Progressing Towards Success: Maximize Your ERG for Business Impact

Wednesday, October 7
11:00 AM – 12:30 PM
Progression Model Levels

Foundational

- Managing self
- Ad hoc
- Initial
- Independent

Formal

- Managing self and team relationships
- Emerging (structure, process)
- Standardized
- Repeatable

Functional

- Managing self, team, group, internal partner relationships
- Defined
- Measured
- Reliable

Integrated

- Managing self, team, group
- Well-developed internal & initial external partner relationships
- Aligned
- Disciplined
- Predictable

Dynamic

- Managing self, team, group, partner, organizational, external relationships
- Sought-after as a resource
- Adaptive
- Synthesized
- Agile

PUSHING ERG’s value to rest of organization

ERG is PULLED IN as a resource
Best Practice At Each Phase of Progression

**Foundational**

“It is very difficult, in the Chinese culture, to start an LGBT group...so interested ERG leaders are partnering with the Young Professionals BRG to attend events and create community in safety.” – Retail Bank

**Formalized**

“Our ERGs track their accomplishments and budgets, with quarterly reporting to their Executive Sponsor and annual reporting to D&I and HR. Our planning process is designed to closely mirror that of the organization, increasing members’ planning skills and the ERG’s credibility as a business unit.” – Barclays Global Investors

**Operational**

“Our Women’s Network helps recruit and retain female leaders around the globe to ensure female representation significantly increases. We built a portal that can be accessed by any member around the world....In the last year alone, 20 new Women’s ERG chapters were launched, even one in Pakistan.” – Colgate-Palmolive

**Integrated**

“Our Asian ERGs developed training packages for sales and marketing teams, and business leaders, to provide guidance and advice on the nuances of doing business in Middle Eastern and Asian countries.” – Boeing Corporation

**Dynamic**

“Our commitment to Inclusion has led to the creation of a Center for Leadership Inclusion that sponsors research and publishes findings. It is a place where we can gather our people, clients and thought leaders to redefine Inclusion in the 21st century workplace.” – Deloitte Consulting
Business Resource Groups at Outerwall
Outerwall’s Business Resource Groups

AFA’s mission is to promote Outerwall, Inc. as a military friendly company that encourages, supports and promotes members and veterans of the Armed Forces, their families and allies.

InCrowd’s mission is to cultivate a strong and self-reliant group of highly-engaged LGBTA professionals, where inclusion is prioritized, diversity is respected, and a qualified talent pool is valued.

MOST’s mission is to cultivate a climate of respect and understanding for cultural differences in the workplace. And to provide multi-cultural persons with support, and the ability to support others, through shared goals and group activities.

Our BRG will engage the hearts and minds of our community of stakeholders regarding the interests of persons with disabilities and their caretakers such that our leadership, company culture, policies, practices and products enable full participation by all employees and consumers in the Outerwall experience.

WIN’s mission is to empower the women of Outerwall to achieve their full potential and to support the company’s business.
What our BRGs do

Represent Outerwall externally

- Recruitment
- Marketing
- Customer retention
- Connections with our communities

Drive New Initiatives with Diverse Insights

- New product development
- Messaging
- Market research/insight

Vehicle for internal development & support

- Communications
- Retention
- Professional development
- Mentoring
- Perspective on Company policies and projects
- Initiate “real” conversations in workplace
<table>
<thead>
<tr>
<th>Phase 1: Foundational</th>
<th>Coming together and covering the basics</th>
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</thead>
<tbody>
<tr>
<td>Phase 2: Formalized</td>
<td>Developing structure and focused activities</td>
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<tr>
<td>Phase 3: Operational</td>
<td>Standardizing processes and sustainable activities that serve members and the organization</td>
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<tr>
<td>Phase 4: Integrated</td>
<td>Integrating everything we intend and do with what the organization intends and does</td>
</tr>
<tr>
<td>Phase 5: Dynamic</td>
<td>Recognized and valued as integrated business partner to organization and community</td>
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</table>
“Engage the hearts and minds of our community of stakeholders regarding the interests of persons with disabilities and their caregivers such that our leadership, company culture, policies, practices and products enable full participation by all employees and consumers in the Outerwall experience”

### Strategic Focus

#### Community Partnership
- Establish a relationship with a CCG Partner in OBT, Bellevue and San Diego
  - National & regional footprints
  - Volunteer opportunities for employees
  - Provide education & awareness for employees
  - Be an advocate/ally for OUTR

#### Business & Employee Resource
- Influence OUTR business strategy & plans to better serve PwD, their caregivers and the communities we serve
  - Prioritize areas (e.g. recruiting, employee/public accommodations, product offerings, kiosk & web UI, etc.)
  - Leverage education and community partnership efforts to ID opportunities and inspire process owners

#### Employee Awareness
- Establish an education & awareness platform for employees
  - Leadership competency
  - Library of materials
  - Events focused on areas of employee interest
  - Leveraging of community partnerships

### 2015 Objectives

#### Community Partnership
- In partnership with CSR, conduct search and select CCG(s)
- Conduct launch event – July/Aug?

#### Business & Employee Resource
- Expand resource library for caregivers
- Document current company-wide PwD efforts
- Provide focused education to process owners

#### Employee Awareness
- Feb BRG Fair in San Diego
- Partner with AFA “Hiring America’s Heroes” event (disabled vets) – May
- Alzheimer’s/dementia speaker event – Jun
- Disability Employment Awareness Month Event(s) – Oct
- Conduct 2 additional events TBD

### Priority Initiatives
- Expand membership and leverage for volunteers to drive key focus areas, events and initiatives
- Expand LT to include program manager/secretary
- Create “Ambassador” roles that serve as local liaisons
- Collaborate with and leverage efforts of other BRGs (events, resources, community partnerships)
- Create relationship manager for community partner organizations

### Enabling Platform
- Mission
- Progress SOAR BRG maturity from Phase 1 Foundational to Phases 2/3 Formalized/Operational
ESGR in the News
01/14/15
Outerwall Affirms Support for National Guardsmen and Reservists

SEATTLE, Wash. – The Employer Support of the Guard and Reserve (ESGR) today announced that Outerwall Inc. signed a Statement of Support for National Guardsmen and Reservists.

Demonstrating its support of employees who are serving in the National Guard and Reserve Forces, Outerwall Chief Executive Officer Scott Di Valerio joins other employers in pledging that:

- We fully recognize, honor and enforce the Uniformed Services Employment and Re-Employment Rights Act (USERRA).

- Our managers and supervisors will have the tools they need to effectively manage those employees who serve in the Guard and Reserve.
Lesbian, Gay, Bisexual and Transgender PRIDE Month
Walt Disney Parks & Resorts
Diversity Resource Groups
The Progression Model Journey

- The progression model is a **flexible** framework
- Groups can move both **forward** and **backward**
  - Especially during key events like leadership changes or strategic realignment
- Regardless of the level the ERG was operating in, the model allowed us to identify the **support, knowledge** and **resources** they needed to further mature
Foundational

- What we were good at...
  - Member networking events
  - Professional development (e.g. resume and interviewing advice)
  - Community Engagement
- Programming was primarily driven by member interest
  - Often programming didn’t have a strong link to business objectives or goals of the organization.
Formalized

- Formalized structure and governance
  - By-laws and refined operating procedures (for ERGs and D&I)
- Allowed flexibility while maintaining consistency
  - Voting, appointment processes
  - Flexible hierarchy
- Identified necessary skillset for leadership positions
Operational

- Alignment led to natural connections to the business
- Example: HOLA (Hispanic/Latino ERG) ERG
  - Cultural Celebrations & Guest Experiences
    - Provided key insight and recommendations to business leaders
    - Ensured cultural relevance
    - Most of the recommendations were adopted
    - Impact was measured through metrics
Integrated

Workforce Inclusion
- Ensure employee population is demographically diverse in a way that reflects the communities in which the organization operates.
  - Recruitment/Diverse Talent Pipeline
  - Professional Development
  - Talent Planning
  - HR Policy & Procedures

Workplace Engagement
- To create an inclusive culture that recognized employee’s unique needs and utilizes their diverse talents.
  - Work Environment
  - Education & Training
  - Mentorship Programs
  - ERGs/Diversity Council

Marketplace Connection
- To utilize diverse suppliers, engage the community, and position the organization to meet the needs of a global marketplace.
  - Philanthropy & Outreach
  - Multicultural Marketing
  - Supplier Diversity
  - Diverse Products & Services
Integrated

- Marketplace Example: PRIDE (LGBT) and Gay Days Anaheim
  - ERG played a pivotal role with the external organizer of Gay Days Anaheim
  - Assisted a shift in mindset from tolerance to acceptance
  - Demonstrated positive financial impact
  - Event is officially sponsored by the PRIDE ERG
Dynamic

- ERGs were aligned with internal and external partners
- Example: PULSE (African American) ERG
  - Celebrate Gospel:
    - The ERG went out into the community and found **diverse** choirs from all over Southern California.
    - Community stakeholder engagement
    - Linked to talent acquisition
- ERGs received recognition externally
Employee Networks at Bank of America

Kevin England, Diversity & Inclusion Manager

October 2015
About Our Employee Networks

Bank of America's employee networks are a vital part of the company's diversity and inclusion efforts. The employee networks are formal, bank-supported groups made up of employees who share a dimension of diversity along with their allies. The groups meet periodically to network, mentor and encourage each other's development, leadership and success.
Employee Networks

Overview

North America
ALN  LEAD for Women
BPG  LGBT Pride
DAN  MSAG
HOLA NAPN
IGEN PCN*

Latin America
BPG LEAD for Women

Europe and Emerging Markets (Ex-Asia)

DAN  MSAG (Military Network)
MLN  LEAD for Women
PCN*  LGBT Pride

Asia Pacific
LEAD for Women
DAN  YPN
PCN*

The ENs are a vital part of the bank’s diversity and inclusion efforts. There are 12 ENs organized globally and more than 200 chapters.

ALN  Asian Leadership Network
BPG  Black Professional Group
DAN  Disability Advocacy Network
HOLA  Hispanic/Latino Organization for Leadership & Advancement
IGEN  Inter-Generational Employee Network
LEAD for Women  Leadership, Education, Advocacy & Development for Women
LGBT Pride  Lesbian, Gay, Bisexual & Transgender Pride
MLN  Multicultural Leadership Network
MSAG  Military Support & Assistance Group
NAPN  Native American Professional Network
PCN*  Parents and Caregivers Network
YPN  Young Professional Network

* A GOXO supported Network.
Inclusion is at the heart of our strategic framework

**Community Involvement**
Networks play a role in helping Bank of America contribute to a Better World

**Recruitment**
Networks play a role in propelling Bank of America forward as an Employer of Choice

**Business Strategy**
Networks play a role in ensuring Bank of America’s Competitive Advantage

**Professional Development**
Networks play a significant role in maximizing Bank of America’s Global Intelligence and Leadership Capability

**Workplace Environment**
Networks play a role in creating a more Inclusive Workplace Culture
Priorities and progression model

With the five core focus pillars, Employee Networks will assess their current capabilities and use the five levels of growth as a developmental guide.

<table>
<thead>
<tr>
<th></th>
<th>Focus</th>
<th>Description</th>
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<tbody>
<tr>
<td>1</td>
<td>Foundational</td>
<td>Managing self, ad hoc, initial, independent, member-driven, community-focused, local</td>
</tr>
<tr>
<td>2</td>
<td>Formalized</td>
<td>Managing team, emerging structures and processes, standardization, repeatable, events evolve to programs, collective objectives</td>
</tr>
<tr>
<td>3</td>
<td>Operational</td>
<td>Managing internal partners, defined, initial measurements and impact, reliable, business/functional collaboration, programs evolve to initiatives</td>
</tr>
<tr>
<td>4</td>
<td>Integrated</td>
<td>Managing external partners, well-developed internal and external partner relationships, aligned with business units, scalable efforts, disciplined, succession planning, leader development</td>
</tr>
<tr>
<td>5</td>
<td>Dynamic</td>
<td>Managing organization, sought-after resource, aware and adaptive, synthesized, agile, strategic value-add</td>
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</tbody>
</table>
# Bank of America Progression Model
**Sample for Levels 1-3 only**

<table>
<thead>
<tr>
<th>Level 1 - Foundational</th>
<th>Level 2 - Formalized</th>
<th>Level 3 - Operational</th>
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</thead>
<tbody>
<tr>
<td><strong>Recruitment</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EN sporadically engaged in recruiting efforts</td>
<td>EN formally and consistently engages in recruiting efforts</td>
<td>EN is leveraged to expand recruiting talent pools and referral base</td>
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<tr>
<td>EN members make referrals through standard referral process</td>
<td>EN demonstrates a tracked and measurable presence in recruiting efforts</td>
<td>EN builds sustained partnership with recruitment</td>
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<tr>
<td>EN hosts basic or one-time development workshops and seminars</td>
<td>EN hosts strategically planned professional development opportunities</td>
<td>EN leadership role is perceived to be a positive and sought-after developmental opportunity</td>
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<tr>
<td>EN has no formal mentoring programs</td>
<td>EN advises and participates in L&amp;D and talent initiatives</td>
<td>EN becomes a key driver of mentoring programs</td>
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<tr>
<td><strong>Professional Development</strong></td>
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<tr>
<td>EN sponsors or participates in EN-related cultural fairs and celebrations</td>
<td>EN creates increased opportunities for visibility of constituents, and perhaps high potentials</td>
<td>EN collaborates with other ENs to examine, understand, and drive shared workplace improvement efforts</td>
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<tr>
<td>EN builds EN-related awareness in the workplace</td>
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<tr>
<td><strong>Workplace Environment</strong></td>
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<tr>
<td>[Not a focus at this level]</td>
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<tr>
<td>EN includes clients in events</td>
<td>EN is sporadically consulted on leads and feedback on new product offerings (operating as an in-house focus group)</td>
<td>EN connects to current and prospective clients for business development, and begins to advise on diversity best practices</td>
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<tr>
<td></td>
<td>EN begins to form strategic connections with BACCV and key community partners</td>
<td>EN educates employees on internal banking products</td>
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<tr>
<td></td>
<td>EN recommends key partnerships, consolidates investments</td>
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<tr>
<td><strong>Business Strategy</strong></td>
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<tr>
<td>EN is involved in volunteer activities on an ad hoc basis</td>
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<tr>
<td>EN events are created in isolation, not in partnership with community volunteers</td>
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<tr>
<td><strong>Community Involvement</strong></td>
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Annual planning

Each Employee Network completes an annual planning process, including a self-assessment of its current performance in each of the five Employee Network focus areas.

<table>
<thead>
<tr>
<th>Employee Network Focus Area</th>
<th>Current Level</th>
<th>Please include details and examples as to why you selected this level</th>
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<tbody>
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<td>Community Involvement</td>
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Goals are set at the enterprise level for each Employee Network, focusing on one primary “pillar” and one secondary “pillar” for the year.

Individual regions or chapters, where applicable, may also use the self-assessment on an annual or as-needed basis.
LGBT Pride Employee Network at Bank of America

Bank of America's LGBT Pride Employee Network represents lesbian, gay, bisexual, and transgender (LGBT) employees and their allies. Our members are dedicated to promoting a safe, equitable, and inclusive environment for LGBT employees and to fostering a workplace that recruits, develops, and retains top LGBT talent.

We work to raise awareness of LGBT issues, and we are a resource to our members, allies, and managers at all levels. We work to position Bank of America as a brand leader by identifying and supporting revenue generating customer and client activities, and reinforce the company’s long-term commitment to their LGBT customers and clients and the community.
LGBT Ally program

**Education**
- Ally guide
- LGBT Pride Ally video
- Online resources
- LGBT Training and Panels, Ally 101, Bi-sexuality 101 and Transgender 101

**Ally Program branded collateral**
- Welcome letters
- Ally guide
- Badge/stickers
- Business cards
- Desk/ tent card

**Events and networking**
- All allies are invited to LGBT Pride events once signed up
- Global training sessions and events depending on location

**SharePoint site**
- Database housing our allies and out at work teammates
LGBT Pride – Training & Panel series

- Face-to-face and virtual sessions
- Includes educational material about LGBT issues, cultural competency, terminology, basic overview of legal and employment issues
- Panel discussion with current employees discussing how LGBT issues have affected them in the workplace
- Leveraged with senior executive leadership to build awareness of issues and advocacy for corporate policy changes
- To date, thousands of leaders worldwide have participated in one or more sessions

![LGBT Training & Panel Discussion](image)

**Instructor-led Course**

This event will focus on creating a shared vocabulary and the issues our lesbian, gay, bisexual and transgender teammates face in the workforce, as well as the issues and questions you have top of mind.

![Ally 101](image)

**Instructor-led Course**

Allies play a critical role in the LGBT movement and are often effective and influential voices for LGBT advancement. Allies are key in a person’s coming out process, they help others understand the need for equality, fairness and acceptance and often help build bridges where they did not previously existed.

This session will provide tangible, practical advice for people who want to learn what they can do to be an effective straight ally to the LGBT community and advocate for equality. This session is targeted to straight allies and LGBT alike and attendees will receive information they can use as well as share with other straight allies in their lives.

You will be able to:

- Assess what you have and what you still need to develop to become an effective ally
- Understand the specific steps you (or others) can take to become a more effective ally
Applying what you’ve learned
Mapping Your Progression

- Foundational
- Formalized
- Operational
- Integrated
- Dynamic

DIVERSE WORKFORCE (Attraction & Retention)

DIVERSE TALENT (Development & Engagement)

INCLUSIVE CULTURE (Education & Engagement)

REPUTATION IN MARKETPLACE (Customer & Community Outreach)
We Look Forward to Continuing the Conversation

Email us at: info@jenniferbrownconsulting.com

Thought Leadership and more information can be found on JBC’s website:

- [http://www.jenniferbrownconsulting.com](http://www.jenniferbrownconsulting.com)
- Follow Jennifer on Twitter: @jenniferbrown