Center). Both in the public and private sector, leaning towards the latter, and mainly situated in the US but with an exponential implementation in countries

ranging from the EU to Canada, Australia, and Japan (Mercer). Organizations have broadened beyond racial issues to add similar internal groups based on other characteristics and interests. The highly referenced Mercer report, a survey of 64 global companies in 2011, notes that the format is thriving and many companies demonstrate a resurgence of enthusiasm for these groups, however, the academic side is on the fence due to the lack of research addressing outcomes and cohesive theoretical frameworks (Welbourn et al). This report is in agreement, having identified severe time gaps in research, spanning decades between articles, and limited contemplation of identities and interests, as the information on ERGs has been hierarchized by gender, sexuality, and race.

Context

In an attempt to better support City of Vancouver employees who are members of systemically marginalized identity groups a number of Employee Resource Groups are being set up. Their purpose relates to the *Being and Feeling Safe, Included* and the *Cultivating Connections, and Collaborative leadership*[6] goals of the Healthy City Strategy, and is articulated as:

"Being and Feeling Safe and Included"[4]	"Cultivating connections"[5]	"Collaborative leadership"[6]
Goal	*Goal*	*Goal*
A safe city in which residents feel secure.	Vancouverites are connected and engaged in the places and spaces that matter to us.	Leaders from the public, private, and civil sectors in Vancouver work in integrated and collaborative ways towards the vision of a healthy Vancouver for all.
Targets	*Targets*	
Increase residents' **sense of belonging** and safety by 10%	All Vancouverites have 4 people in their network that they can rely on	
Make Vancouver the safest major city in Canada		

- Providing identify-safe spaces where employees sharing an aspect of identity can come together for connection, networking, and mutual support -a sense of community-.
- Creating the possibility of cross-identity mutual learning, inquiry and dialogues on potentially difficult issues relating to justice, equity, decolonization, and inclusion.
- Creating formal spaces at decision-making tables where staff from under-represented groups can propose and implement transformative solution for addressing City's challenges.

The Equity Office launched the invitation in January 2021 for City staff to organize and join ERGs. The tentative starting date was February 2021 and the intention for this architecture of communication was for it to be as organic, voluntary and with minimum intervention, as possible. The Equity Office offers support, administrative and financial, to achieve the previously mentioned objectives and recognizes that at this starting point it's in everyone's best interest to focus on the *community building* purpose to achieve a strong foundation that will allow groups to sustain themselves for future action. By the beginning of the research, May 2021, the City of Vancouver had 9 groups, 8 of those were interested in being formally

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[4] City of Vancouver. "Healthy City Strategy", https://vancouver.ca/people-programs/being-and-feeling-safe-and-included.aspx
[5] City of Vancouver. "Healthy City Strategy", https://vancouver.ca/people-programs/cultivating-connections.aspx
[6] City of Vancouver. "Healthy City Strategy", https://vancouver.ca/people-programs/collaborative-leadership.aspx

recognized as Employee Resource Groups. Halfway through the development of the research 2 other groups have joined.

Current list of Employee Resource Groups:

Black Staff

Employees with Disabilities

IBPOC Connect

Indigenous Staff

Queer Leaders

Trans, Gender diverse, Non-binary

Employees

Women in STEM (Science Technology

Engineering and Mathematics)

Women Planning in Color

Women in Operations

Caregivers

QTBIPOC Network

Project objectives

The objectives of this project are:

1.Collecting data on the potential of ERGs in cultivating connections and furthering the goals of equity and decolonization

>Understanding how ERGs have benefited employees and organizations through the analysis of the purpose and scope of these groups in different organizations and identifying the possible downfalls that the City should be aware of to be prepared to address them.

2. Finding the best practices for supporting the development of ERGs

>Understanding how ERGs can be set up with the best chances for success through the analysis of how multiple organizations have approached their architecture, what arrangements have permitted a sustainable development, and what resources are needed to respond to the needs and interests of the involved workforces.

Based on the learnings from primary and secondary research conducted, in close collaboration with the Equity Office staff, a set of supplementary documents, presentations, and report were developed. The project is meant to provide a deeper insight and understanding of the system and won't provide conclusive solutions, instead, a set of malleable recommendations are presented. Given that most ERGs are at a starting point the research means to supply foundational information and recognizes the evolutionary possibilities and aspects that will require further investigation in the future as the groups grow and adapt and their needs or interests change.

Research approach
Literature review/Interviews/Report

The first step of the project consisted of a literature review of academic research focusing on journal articles published in the last 10 years to have relatively recent information. Few publications were found so the time frame was expanded by decades dating back to the 1980's and book chapters were added for consideration. A large gap of data was encountered, each decade didn't have more than 10 articles on the topic, the first 20 years leaned towards race while the last 20 had a predilection for women and LGBTQ identities. Even in the most recent texts the case for ERG is still being constructed despite the interest and success that the professional counterpart reports. This situation isn't rooted on a lack of groups but missing interest from academics to report the outcomes.

On the professional side the literature was more abundant with plenty of organizational reports, sample forms, guidelines, workshops, conferences, and websites. Information was drawn from public (eg. government) and private (eg. companies) sectors, approximately balanced but leaning towards the latter. The main country to produce data is the United States and most of the case studies were done with companies from North America that operate across the world. The vocabulary changed through time and purpose, going from *caucuses* and *affinity groups* to *diversity networks* and *business resource groups*, expanding the research results but still being limited.

The literature review was complemented with a set of external and internal interviews. On the first case 8 external organizations were contacted, 1 limited to an exchange of resources and 3 other resulted in interviews with municipalities across Canada. Half of them have established groups and the other half is at the beginning stages. Given that the literature inclines towards private institutions with a business focus in the US, the external interviews were extremely valuable for their similarity with the City of Vancouver, meaning, the governmental aspect, location, and intention.

The second set of interviews consisted of meetings with staff from the City. 15 interviews were scheduled from the 18 members acting as facilitators of the ERGs. Due to the global pandemic and respective *work from home* setting all interviews were conducted via video calls, lasting from 45 minutes to 1 hour. To respect the privacy and confidentiality of the members no recordings were made and no personal information appears on this report. The intention to speak with the facilitators was to tailor the research as much as possible to respond to the specific needs and interests of the existing groups. Both the Equity Office and the Healthy City Scholar wanted to prioritize the employees' voices to make this report useful. ERGs showed a similar commitment with their quick response, thoughtful answers, and two groups extended the interview invite to all members so a thorough input could be obtained.

Findings

Literature review

The results of the research on Employee Resource Groups can be divided on four themes: *benefits, functions, challenges, and best practices*. ERGs tend to be supported by the Human Resources or the Diversity and Inclusion (D&I) department, which influences the organization's approach and results. Information on ERGs is limited and it concentrates on the foundational stages. Most of the literature makes the case for these groups, meaning, justify their existence by emphasizing on long term benefits in a general sense. Counted are the studied cases where the focus is on employees, an *organizational identity*[7] precedes. The lines between employees and management are intentionally blurred to appeal to the community sense. While this factor tends to mainly increase the interest on ERGs, it is also the reason as to why so many critics reject the strategy. The debate is whether the organization genuinely cares about making it a better place to work or if it's a superficial scheme to increase gains and reputation. The consensus is that these don't have to be opposite reasons, although there's a preference for the latter to be a result of the former rather than the other way.

Diversity focuses on bringing members of minority groups into the workforce.

Inclusion centers on providing equal access to resources, decision-making, and advancement opportunities for these individual after they are employed.

Although the terms diversity and inclusion are often used interchangeably, a clear difference is that diversity can be mandated and legislated, while inclusion arises from voluntary actions
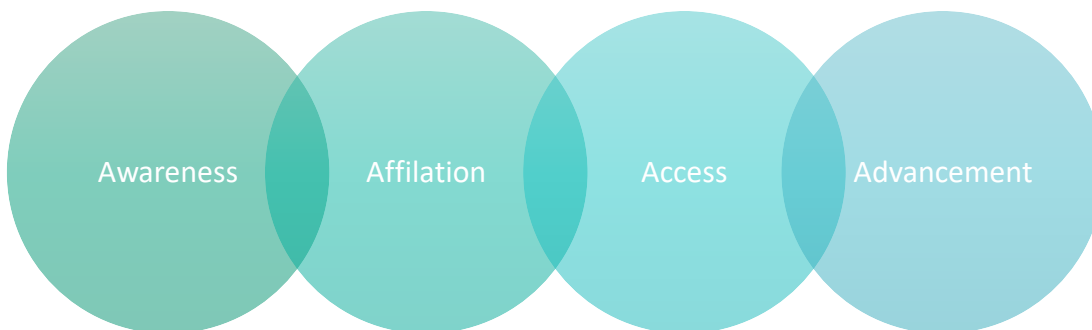
This could explain the lack of interest from academics, particularly those specialized in social justice issues, resulting in decade long gaps on article publications on the topic. Equally, it could be the logic behind the stagnant starting facet of ERGs. The promise of a *post* (feminism, race, etc.) world entices each generation's interests and expectations, resulting in roller-coaster trajectories for D&I action plans. The key isn't stopping the motion but making it sustainable through support and evolution. To achieve this, it's necessary to focus on more than the technical benefits; organizations must define the groups functions, address challenges, and constantly revise and implement new practices.

Benefits

Awareness · Affilation · Access · Advancement

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[7] Assimilation of employees' identity into the dominant (organizational) one to avoid acknowledging (dis)advantages and to justify the lack of equity work.

From an academic point of view, benefits are divided in 4 categories:

Awareness

Intended as a path for advocacy, ERGs increase cultural and civic awareness. They provide an avenue for learning where information can be shared outside of their demographic to create or promote a receptive culture that attends to the needs of various groups and thrives on knowledge instead of assumptions or outdated bias. An increase in visibility can generate psychological safety.

Affiliation

Individuals who wish to share their ideas and opinions come together not only to be seen but to be heard. The more time that they spent together, the more trust they'll have in each other, leading to stronger bonds and a bigger will to act collaboratively. Cross-cutting groups (exposure to differing viewpoints and backgrounds, including different jobs, locations, departments, and careers) hold more accurate decision making, a decreased perception of inequity, and create opportunities for authentic engagement. Positive impacts on relationships potentially reduce conflict and improves employee-employer relations. A truly inclusive environment results from good alignment between groups and organization.

Access and Advancement

The implementation of ERGs can be interpreted as a call for organizational changes, both in mindset and practices, with the intention to include employees as full (valuable) members. This includes policy changes and organizational culture. The development of a more humane and ethical workplace support diverse initiatives, aspirations, and goals, facilitating innovation and making an impact or leaving a legacy. ERGs can partly decentralized authority and extend accountability across positions and departments, demanding all parts of the organization take responsibility for pursuing the goal of integration.

From a professional point of view, benefits are divided between organization and employees:

Benefits for Organization	
	Higher external application rates for open positions. Larger poll of talent.
	Assist with retention and advancement of existing employees.
	Enhance marketing and advertising to an increasingly diverse customer base.
	Increase value of corporate social responsibility, brand, and reputation.
	Help focus on a current agenda in new ways.
	Satisfaction of a variety of need from a wider base of customers.
	Increase employees' identification and loyalty.
	Deeper understanding of organizational processes and culture.
	ERG's inputs make training, performance evaluations, and networking more effective.
	Innovation promoted by creating opportunities for diverse and culturally sensitive ideas to develop.

Benefits for Employees	Provides social support and career advancement: educational and networking activities like leadership development, mentoring programs, specialized training, assistance to conferences, hosting events, etc.
	Helps employees bridge cultural differences across corporate boundaries. Access to implicit information like societal rules or etiquette
	Communication channel within and across groups
	Generate proficiency in problem-solving, oral expression, and interpersonal abilities
	Increased knowledge of the organization (structure or administrative information)
	Facilitate a safe space for members to share experiences without the need to conform to the dominant organizational culture
	Belonging, builds a culture of trust and community within the organization.
	Groups validate identity, increases self-esteem, mental health, and satisfaction.
	Decreases feelings of isolation and enhances members' visibility.
	Create a safe environment where employees can voice concerns and offer alternatives or solutions for improvement and actualization through mutual contribution.
	Provide a space for questioning organizational norms.
	ERGs' meetings, events, and tasks can break up the day and give some intermittent relief from daily responsibilities.
	Establishing a collective voice that facilitates approaching management about diversity and equity-related issues.
	Creates a network of informed, engaged, and effective members.
	Decrease perceptions of hierarchy.
	Opens opportunity, under less pressure, to try out different lines of business.
	Enhances employee satisfaction.

Functions

Functions are not meant to be restrictive as it is possible to identify overlapping characteristics and groups can be interested in aligning with more than one. To make ERGs sustainable, facilitate the evolution and assure their survival, members and organization should be open to continuous change. Groups will naturally transform as their numbers increase and experience is obtained, however, some guidance can be provided to do so in a more orderly way. Defining the purpose(s) of ERGs can clarify roles and responsibilities as successful implementation of ERGs depends on their accountability. The following are four possible functions summarized from the common needs and interests identify through the research.

Safe space	Education and Outreach
• Addresses social isolation among minorities • Serves as an internal community for employees • Discusses relevant issues to decompress or act • Intended to generate identification with other employees • Helps employees navigate workday and generates stability • Encourages discussion for those who have felt underrepresented in the workplace • Support system to foster awareness, respect, and inclusion within the workplace	• Useful mechanism for empowering employees to drive solutions about societal issues • Discusses and acts on cultural issues that are relevant inside and outside the organization • Creates programs that target stereotyping through education and feedback • Organizes programs and hosts events, such as volunteering opportunities and open cultural events, to advise and/or increase employees, adjacent communities -family and friends- and organizational awareness through addressing their shared interest • Increases visibility
Organizational change	**Professional development**
• Fosters a diverse and inclusive work environment by promoting systemic changes • Discusses and acts on issues that are relevant to their group within the organization • Creates programs that target managerial stereotyping through education and feedback • Analyses organizational structures allocating responsibility for change; strives for organizational equity: the absence of systematic disparities in power and control over goals, resources, behaviors, agendas, cultures, and outcomes • Advises on how to increase organizational effectiveness through addressing their needs and concerns • Provides employees with the same advantages: access to the information necessary for success, productive links to other coworkers and management, the chance to contribute, and the opportunity to advance professionally • Actively seeks social justice and reparation within organization	• Provides the foundation to hire, retain, and advance diverse employees • Engages in a variety of learning activities that include topics such as skills development (leadership and career promotion opportunities) and informal learning processes (mentoring or executive meetings) to develop a deeper understanding of organizational processes and culture • Gives feedback to organization on employee's commitment, engagement, and satisfaction • Hosts events (eg. workshops, seminars, conferences) • Creates programs that target managerial stereotyping through education and feedback • Increases visibility

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Challenges

To address challenges is to recognize the systemic marginalization that continues to occur up to the present day, and to prepare for the inevitable missteps that come with growth and learning. The reality is that ERGs are still a minority within organizations that face internal conflict to organize or expand, and external difficulties that are both cause and consequence. Support comes from many sources and in many ways but it starts with the acknowledgment of problems and routes toward solutions. The following is not an exhaustive list of *potential* challenges that the City of Vancouver and the ERGs could face. Interviewees mentioned some as hypothetical concerns connected to their roles, members reluctancy, and training required but no incident has been reported so far.

> Targeting

Identifying as a member of an ERG brings a person into an undesired spotlight. Apart from the lack of privacy, this leads to exaggerated stereotyping. Supervisors, who are most likely to know about or permit employees' participation, select the individual for jobs traditionally dominated by their marginalized identity preserving between-group differences. Coworkers notice the distinction and further alienate the employee.

> Exclusion

ERGs do not include all employees in an organization. Some people feel excluded and resent the mere existence of ERG thinking that they are the ones being discriminated by not having a group that represents some part of their identity. Disagreements and resentments between employees are prompted by meetings, funding, and events. Negative reactions arise when they perceive minorities are attempting to obtain power by individual and collective means. Consequentially, ERGs' members fear isolation when they are perceived as exclusive communities.

> Lack of Support

Corporate motivation for supporting these efforts aren't altruistic and is often enabled by the capitalistic goal of improving organizational effectiveness. Some groups consider the work of ERGs paternalistic and assimilationist.
ERGs have the potential to compete against each other for attention and resources. On one side, groups with some type of privilege have more presence as acceptance comes more easily to them. On the other, members' expectations and desire do not align with the core group leading to the creation of a separate ERG and the action is taken as a threat. Consciously or unconsciously ERGs can operate from a "separate but equal" framework that maintains hierarchy.
Regardless of other identities they might hold, white people are the primary beneficiaries of ERGs in organizational settings.

ERGs have a history of being considered threats to management. Misunderstood as collective bargaining activities (i.e., salary, work hours, benefits, or any other term or condition of employment) or forming to promote political positions.

> Remuneration

ERGs are discouraged from fulfilling goals by the lack of secure funding. Organizations doesn't provide any resources for activities and events or assign limited financial resources that detracts value given to the groups. Alternatives like fundraising and membership fees are controversial practices that pressure individuals and augment chances of separation. Individuals consider ERG's tasks or activities extra work that should be remunerated for generating organizational improvements (especially in case of earnings), and for relaying responsibility of D&I to those primarily affected.

> Time management

Organization doesn't allow for ERGs' meetings and activities to be held during working hours. Given its extracurricular characteristic, members are pressured to choose between work and the group's responsibilities. Goals fall by wayside as employees juggle meeting organizational quotas and fulfilling their ERG's tasks. Depending on the group's presence and the member's role the managing of schedules becomes more trouble than reward.
It takes time for ERGs to become effective groups. Members and supervisors can be discouraged when results take longer than expected or aren't obvious.

> Difficulties to adapt

Employees have difficulties adapting to the cooperative nature of the ERGs and the process of making decisions within the group.
When multiple identities are held individuals experience conflict selecting ERGs (divergence in values, beliefs, norms and demands).
New members feel like outsiders and choose either to leave quickly or not to participate at all despite the desire to belong.
Maintaining member participation requires more commitment than individuals can and are willing to offer.
Not all employees possess the same strength of identification (cognitive and emotional involvement), and some are less likely to consistently think of themselves as a group member.
The presentation of particular issues as unified and shared among all people result in a push toward conformity among group members.
Workers ignore newly announced organizational goals and strategies to continue pursuing old goals with old routines.
Members struggle to know exactly what they are supposed to do or how much autonomy the organization grants the ERG.

> Dissemination of information

Specific ERGs have difficulties recruiting. Trying to protect privacy and confidentiality or to avoid further exposure to negative consequences, ERGs' promotion is limited to not so effective techniques.
Lack of spaces or communication systems for the distribution of groups' information.
Emphasis on mainly positive, uncritical interventions, under the discourses of empowerment, possibilities and change convey an impression of naiveness that parallels old superficial diversity discourses.

> Lack or excessive structure

Formalizing (organizational legitimating) of ERGs bring back hierarchy into the group and members start resenting each other for their roles and demands.
Including top management make members fearful of speaking forthrightly. They misunderstand executive desire to follow managerial agenda. Fear of external overtake.
ERGs are misinterpreted as being solely responsible for diversity efforts and the pressure on the groups leads to conflict or dissolvement.
Ambiguities and contradictions in the legitimization process simultaneously produce and counteract equity.
Failure to provide tailored support to under-represented employees result in less interest on forming ERGs or dissolution of existing.
Lack of formal structure (roles assignment, action plan, etc.) and a succession plan reduces ERGs' chance of survival.
Inclusion of allies or executive sponsors is seen as breach of trust and reduce membership or turnout.

> Lack of rewards

Membership **burnout.** Those involved are going above and beyond their core jobs and when that commitment isn't acknowledged, correctly supported, or there's no visible change energy is spent until there's no will to continue.
ERGs' contributions are not connected to performance management or objectives.
Employees are now expected to fulfill new expectations with a heavier toll for how intimate the work can be. Organization request meaningful contributions for partial benefits.
ERGs are viewed as low value, infantilized, or ridiculed. Seen as clubs, cliques, social clubs, or stereotyped collectives.
Plenty of individuals shy away to avoid problems or misunderstandings.
Organizations might shift the primary purpose of ERGs to unequally benefit them as opposed to investing in the development of members.
Members are not diversity professionals, lack of knowledge and experience counteracts the expectations of planning or managing activities for group and/or organization. Expectation for members to enhance the diversity program in an adequate manner when they aren't trained.
ERGs aren't acknowledged for successful initiatives that contribute to the organization.

> Outcomes and Tracking

Lack of clarity on how to fulfill potential.
Organizations can't quickly demonstrate value or success of ERGs leading to a shutdown.
Small-scale, local changes are often rejected as being insignificant; however, the day-to-day work of employee activism is largely centered around such changes.
ERGs have mixed results on the effect of increased diversity on organizational outcomes. Most cases focus on absenteeism, turnover, innovation, and performance. Research focuses far less on individual employee outcomes, including employee engagement and workplace inclusion.

Interviews

External

Half of the contact list are organizations located in the British Columbia province, the other half are municipalities across Canada; one in the province of Alberta and the other three in Ontario. The City of London, one of the two places with more experience, shared resources such as their recruitment poster, group proposal form, Terms of Reference, list of groups, and Questions & Answers. These documents aid identify requirements and expectations for ERGs' set up, as well as clarify the level of support offered from the Human Resources Office. This is the only municipality where the Diversity and Inclusion Office is not in charge of the ERGs. This contribution, alongside the Equity Office's interests, shaped the questions for the consecutive interviews.

The second organization with long-established, more than five years, formalized groups is the City of Ottawa. The other two participants, the City of Edmonton and the City of Vaughan, have less than 2 years of experience. Although, all municipalities admitted that most groups existed for far longer but in an informal way, reuniting at lunch time or after work hours. The oldest group identified is the Indigenous network in Edmonton which was active for approximately 14 years before the formalization. A similar case in the City of Vancouver would be the IBPOC Connect ERG which work as an "underground" social group and had an extensive membership previously to its official recognition, albeit with a shorter run.

> Different names are used. Edmonton knows them as Employee Resource Networks, while Ottawa calls them Affinity groups, and Vaughan, London, and Vancouver agree on Employee Resource Groups.

Groups numbers varied anywhere from 4 up to 9, no one reported merging or dissolution of existing groups, and the rate of creation of new ERGs was low; employees prefer to join existing groups. Two factors, in the last two years, have altered enthusiasm in opposite ways: the resurgence of massive social justice movements and the worldwide pandemic. Interviewees recognized the influence of Black Lives Matters, and Feminist and Indigenous movements, as a boost for affiliation. On the opposite, the Covid-19 shutdown and the consecutive home office mode took strength and capacity from employees, diminishing current groups' activities and membership.

According to all municipalities, the standard set of documents are the Terms of Reference and group proposal form, complemented by the internal website information page, but no other templates are provided. All applications are submitted through an existing internal platform, no group has been rejected so far. This led the conversation towards the main challenge for all organizations, outreach to outside and frontline workers, but no actual solution has been proposed leaving the circulation of information to supervisors.

When asked about other difficulties or repercussions the answers were more hypothetical since no municipality reported backlash for establishing the groups, targeting of members, or inconformity from individuals involved, all potential concerns found in the literature review. This must be cautiously considered since the groups' autonomy and sporadic check-in meeting with the D&I office give space for problems to be solved or dismissed within the group, never reaching the attention of the D&I office. No employee's input was given, all interviews were conducted with representatives of the Diversity and Inclusion department. Complementary challenges like the lack of assigned budget and recognition of value or utility were briefly mentioned.

The role of executive sponsor and the inclusion of allies were two of the main questions that the City of Vancouver had. Participants concur that the *executive sponsor* was one of the best practices for ERGs. Whoever fulfills that role must act as an arm in the organization, advocating for the group's goals and needs, endorsing their proposals or activities, and providing validation. The office must not interfere with the selection of the role, a democratic process should happen within, only notified once an agreement has been reached from all parties.
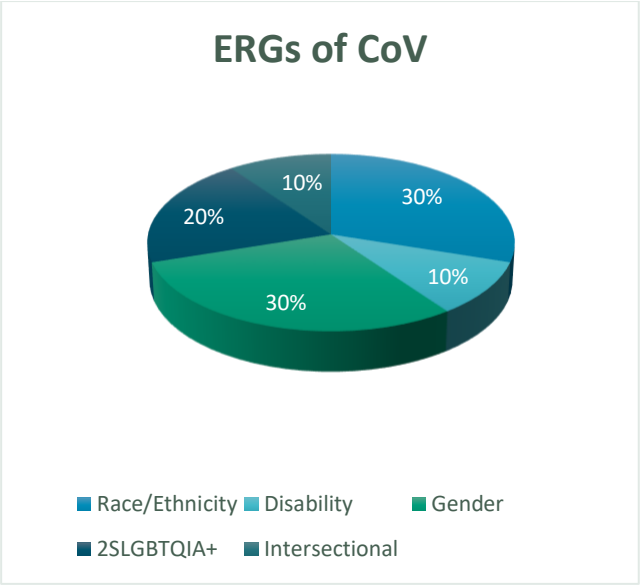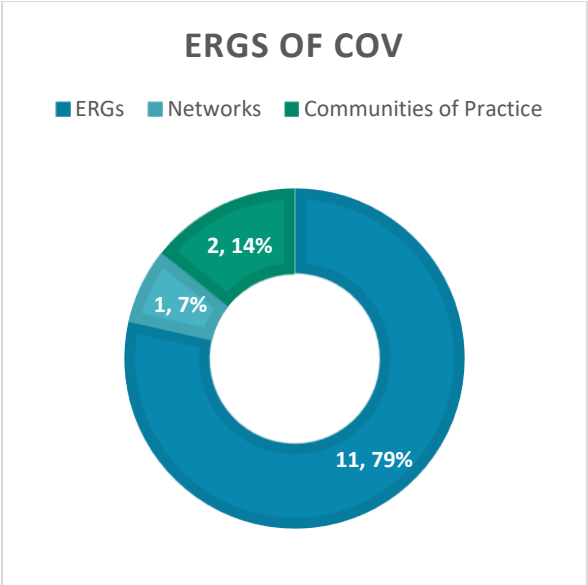
Allies, on the other side, had more complex reactions even though the consensus is that ERGs must be all inclusive. The point of contention comes from the openness in the Terms of Reference to the particularity of the groups, which are meant to make the decision even if it opposes what's established by the organization. The City of Ottawa has no restriction whatsoever, alongside with the City of London that explicitly notes supporters outside the demographic are welcomed. The City of Edmonton and City of Vaughan also have an open policy but interviewees remarked advising groups of defining allyship and boundaries to prioritize their safety.

The issue of tracking outcomes presented differently for each municipality. Ottawa has no need for it, there is no formal supervision, reports, or expectations from management. Edmonton is interested in following outcomes to assist groups and improve interaction, trying to find balance between quantitative (turnout and membership) and qualitative (satisfaction or visible/felt change) measures. Vaughan is looking for metrics that justify time commitment and technology usage to better support workers and generate understanding from management.

Lastly, all organizations agreed on the organic evolution or autonomous character of ERGs. The role of the office in charge is one of guidance, the main intervention comes at the beginning stages with the set-up, connecting individuals and asserting value. From then on, constant communication is required, if not for recording results for support (depending on what is directly asked). Meetings vary from monthly to twice per year, or whenever is requested. In case there is no chance for reunions the diffusion of updates through a brief and simple newsletter has worked for two municipalities. The other practice suggested is a facilitator's SharePoint in which feedback and resources can be exchanged.

Internal

By the time research started there were 8 *Employee Resource Groups* and 1 social group that decided against formalization. Halfway through 2 other groups were added, and by the time the report was written 1 more group submitted an application. 2 *Communities of Practice* are in the process of being set up. Interviews were requested from 10 groups, including the network, a total of 18 facilitators made the contact list. Out of those 9 groups and 15 facilitators were interviewed, 14 via videocall and 1 through email exchange. Only 2 groups asked for a joined interview. 1 group asked for the interview questions to be extended to all members.

ERGS OF COV

■ ERGs ■ Networks ■ Communities of Practice

- 2, 14%
- 1, 7%
- 11, 79%

ERGs of CoV

- 10%
- 20%
- 30%
- 10%
- 30%

■ Race/Ethnicity ■ Disability ■ Gender
■ 2SLGBTQIA+ ■ Intersectional

Starting point

Only 5 of the facilitators knew about ERGs previously to the Equity Office invitation, although in different formats. Interest in some type of community exercise was high among employees, 4 groups existed ahead of launch but multiple interviewees expressed desire to organize before learning about ERGs. Previously to formalization *IBPOC Connect* was known as BIPOC Lunch, *Queer Leaders* as Queer Drinks, and Indigenous and Black employees came together as *core employee groups* in the formation of the Equity Framework.

Reasons employees gave to join

>Desire of identification (belonging)
>Lack of representation in upper levels (acknowledgment)
>Recognition of the importance that groups have for employees and organization (validation)
>Denouncing failures within the City and demanding change (accountability)

Reasons to act as facilitators

>Putting their own knowledge, experience, and privilege to use for the benefit of others (advancement)
>Generating enthusiasm and stability before formally choosing roles
(foundational support)

Groups with 1 facilitator

Black Staff
Employees with Disabilities
Queer Leaders
Trans, Gender diverse and Non-binary employees
Women in Operations
Caregivers

Groups with 2 facilitators

Indigenous Staff

Groups with 3 facilitators

IBIPOC Connect
Women in STEM
Women Planning in Color

Some groups, with bigger numbers, took a democratic approach and selected their facilitators. In other groups, with less members, the founders intended to take the role or had no other option but to wait for growth to transition out. Everyone agreed that sharing the role make it more sustainable but, again, not all had the option to do so. Only 2 of the 15 facilitators see themselves on the position for the long run while most would prefer for it to be periodic, however, all interviewees would be comfortable with taking other roles if other members express interest in facilitating.

All groups locate themselves at the starting point, also mentioned as the networking stage. Even IBPOC Connect, oldest and biggest group in City of Vancouver, is struggling with the direction meant to be taken post formalization. The getting to know each other facet gives a strong foundation to the priority both from ERGs and Equity Office, the creation of a *safe space.* Inclination towards the social aspect prevails, members expressed the need to generate trust and a sense of contentedness before pushing for other goals or having concrete missions and visions. Nonetheless, groups do contemplate professional advancement and organizational change as consecutive steps once social stability is reached.

Some ERGs were formalized as early as February but the majority identified April as their first month. Apart from the kickstart, meetings vary from 1 up to 4, most in a monthly setting but one of the bigger groups has tried a biweekly mode on different days and hours so it's more accessible. Considering the world is still going through a pandemic all reunions have been online. Only one group has hosted an event, a conference on the International Day of Women in STEM. Membership ranges from 3 up to 40, even though turnout is around 10 to 16 for bigger groups.

Facilitators admitted knowing of other groups as they were introduced in a general meeting, but less than half maintain communication related to ERGs with others than their co-chairs. All expressed interest in exchanging resources and personal knowledge but suggested that in order to do so a communication system, like a SharePoint, needed to be established by the Equity Office. Membership overlap it's relatively common, even some of the facilitators identified themselves as being part of other ERGs but only had this role in one group.

Concerns

The consensus as to why ERGs would dissolve was the lack of accountability from the City. If the ERGs were used to fulfill quotas, dismissing equity objectives and frameworks, and justifying it under the groups' existence. This was also confirmed as a common concerns in the literature review.

Reasons why a facilitator would step down	Lack of understanding or will to change from management. Scarce support from departmens (supervisors), nule or minimum advancement with workplace improvements, etc.
	Unreal expectations of being _equity experts._ Facilitators shouldn't be expected to have all the knowledge and to be in charge of offering and implementing the solutions. A joint effort should happen within the group and with the organization.
	Time management. The combination of a busy schedule, personal life events, and ERGs' activities happening during non-work hours would force employees to prioritize and leave the groups behind.
	Burnout, not having emotional strenght and appropiate support. Feeling overworked, underappreciated, having high levels of stress, or being in a constant state of conflict without reinforcements or help.
	Lack of knowledge or resources. No training, no guidance, no access to relevant information, etc.
	Changing roles within the City. Even when those might be planned, adjusting to new roles (responsibilities), people and/or spaces has to be prioritized.

Reasons why an employee wouldn't join	Concern for their privacy and confidentiality	Targeting or backlash, furthering marginalization, or increasing of stigma
	Time commitment	Work overload, guilt for lack of contribution or partial assistance to meetings and events
	Membership and hierarchy	Inclusion of supervisors endangering trust or concern over power plays
		Need of supervisor's approval
	Revival of trauma	Topics might be too sensitive or difficult to talk and hear, continuous suffering
	Identity conflicts	Insecurity and indecision over multiple identities
		Needing to work on themselves before approaching/being a good member
	Lack of value	Believing groups are a waste of time, no hope for change or improvement
	Being an auxiliary or outsider worker	No access to technology required, no fixed schedule, no contact
	Lack of knowledge	ERGs being relatively new and having limited diffusion of information

Allyship

When it comes to accepting allies in the group most interviewees expressed hesitation. 2 groups with single facilitators preferred close membership and the rest leaned towards a hybrid approach; allies could be invited to certain meetings and events but wouldn't be treated as members, nor have power or influence in decisions. Presented with the option of *Communities of Practice* all groups agreed these alternative set of groups for allies could have positive effects and ERGs would be willing to occasionally work together if they aren't expected to be responsible for the CoPs.

Those against felt that fully open membership would defeat the purpose, safety and identification, of groups. Those in favor felt that the honest way to achieve change is working in team and even with the opposition, allies could act as bridges with general population and could provide different points of views to round up solutions. Few even suggested allyship as a discreet level of success. All facilitators concur that the decision would be reached between all members after a discussion that has yet to come.

Communities of Practice
Groups of individuals who engage in shared activities across a particular domain using an equity lens. People who are working and learning together within a common interest toward specific goals. Normally compromises 3 areas:

Domain > Commitment to shared interests and goals, as the community forms and prospers shared competencies and strategies are created to meet stated objectives. The domain is the membership's distinct entity.
Community > Sustained through engagement, a group turns into a community when they substantially engage with each other to promote learning and development. Creates a repertoire of actions for change.
Practice > Constructed through collective experiences and history, intentionally acquired knowledge, and continuous interactions. Repertoire that aids adept community.

Executive sponsors

The facilitators were similarly divided on the question of executive sponsors as they were on the allyship one. The minority of participants considered that executive sponsors weren't necessary at the foundation stage or once the ERG grows. On the other side, coinciding with external interviewees, interested members believe executive sponsors can be a branch between employees and upper management and benefit the group with their lived experience (mentorship), amplifying networking opportunities, and reinforcing validation.

Support

ERGs' facilitators deem support from the Equity Office has been fairly distributed so far. Interviewees expressed satisfaction with the treatment and easily identified those in charge of offering guidance. An emphasis was given to this section of the interview aiming to make this project as useful as possible. The following are ERGs' requirements and expectations for the Equity Office to help secure groups' survival.

> Accountability: continuous acknowledgement of systemic disparities and efforts to generate organizational change. Follow up with identified issues, doing the work of equity: frameworks
> Diffusion of information: internal communication with other facilitators (specific channels) and external outreach to potential members or supporters
> Training: workshops, conferences, courses, etc. on group management, membership engagement, facilitation of discussion, safe space creation, and others
> Resources: legal aid and counselors from IBPOC community, access to knowledge (digital library), toolkits or guidelines
> Budget: assigning an amount to be used for specific training or events
> Guidance: clarity on processes, expectations, and situations outside ERGs' responsibilities
> Communication: constant feedback, keeping ERGs informed, progress update
> Validation: use of work hours, technology, and spaces, championing, prioritizing members' safety

Recommendations

Be patient

Effectiveness depends on a massive number of factors and people and there's no identifiable endpoint, every organization is unique. Social identities are complex and the work of equity does not happen easily and in a quick manner. Identity cannot be eliminated, nor should it be diminished, however, an emphasis on shared values and common goals can aid opening to partnership. Grassroot efforts generally have an intrinsic level of commitment and can deeply impact at an individual and broad level. The establishment of these practices strengthens engagement but does not take away organizational responsibility (embed accountability, authority, and expertise). Prioritizing employees inevitably leads to significant effects for the organization. ERGs have the potential to be a multifaceted learning system for all involved but need long term support.

Best practices

Organization

> Give space for ERGs to focus on attributes and causes that go beyond professionally centered issues so they bring greater sense of meaningfulness and connection.
> Always provide guidance and advice to those considering forming an ERG, follow the whole process from inquiries to set up and development.
> Be clear and explicit communicating expectancies for the ERGs to all employees. Previously delimit Equity goals and objectives and measure impact of ERGs on it.
> Open groups to all employees, including hourly, union, and out-of-office workers.

> Determine how the voices and data from the ERGs will be shared with management and other members of the organization to attract support, members, or justify existence.
> If measurement of impact is required balance quantitative (membership and turnout) and qualitative (employee's perception), leaning towards latter.
> Change the notion of career to incorporate a wider array of work practices, like ERGs, in work hours.
> Release work time for ERGs' meetings and activities.
> Make membership part of performance reviews.
> Create a New Hire Welcome Letter: redact a template that can be added to onboarding package to attract new ERG members in a discrete yet broad way.
> Create brochure or poster to include in recruitment packs for job candidates and set aside time in orientation for ERGs to talk to incoming employees.
> Host an ERG Day, also known as Fair or Kick-off event, for promotion and recruitment.
> Create multiple communication channels in collaboration with ERGs. A newsletter or monthly email with executive insights, special interest stories, employee highlights, ERG spotlight, and holidays/heritage months.
> Promote in advance the events, not just report the accomplishments.
> Offer professional training sessions, communicate with groups to know what they need or want.
> Assign a budget for each group and notify them of requirements to use it. Make process as simple as possible, like submission of electronic forms.
> Recognize the work members put into the groups, with and outside ERGs.
> Every time information on ERGs is publicized make an emphasis on the benefits of joining.
> Create a Resource Centre, online or physical, to provide access to knowledge needed by ERGs.
> Create official toolkit or guideline with forms and templates that ERGs can adapt.
> Office contributions should translate into involvement, no demands. Give groups the autonomy to self-sustain and be open to feedback on Office-ERGs relation.
> Add questions to employee satisfaction/engagement surveys regarding involvement in ERGs or participation in ERG events.
> Collaborate with other similar efforts that are happening in the similar communities: interact with ERGs from other municipalities.
> ERGs need to decide if allies are welcome. Research suggest allies are valuable if the ERGs are interested in adjusting/changing organizational policies.

Employee Resource Groups

> Determine group's type or function. Does not need to be restrictive, group can grow into other paths or have branches with different or specific focus but, a foundational purpose will dictate the number of available members and the skills which to draw on make it sustainable.

> Define roles. Clarity on responsibilities and expectancies allows members to commit and make the most of their experience.

> Allow for multiple people to have the same role, particularly in the case of facilitators. Shared responsibility diminish pressure and extends membership.

> Recognize ERGs life cycle. Most effective groups are evolutionary; function, roles, and goals should be constantly revised and altered to allow growth and survival.

> Define a term limit for all roles. Give opportunity to all members to engage in various ways with the group. All voice can be heard and all experiences contribute. Avoid burnout.

> Determine succession plan. Prevents dissolution or stalling, recognizes enthusiasm, and promotes innovation.

> Create a secondary list of members. Employees who can't fully commit but want to contribute can be contacted under certain terms or for specific moments/events without feeling guilt over absence or limited support.

> Take ownership of your image:
    o Choose a name that reflect the group's composition and intention. Can be as simple and direct or as creative as needed. Can be turned into a logo for easy recognition.
    o If the "Mission-Vision-Goals" set seems excessive have a simple introduction that details group's purpose. This will be used by the Office to promote the group (appear on website or other materials).
    o Create your own recruitment poster or brochure.

> Set an exclusive communication channel for members.

> Set a time and date for meetings. Depending on the size of the ERG, multiple reunions might be needed.

> Set an agenda. If done previously it can be shared with the invitation/reminder and help members decide to assist or skip. If done at the beginning it's easier to attend to member's needs and eases time management.

> Time track. Be aware of how much time you spent on ERGs and how, useful if reporting is needed.

> Establish agreements for engagement. A set of rules, reached collectively, can generate trust between members and prevent conflicts. Could be as simple as to how

participation will occur or as complex as to what topics can and cannot be discussed. Prioritize safety. Emphasis on respect and privacy.

> Have periodic surveys to receive feedback. A consecutive meeting to address issues and share contributions demonstrates receptiveness and recognizes members' value. An exit survey can collect important data too.

> Use a voting system, even when representatives are selected all issues should be discussed and agreements must be reached. Always keep members updated.

> Focus on connection between members. Meetings and activities should be designed to foster conversation, should never feel like lectures or an information dump. Interaction is key.

> Collaborate with other ERGs. Whether is it exchanging resources, hosting events together, or joining strength to present demands to management.

Next Steps

Three main recommendations to the Equity Office for supporting Employee Resource Groups

1. Offer a wide range of training to facilitators of ERGs

Training is one clear and common request. Participants have requested coaching of foundational skills like project management, discussion facilitation, creation of a safe space, conflict resolution, technology use, among others. The preparation can boost facilitators and ERGs' trust in themselves, reinforcing the feeling of support from the Equity Office. After a survey of needs an offer can be made for all interested members, although, at the starting point, it's suggested for the focus to be on facilitators or key members. After some experiences has been gained, facilitators can request either a repeat or a more tailored session according to their members.

Ideally, educational opportunities will be offered simultaneously for the entire organization. To continue the work of equity, offer a chance of allyship, and even to avoid the sense of exclusion from employees outside the demographic, an array of related courses should be available. An invitation to supervisors is encouraged. ERGs' session can aid identified topics or concerns that need to be address and derive into these complements.

2. Create an official toolkit

A compilation of tools, resources, and contact list that new and existing groups can resort to. One part can come directly from the Equity Office, the inclusion of Terms of Reference, information on other groups, templates for invitations, emails, posters or brochures, and forms for group creation, budget requisition, etc. The other can be a collaborative effort with trainers that come in for each session, providing summaries, activities, or any possible kind of tool. Online resources and contact information (coaches, counselors, legal aid, etc.) supply opportunities for direct communication and tailored planning, encourages group's autonomy.

3. Constant feedback with ERG.

Communication of progress in all matters related to ERGs, as well as the general equity work whenever it's possible. If an issue or situation has been located or reported, whatever the timing might be, updating groups shows the work or commitment. To avoid saturation an agreement can be reached between all parties on the ways communication will happen, either a periodic meeting, emails, or newsletter. Effort should be reciprocated from ERGs.

Conclusion

Project Limitations

Through the report certain limitations have been identified. A time gap in academic research publications; a drought spanning through the decades with two possible explanations, either the promise of a *post*-world in which identity would no longer be an issue for conflict, or the overtake of the business aspect that diminish equity reasons and turned the groups into a capitalist practice for the sole benefit of organizations. The former could explain the ups and downs of the enthusiasm and establishment of ERGs around the globe, the latter could justify the lack of interest from equity academics. They aren't opposite reason but complementary, and it also serves to understand the apparent stalling of the format, always on the promise of a better future but deeply focused on the beginning stages. Results have, indeed, been reported, but the tendency goes towards quantitative measurements. The Equity Office intentions align with qualitative purposes, hence, the limited collection of data.

Another difficulty was the timing of the projects. On the City's side, the invitation to set up the groups had to be moved to the early months of 2021, later than it was planned because of the COVID-19 pandemic. This meant that by the time the research for the report started most of the official ERGs were on the beginning stage and the project needed to be slightly altered to attend to foundational aspects more than the development. The interviews findings rely on immediate needs balanced with hypothetical scenarios and issues. Participation came from a modest sample, few organizations in Canada could be contacted, and less so with long experience. The external interviews happened with the Diversity & Inclusion Offices, none of the municipalities' ERGs' facilitators or members were consulted, limiting the collected information to management knowledge and the interviewees' point of view. The internal interviews were conducted only with the facilitators, who showed hesitation on certain topics and expressed the need to further discuss it with all members before giving a definitive answer or admitted to being far from the point where the issues cross someone's mind.

Originally, the project intended to complement the interviews with a workshop to share the results, followed by a focus group to get feedback on the points of interest from the ERGs to further investigate and tailor the report as much as possible. Due to time constrain, from the participants and the researcher, this part had to be taken out reducing even more the information. Lasty, a more informal approach was taken to encourage discussion, there were no recordings of the interviews. The data collected was annotated and coded by researcher, hence it could be bias in this regard. Finding should not be generalized, these limitations should be taken into account.

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Appendices

Appendix A – Definition and Functions

What are **ERGs**?

Employee Resource Groups, also known as *Affinity groups*, *Caucuses*, *Diversity Networks*, among many other names depending on the purpose or intention.

- Based on **identity or demographic** (eg. race, ethnicity, sexuality, religion, gender, etc.), **life stage** (eg. older workers), or other factor that experience barriers to equitable participation in the workplace (eg., **caregivers**)
  - Intended to advance equity and decolonization within the workplace
- Spaces where employees from marginalized groups can come together for social connection, sense of community, networking, and mutual support
  - Support cross-identity mutual learning, inquiry and dialogues
- Formalize the connection between City's leadership and staff
  - Builds relationships and channels for two-way exchange and co-creation of solutions
- Voluntary and employee-led, all members hold the same status
  - Horizontal distribution of responsibilities and evolutionary membership
- Possess autonomy to develop their own agenda
  - Self-organizing and coordinated by members, determines the criteria for membership, etc.
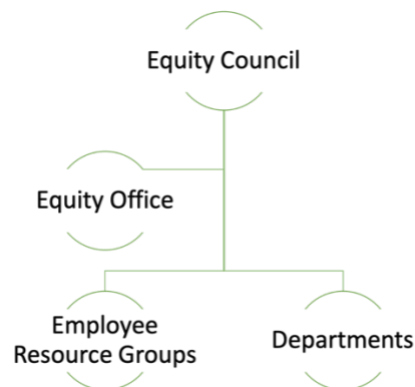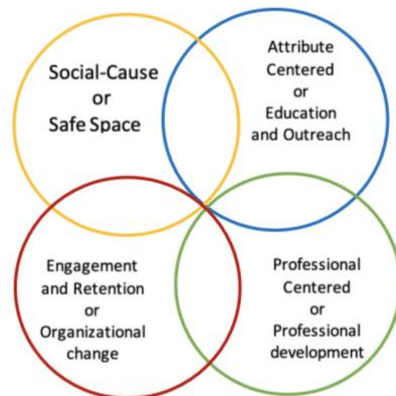
ERGs are not:

- Promoting political positions
- Seeking remedies for individuals
- Department's official representatives or spokespersons
- Responsible for the Equity Frameworks and implementation
- Forming or evolving for the purpose of opposing other groups
- Support groups for employees outside the demography (allies)
- Participating in any collective bargaining activities (eg. salary, work hours, benefits, or any other term or condition of employment)

Functions of ERGs

ERGs can be focused on one or more of these and this focus could evolve over time. Although these functions are listed separately, they also overlap, e.g., increasing visibility, education, advocacy.

Safe Space	Education and Outreach
• Singular focus, identification with the group • Addresses social isolation among minorities • Encourages discussion for those who have felt underrepresented in the workplace • Serves as an internal community for employees • Discusses relevant issues to decompress or act • Support system to foster awareness, respect, and inclusion within the workplace • Helps employees navigate workday and generates stability • Gives all employees a voice, a sense of belonging, access to information, have them take part in decision-making, value their competencies and have them express multiple identities at work	• Useful mechanism for empowering employees to drive solutions about societal issues • Discusses and acts on cultural issues that are relevant inside and outside the organization • Creates programs that target stereotyping through education and feedback • Organizes programs and hosts events, such as volunteering opportunities and open cultural events, to advise and/or increase employees, adjacent communities -family and friends- and organizational awareness through addressing their shared interest • Increases visibility
Organizational change	**Professional Development**
• Fosters a diverse and inclusive work environment by promoting systemic changes • Discusses and acts on issues that are relevant to their group within the organization • Creates programs that target managerial stereotyping through education and feedback • Analyses organizational structures allocating responsibility for change; strives for *organizational equality*: the absence of systematic disparities in power and control over goals, resources, behaviours, agendas, cultures, and outcomes • Advises on how to increase organizational effectiveness through addressing their needs and concerns • Provides employees with the same advantages: access to the information necessary for success, productive links to other coworkers and management, the chance to contribute, and the opportunity to advance professionally • Actively seeks social justice and reparation within organization	• Provides the foundation to hire, retain, and develop diverse employees • Engages in a variety of learning activities that include topics such as skills development (leadership and career promotion opportunities) and informal learning processes (mentoring or executive meetings) to develop a deeper understanding of organizational processes and culture • Gives feedback to organization on employee's commitment, engagement, and satisfaction • Hosts events (eg. workshops, seminars, conferences) • Creates programs that target managerial stereotyping through education and feedback • Increases visibility

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Appendix B – How to prepare for a meeting?

This is a brief checklist[8] of items to think about before going into a meeting, useful concepts to practice during, and some tips to help you stay focused and keep the conversation flowing. A satisfying outcome will depend on two things: *how you are* and *what you say.* Independently of "positive/negative" emotions or situations, how you come into the meeting and how you board the topic impacts everyone's outtakes. A conscious and respectful commitment to the group's well-being will help develop trust, meaningful relationships, and create a space for honest communication. Support can be offered once everyone is grounded.

Let's start with **consent**

Permission to say or ask anything is priceless. It allows us to fully express ourselves: to seek what we want, to give feedback, to speak up about issues when we find the need. By announcing what we intend to talk about or what we expect of the meeting we are setting the level of candor. For those who speak without holding back or editing their words, who want to listen and give a chance to be fully heard, who want to say exactly what they are thinking and to be respected for it, there needs to be a consensus that the meeting is exactly the place and moment to do so.

Establish agreements of engagement

Facilitators can provide a basic set of agreements from the beginning. Once those have been discussed the members are asked for complementary or specific requirements to add. The group won't advance until everyone it's comfortable and accepts the terms.

It's all about **safety**

When members feel their comments will be listened to and treated with respect, they are more likely to be vulnerable and say exactly what they are thinking or feeling. Conversations become broader and deeper when everyone is involved and feels safe enough to speak their minds. Be prepared for members to reject topics of discussion, don't assume the community's experience is similar, nor their wish to educate everyone on their particularity. Be willing to admit mistakes made. Expect emotion to rise to the surface, do not minimize them. Trust and commitment are constantly earned.

Most have experienced settings where they felt unheard and underappreciated, to prevent a repetition of it here are some suggestions:

> Ask the group to devote their attention to the person speaking
> Allow each member to take their time and complete their thoughts
> Ask follow-up questions for clarity if necessary
> Share what is valuable about someone's question or comment
> Use people's names and refer to earlier comments they've made

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[8] The information in this document is an amalgamation of various resources meant to respond to the City of Vancouver's ERGs' concerns mentioned in the interviews and consecutive meetings.

> Make an open invitation for those silent but do not signalize individually
> Summarize what was discussed as the meeting come to an end
> Acknowledge the quality of the conversation
> Thank all the group

And remember, **do not share the conversation with others without permission**. What happens at the meeting stay *only* with those involved unless it's discussed otherwise.
Before going into the meeting, think:

- *What is the purpose for having the meeting? What do we hope to accomplish? Do they align with your personal, sometimes hidden, purposes?* You may believe it's beneficial when it's excessively critical, condescending, or even triggering for some members. You may want support but never at the cost of other. Listen to what is being said, analyze the intentions, and decide whether is the right moment or place to bring your topic up.
- *What assumptions are you making?* You may feel intimidated, belittled, ignored, or disrespected, but be cautious about assuming that this was the intention. Approach the facilitator or open the discussion with all members, be honest without being hurtful.
- *What buttons of yours are being pushed? What is being triggered? Are your emotions correspondent to the situation?* You may still be part of the conversation if you wish; if you are not in a mental/emotional state for it you have the right to step away.
- *How is your attitude toward the conversation influencing your perception?* If you think this is going to be horribly difficult, it probably will be. If you believe that whatever happens, some good will come of it, that will likely be the case. Again, a consensus should be reach to avoid imposing difficult topics on unwilling members or at inadequate moments.
- *Who is present? Who are the members? What might they be thinking about this situation? Are they aware there's a concern? If so, how do you think they perceive it? What are everyone's needs?* It's not about opposition but partnership.
- *What are your needs? Are there any common concerns? Could there be? How have you contributed? What is your role? How have the others or how can they? What is it that you want from them?*

During the meeting, you can:

Step #1- Inquire

Remember that you don't know anything and be open to try to learn as much as possible from all the point of views available at the meeting. Enter every meeting with an attitude of curiosity and will to discover.
Listen to every member until they are finished. Don't interrupt except to acknowledge, and even then, do it in the least obtrusive way. Whatever you hear don't take it personally, do not assume, unless it is stated other way: it's not about you. Challenge ideas not people. Don't rush things, everyone can have a turn.

Step #2- Acknowledge

Purposely show that you have heard and understood (or are trying to). If you can't repeat their argument, ask questions, try to clarify, explain what you understood to corroborate everyone is on the same page. Be patient and give time and space for a response.

Acknowledge as much as you can, including your own defensiveness if it comes up. Sit with it, decide how to address it before continuing. Silences might be awkward but they are also necessary, help re-center everyone.

Step #3- Advocate

It's your turn to speak. What have you identified with? Reinforce to support. What can you see form your perspective that theirs missed? Express or clarify without minimizing theirs. Show commitment to the back-and-forth, don't just (dis)agree, advocate for all sides.
Facilitator's tip: Allow for the subject to be organically spent. If everyone's (or the majority's) energy has been expressed ask for a consensus to move on.

If needed:

Step #4- Problem-Solving

Once all voices have been heard you are ready to build solutions. Brainstorm, if not for final solutions, for steps to create bridges towards it. Encourage sustainable proposals. If the conversation turns adversarial, go back to inquiry. If the energy isn't there, call for a break. Make it clear it isn't a dismissal and be sure to return to it once strength has been recovered.

What NOT to do

- <u>Avoid accusatory or critical phrases</u>. Constructing walls around yourself or others, becoming defensive.
- **Don't minimize a person's pain.**
- <u>Don't give advice.</u> Unless it is explicitly asked from you, sometimes all one needs is to be heard.
- <u>Don't issue ultimatums</u>. Everyone is a valuable member and deserves respect. Give space for mistakes and address issues whenever is needed but do not try and over control the situation by pressuring or scaring someone into agreeing. Compromise is key and shouldn't be rushed.
- <u>Don't expect other to be mind readers</u>. Avoid the belief that everyone knows what you are thinking or how you are feeling, or that the (dis)agree with you. Be explicit with what you need and want without imposing.
-

When to hold back?

- **If you are trying to show off**. Right before you speak up ask yourself why you are doing it. If it's only to show how much you know, it's only repetition and not contribution, better to let someone else talk. Let the meeting run its natural course. Add, do not subtract.
- **If you are trying solve problems that aren't yours to solve**. Sometimes helping is letting others find their own solution. Do not become a crutch, do not try to be the one who "always" has an answer. If you know someone else might know about what's being discuss pose tailored questions that might inspire others to talk. Support with a brief reinforcement after they have contributed.
- **If your comment would be better left for a one-on-one conversation.** Some issue can be addressed in a group, some can be spoken privately to avoid a bigger conflict. It will depend on the trust and the context.
- **If your comment will affect the moment or others.** Cannot stress this enough, being part of a community is trusting and respecting each member. Boundaries must be set. Naturally, the more that time passes, the better you'll know what people can and won't tolerate. You might be hurting but that doesn't mean you can impose it on others, that's not how the burden is shared. You might

believe it insignificant but not everyone will agree. While some discussions are necessary, they cannot be forced upon unsuspected parties, that way no solution will be reached or relief felt.

- **If your comment is likely to damage relationship inside or outside the group**. Sometimes the feeling of safe space makes it attractive to gossip, to report a wrong-doing or critique colleagues who are not in the room. While this can help us feel seen and validated, it can become the basis for animosity in the workplace. If you're going to share a story involving other colleagues, ensure their anonymity, remember that they are not here to speak to the conflict from their side or to clear up a mistake or misunderstanding. Be fair. You can use the safe space to process and make sense of events, but don't trash and destroy your colleagues.
- **If you're reporting a care of overt discrimination or wrong doing**. Consider that this may not be the venue for such a report, as it puts others in the group in the awkward position of needing to respond to take action on your behalf. Consider instead reporting directly to the Equity Office or following other proper channels for reporting discrimination and bringing forward grievances.

Sources/Resources

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PsychCentral, Tips for Talking About Tough Topics, 2013.

Appendix C – Membership Responsibilities Checklist

Facilitation – Facilitators and Co-chairs
- ❑ Lead and coordinate member activities
- ❑ Act as the points of contact for the Equity Office and for ERG members
- ❑ Act as a spokesperson for the ERG
  - o Provide visible and vocal support and advocacy
- ❑ Provide annual summary of activities and accomplishments
- ❑ Keep members engaged and address team issues that arise
- ❑ Communicate ERG recommendations, insight, activities -results- with Equity Office
- ❑ Facilitate the development of the ERG's vision, processes, group agreements
- ❑ Liaise with the Executive Sponsor and participate on the Equity Council (to be established)
- ❑ Assist the Equity Office in capturing and communicating the impact of ERG
- ❑ Develops, implements, and is accountable for ERGs goals

Coordination and Administration
- ❑ **Coordinate meetings**: schedules, agendas, minutes, etc.
- ❑ **Goal tracking:** establish and monitor annual work plan
- ❑ **Budget management:** develops and executes plan with allocated budget
- ❑ Develops, implements, and is accountable for ERGs goals

Communication and Networking
- ❑ **Recruit and coordinate member activities**
- ❑ **Establish and maintain an intranet site for the members**
- ❑ **Act as a spokesperson for the ERG**
  - o Provide visible and vocal support and advocacy
- ❑ Develops, implements, and is accountable for ERGs goals
- ❑ Respond to invitations for input channelled to the ERG through the Equity Office
- ❑ Organize and coordinate with *other* ERGs

Community Involvement
- ❑ Develop and implement action plan for cultural/professional activities
- ❑ **Advise on, coordinate, and participate in social, networking and celebratory events** associated with the group's purpose
- ❑ Organize and coordinate events with *other* ERGs and the organization
- ❑ Explore opportunities to work on joint projects, discuss challenges and collaborate on solutions

Members
- ❑ Provide subject matter expertise advice on issues, policies and procedures
- ❑ Provide informal peer support and resources to employees within their diversity dimension
- ❑ Act as informal champions to raise awareness to employees outside their diversity dimension
- ❑ Assist in recruitment outreach activities within their demographic community
- ❑ Volunteer for task and able to follow through
- ❑ Regularly attend meetings and complete assigned tasks
- ❑ Actively supportive of the ERG's purpose and activities
- ❑ Develop, implement, and is accountable for ERGs goals

Equity Office
- ❑ Facilitate the establishments of ERGs
- ❑ Provide logistical and administrative support and advice in the development and implementation of the ERG work plan
- ❑ Assist the group in navigating potential barriers
- ❑ Be aware of and selectively participate in activities of the ERG
- ❑ Approve the ERG work plan and funding requests
- ❑ Monitor implementation and results of the ERG work plan
- ❑ Solicit advice and support from the ERG for applicable workplace diversity and inclusion initiatives or issues
- ❑ Facilitate alignment of plan and activities across all ERGs
- ❑ Provide support to the ERG facilitators to engage members and address team issues that arise.

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Appendix D – Mission and Vision Guidelines

Mission and Vision are statements from the organization that answer questions about *who we are*, *what do we value*, and *where we are going.*

- Should be established in collaboration with all ERG members and be linked to specific **goals** - clearly articulate specific activities and timelines – or **strategy.**
- Together, they should communicate both the organization and the group's core values and common interest
- The simplest and clearest way to explain the overarching purpose of your group
- Keep the statement short and use simple terms that everyone understands
- Make sure to be flexible enough to allow for goals to change over time
- When expressed clearly and concisely, they can motivate your team, or the organization as a whole

Three critical roles:
(1) Communicate the purpose
(2) Inform strategy development
(3) Develop the measurable of success

What's the difference?

The two statements do distinctly different jobs. Both statements should be core elements of your ERG. **Mission** statements define the organization's purpose and primary objectives. These statements are set in the present tense, and they explain why you exist, both to members of the organization and to people outside it. Short, clear and powerful.

Vision focuses on aspirations. These statements are designed to be uplifting and inspiring. They're also timeless: even if the organization changes its strategy, the vision will often stay the same. It should serve as your ERG's guiding light.

First steps can be simple enough as to gather the insight of every member of the group, as it grows and evolves you may need to be more selective while still ensuring that you capture a fair range of voices.

Here are some guiding questions to help you create your Employee Resource Group's statements -outline the structure, goals, and guidelines of the group-.

Statement:

What is the ERG's purpose?

What values motivate that effort? What are the core values of the group?

Who shapes your vision? Who are your members?

What opportunities or needs exist that your group can address?

What are the short and long term goals?

What resources are needed for each goal?

Who will take the lead in the implementation of each goal?

What are reasonable and achievable timelines?

How does the ERG's mission compares with the Equity framework?

How is this group different from other groups in the company?

Outcomes:

How will we measure success?

How have ERGs impacted the City?

Are employees who participate more engaged, satisfied or promoted?

Have your efforts been linked with recruitment strategies?

What have been the ERGs outcomes?

Are members held accountable for results in their ERGs?

Are outcomes tied to an aspect of the performance review?

Meetings and Events:

How often will your group hold meetings?

What will be the purpose of the meetings?

What events will your group organize?

What activities will you engage in?

Input:

Have you surveyed employees to learn their views on your current ERGs?

If employees are not involved, what are the barriers?

If an ERG member, what are the benefits of involvement?

BRIEF EXAMPLES

Association of Black Faculty, Administrators, and Fellows

WELCOME to the home page of The Association of Black Faculty, Administrators and Fellows (ABFAF). ABFAF strives to support and advocate for the University's Black community. We provide a means of communication, interaction and counseling for members through seminars, discussion groups, and social gatherings. The Association of Black Faculty, Administrators and Fellows is a university-wide group, and is open to all faculty, administrators, fellows and staff.

Association of Harvard Asian and Asian American Faculty and Staff (access)
Disabilities ERG, MIT (access)
Argonne African American ERG (access)

DETAILED EXAMPLES

Association of Harvard Latinx Faculty and Staff
Description
The Association of Harvard Latinx Faculty and Staff (AHLFS) was founded in 2009, through grassroots efforts by a number of employees here at Harvard University. AHLFS was established to promote, support and advance the needs and goals of Latinx faculty and staff at Harvard University. Membership is free of charge and open to all faculty, administrators, fellows, and staff at all levels employed by Harvard University and its affiliates who support the mission of AHLFS.
Mission
The Association of Harvard Latinx Faculty and Staff is dedicated to articulating, supporting, and advancing the needs and goals of the Latinx community at Harvard University.
Vision
The Association of Harvard Latinx Faculty and Staff will establish itself as a channel of communication to address challenges and opportunities impacting the Latinx community at Harvard.
Goals
> Assist Harvard in the increased recruitment, retention, and promotion of Latinx faculty and staff.
> Develop a nurturing and empowering community for Harvard's Latinx faculty and staff through professional development and social networking activities.
> Maintain an inclusive, supportive and dynamic system that addresses the needs of Latinx faculty and staff.
> Increase the visibility of the work and accomplishments of Harvard's Latinx's in the larger Harvard and Metro Boston community.
> Establish partnerships with campus Employee Resource Groups (ERGs), programs, departments, faculty & administrators at all levels that support AHLFS mission to enhance access to Harvard resources.

Family Caregivers Employee Resource Group, Salem State University (access)
Lesbian, Gay, Bisexual and Transgender Resource Center, University of California San Francisco (access)

FULL CHARTER

Committee on the Concerns of Women (access)

Sources/Resources

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Business News Daily, How to Write the Perfect Mission Statement, 2020. (Samples provided)

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Harvard Employee Resource Groups, Association of Harvard Latinx Faculty and Staff, 2021.
Office of Economic Impact and Diversity, Application & Guidelines for Chartering an Employee Resource Group, 2013.
University of Minnesota, Principles of Management, 2010.

Appendix E – External Interview Questions

Three main general questions:

1. How are ERGs set up?

2. What is working for your ERGs?

3. What isn't working for your ERGs?

Detailed questions

1. When did the ERGs start?

    How long have the groups existed?

2. How were the ERGs set up?

    What was the organization's approach to setting up the ERGs? Was it an employee request?

3. How many groups do the organization has?

    Have all the groups survive? Have some groups disappeared?

4. Why are ERGs important to your organization? How have the ERGs shaped the organization?

    Positive effects: How does the company measure ERGs' success?

    Negative effects: What challenges/barriers have the company identify with/for ERGs?

5. What's the procedure to set a new ERG?

    Are ERGs supervised? (Ex. by an office member or annual report)

    Does the organization offer economic support to ERGs?

    How is the budget assigned? What activities has it been used for?

    What events or activities have shaped the ERGs and organization?

    What communication channels exist for ERGs?

Appendix F – Internal Interview Questions

1. Can you define ERGs?

2. Can you define your ERG?

> Why did you join? Why is it important to you?

> What do you expect? What do you want out of it?

> What are the goals of your ERG?

3. How did the group start?

> Who set up the ERG?

> How did you learn about your ERG?

4. Can you think of a reason as to why someone wouldn't join an/your ERG?

> What would make you leave your ERG?

5. Do you have contact with other ERG members?

> Are there any overlapping members?

6. What do you know about other ERGs?

7. How do you feel about including allies?

> Should they have their own group?

8. How do you feel about including executive sponsors?

9. Why is it important for the city to have ERGs?

10. Do you feel that the support is well distributed between all ERGs?

> What does support mean to you? To your ERG?

> How do you want to be supported? What will make you feel supported?