

Facilitator's Guide
Making it Count for ERG Leaders:
Your Role as D&I Change Agents

VisionSpring
Inclusion Learning Loop

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INTRODUCTION

What is an Inclusion Learning Loop™ Training Toolkit?

The Inclusion Learning Loop™ training toolkits are complete out-of-the box training curriculums that provide Inclusion Learning Loop™ members access to a library of diversity- and inclusion-related workshops. All of our toolkits include facilitator materials, a PowerPoint presentation, pre-work or foundational materials and an action planning worksheet. Each of our training toolkits equips trainers with all the information, tools and materials needed to deliver a rich and comprehensive development experience.

What is the Making it Count for ERG Leader Toolkit?

The Making it Count for ERG Leaders: Your Role as Diversity & Inclusion Change Agents is a two-hour training that can be leveraged by D&I practitioners as part of their training offerings. The training is designed to help ERG leaders recognize and understand how they are uniquely positioned to support the diversity and inclusion strategy.

Who is it designed for?

The intended participant is employees who are stepping into a new ERG leadership role. This workshop is designed to be delivered by diversity and inclusion practitioners and trainers. **Some facilitation skill and an intermediate-to-advanced level of D&I competency is required to lead a successful meeting.**

How can you use it?

This workshop can be included as part of your organization's internal D&I training offerings. This workshop can be delivered by a facilitator who has training skills and knowledge of diversity and inclusion. You will also find the PowerPoint presentation to accompany this facilitator's guide. Tools to enhance subject knowledge are provided on the [Inclusion Learning Loop™](#).

This exercise can be effectively executed in 90 minutes to two hours depending on the size of the group and the amount of time you want to dedicate to discussion.

Exercise objectives:

During this workshop participants will deepen their understanding of diversity and inclusion, the role of an ERG leader and how ERG leaders can serve as effective change agents. The goal is to help participants better understand Diversity and Inclusion and why it's important.

Learning Outcomes:

- Discuss the concepts of Diversity and Inclusion and the connection to overall mission and goals
- More deeply explore the critical role ERG leaders will play in achieving D&I objectives
- Explore opportunities for advancing inclusion at the individual and organizational level
- Strengthen your own D&I capability

Materials:

Flip chart and markers

Tape to post flip chart pages

Name tags or cards (depending on audience)

Copies of Action Plan Worksheet for each participant

A [PowerPoint](#) Presentation had been provided as part of this toolkit

Facilitator Preparation: Review Content and Materials

Familiarize Yourself with the Workshop Materials and the Content

1. Review Facilitator Guide
2. Review [PowerPoint](#)
3. Review background information materials to become knowledgeable on the content
4. Additional reading materials can be found in the [Articles Section](#) – ERGs on the Inclusion Learning Loop™

Decide if you will Assign Participant Pre-work

Decide if you want the participants to read articles prior to the workshop or if you want them to “hear” the information for the first time via the presentation.

1. Suggested articles

[Leading Without Authority: Demystifying A Common ERG Leadership Challenge](#)

[How to Effectively Lead Your ERG](#)

2. Decide how you would like to use the materials
3. If assigning as pre-work, send the link to all participants at least one week prior to the workshop

Assemble all Workshop Materials

1. Review materials list and secure through proper channels
2. Decide if you are going to print participant materials or supply them electronically to all workshop attendees.
 - a. if yes, print [participant materials](#)

Workshop Agenda

Section I: Welcome and Introductions (15 minutes)

Opening Remarks
Present Session Objectives
Ice-Breaker Exercise – I Am Statements

Section II: What, Why & How of Diversity & Inclusion - (25 minutes)

Large Group Discussion–What Does Diversity Mean to You? - 10 minutes
Presentation – Sharing of Definitions & Key Concepts – 5 minutes

Section III: The Role of ERG Leader- (25 minutes)

Presentation - the Role of ERG Leaders in D&I – 10 minutes

Section IV: Interactive Exercise - (30 - 55 minutes depending on how you structure the exercise)

Interactive Exercise – What would you Do? Scenarios – 25 - 45 minutes
Exercise Debrief and Learning Points – 5 minutes

Section V: Personal Action Planning (20 minutes)

What Did I Learn?
What Will I Do?
Prepare Action Planning Worksheet

Section VI: Wrap Up, Actions and Next Steps (5 minutes)

Review of Learning Outcomes
Next Steps

Section I: Welcome and Introductions

Welcome, Workshop Objectives and Agenda

Say: *Good morning. We are happy to be here today and are looking forward to the workshop! In today's session we are going to explore the concepts of diversity and inclusion with a specific focus on the role of Employee Resource Group Leaders. The goal is to better prepare you for your new role and to help you better understand how you are uniquely positioned to advance D&I at **your company**. Throughout the next couple of hours, we will:*

- *Discuss the concepts of Diversity and Inclusion and the connection to overall mission and goals*
- *More deeply explore the critical role ERG leaders will play in achieving D&I objectives*
- *Explore tools and resources to enhance your ability to drive change*

Ground Rules

*Listen actively
Be open to new ideas
Ask questions
Parking lot
Have fun*

Section II: The What, Why and How of Diversity and Inclusion

Group Discussion

What does diversity mean to you?

Engage participants in a large group discussion. Consider flip charting responses. The objective is to get people talking about diversity and to deepen their understanding of the current perceptions regarding diversity.

Allow 2 minutes for discussion.

Summarize responses and share the definition for diversity.

Diversity is defined as the broad mix of human and organizational differences and similarities. In the most traditional sense it refers to dimensions of diversity that are more visible and easy to define such as associations with certain racial, gender and cultural groups.

Today organizations are also including dimensions relating to age, sexual orientation, religion and disability into their definitions of diversity and in their diversity and inclusion strategies.

In the broadest sense diversity embodies all difference, including socio-economic status, level of education, dimensions of thought, and relational aspects.

Dimensions of Diversity

- Age
- Marital Status
- Background
- National Origin
- Generation
- Socioeconomic Status
- Length of Service & Expertise
- Political Affiliation
- Education and Learning
- Personality
- Physical Ability
- Sexual Orientation
- Job Function
- Work Style
- Ethnicity
- Race
- Gender
- Religion
- Health
- Thought
- Job Function

Add your own definition of diversity.

What comes to your mind when you hear the word inclusion and how is that different than diversity?

Open to participants for large group discussions. Consider flip charting responses.

The purpose of the discussion is to help participants understand the distinction between diversity and inclusion and the importance of inclusion. Diversity without inclusion is not enough.

Allow 2 minutes for discussion.

Summarize discussion and share the definition of inclusion.

Inclusion is the practice of providing a sense of belonging to all individuals so that they are welcomed, respected, encouraged and valued as an employee and can contribute their best work.

Add your own definition of inclusion.

What do you think the term diversity management means?

Diversity management is the strategy and ability to get the best from the mix of employees, customers, suppliers, and other stakeholders in order to achieve organizational objectives.

The desired outcomes (the value proposition) are a product of diversity management, not just diversity or inclusion. It is not just having a broad mix of people or treating each as a valued member of the team; it is the deliberate strategy to use that diversity to full advantage in achieving strong business results and competitive differentiation.

Diversity and Inclusion can be linked to desired outcomes in 3 main areas:

- **Workforce** by expanding access to top talent
An organization's commitment to diversity continues to be a competitive advantage in the war for talent. A well-crafted D&I strategy that values the relationships and knowledge of all employees enables an organization to access, recruit and retain the best and the brightest. Your talent is arguable to most important success factor in driving results.
- **Workplace** by improving employee engagement and productivity
Leveraging the knowledge and ideas of all talent in order to realize the benefits associated with diversity requires inclusion. In an inclusive workplace, employees are more productive and engaged, thus enriching the exchange of ideas, reducing the costs associated with employee turnover and increasing profitability.
- **Marketplace** by enhancing your effectiveness to reach and serve clients and customers.
Leaders and managers can drive marketplace results by leveraging diversity and inclusion in support of the organization's market expansion and growth goals. Leaders can draw on the market intelligence and ideas of a diverse employee base to gain insights regarding buying habits, product innovations, marketing and sales.

How can ERG leadership help drive our D&I strategy?

Dig a little deeper. Ask participants to share ideas. How are ERG leaders uniquely positioned to help the organization understand and respond to the needs of its employees?

What about its customers or clients?

Flip chart responses-this may help inform your strategy moving forward.

Share some ideas of your own that may not have come up in the discussion.

Summarize the conversation.

Learning Points:

- Diversity is all around us and it is what makes each of us unique. Diversity exists in every organization and can be encountered in every human interaction.
- Diversity is about creating a diverse mix of people in your organization, while inclusion is about creating an environment that respects, values and leverages that difference.
- Diversity management is the discipline of leveraging that diverse mix of people in order to realize benefits that support the business.
- Managing diversity simply means managing people effectively.
- Employee Resource Groups can be instrumental in supporting the goals and success of its members as well as the overall strategic priorities of the organization.

Action Planning Worksheet

What have I learned as a result of this session?

How does what I have learned apply to my current situation?

Conclusions: How can I apply what I've learned to improve my effectiveness as an ERG Leader?

What are some things my ERG can do to support its members and the organization?

1.

2.

3.

Accountability Coach:

Follow up Meeting Date:

Action Items: Required Support: Deadline:

Section VI: Wrap Up, Actions and Next Steps

We want to close out this section first and foremost by thanking you for your time today.

We also ask you to commit to do four things:

1. Complete your action plans in the next 48 hours.
2. Refer back to your plan and make progress every week.
3. Meet with your accountability coach in the next 4 weeks.
4. Embrace your role as change agent

Review any additional next steps for your organization.