

EMPLOYEE ENGAGEMENT TOOLKIT:

# How to Start Your CSR Program



# INTRODUCTION

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We get it. Starting a corporate social responsibility program can feel overwhelming. There are probably hundreds of ideas swimming through your head and in a perfect world, or on any other team, you could just start the ideal program format and run with it. But CSR is a little different.

A successful program requires buy-in from key stakeholders. It requires data analysis, strategy, finding the right partners, and even if all of that gets pulled together, your company's employee engagement might not reach the levels you expect (or desire) at first. So what is a practitioner new to CSR supposed to do?

We cannot stress enough the importance of creating a program that aligns with your company's values. Before even jumping into CSR ideas or strategies, consider the bigger picture. Identifying corporate vision, values, and philosophies pertaining to CSR now will allow you to align policies, strategies, and even your future software solutions later. Start thinking of your company's position on key tenets of giving. One consideration is whether deducting fees from an employee's donation to cover your program's operating expense is acceptable to your company- and the potential message that can send to your staff, consumers, and the market at large. Last but certainly not least, it's important to be transparent in your decisions with your employees. Often knowing the why behind what you have decided can eliminate falsities and skepticism about your program's intentions.

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“Regardless of which strategy you choose, the most important part is... preparation. Strategies cannot be created overnight. If you think [CSR] is something you want in your programs, the time to start making connections and planning is now.”

## Setting Up the Program

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This section of our toolkit focuses on the basic steps needed to create a CSR strategy. At the very least, it's necessary to assimilate your new program to your company's core values, understand stakeholder concerns, analyze data, create a structure that links to corporate strategy, identify nonprofit partners, and in the end, get your team involved!

These are the core tenets of creating and launching a CSR program from scratch. In the next section, we will talk about additional considerations you should make to help take your program to the next level.

CHAPTER

# 01



Identify Key Stakeholders' Concerns



This step is probably the most important step we will list in the entire toolkit. Don't assume that you know what your stakeholders concerns are!

Even if you have been at the organization a long time or you have special insight into the leadership team, it is important to take time to identify ALL of your key stakeholders and actually ask them about their goals for the company and its corporate citizenship.

Key stakeholders vary for each and every company, but it is pretty safe to say that the leadership team and all employees should be represented in this group. Above and beyond that, consider asking for some time to speak with the board of directors, polling your consumers, any professional, or union organizations that have a strong relationship within the company, and environmental groups as well.

**When planning the questions you want to ask your stakeholders, consider some introductory topics like:**

- .....
- ✓ *What information do I absolutely need to provide to proceed with planning my CSR program?*  
.....
- ✓ *What is unique to our organization that I must take into account when planning my CSR program?*  
.....
- ✓ *What are my end goals for this program?*  
.....
- ✓ *What information do I need (from you as the stakeholder) to accomplish this goal?*  
.....
- ✓ *How can we ensure we get complete executive support and buy-in?*  
.....

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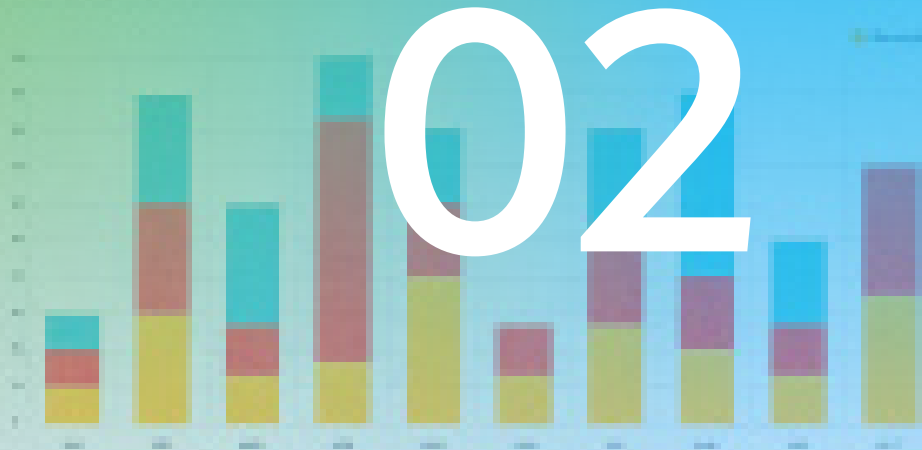
Identify the groups that need to be spoken with and figure out a game plan that works with your company's culture to get true, honest answers.

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CHAPTER

# 02

Old Company



Newer Series



Analyzing Your Past  
Company and Program Data

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Analyzing past company and CSR data is key to launching a new corporate citizenship strategy. The data shows actual numbers and proof of employee interests, trends, and cause areas.

### **If you are lucky enough, good software can make gathering this data easy.**

If you don't have a CSR technology (or spreadsheets) in place and you are truly starting from scratch, this data may be a little more difficult to come by. Take a grass roots approach and look for any data at all, such as recent fundraisers held any volunteer events that were put together. Try to find as many small examples as you can and compile them to understand the bigger picture of how people are making a difference.

Another great option to consider is using external data to benchmark your new program. Understanding trends based on companies in similar locations, of similar sizes, and/or similar situations (local vs. international) will help you create realistic expectations for the look and potential of your program and engagement data.

Where may you get this data? There are a number of great third-party reports to utilize, including the *YourCause Annual Industry Review*, *CECP's Giving in Numbers*, *Giving Across the Globe*, *Neilsen's Global Sustainability Report*, *Boston College's Center for Corporate Citizenship*, and more local CSR groups.

### **MAKE IT APPLICABLE TO YOUR EMPLOYEES.**

It's important to consider this data with respect to the employee surveys you collected earlier. The data will reveal if your employees are consistent in their reporting. For instance, if you find that 37% of your company donates to causes related to youth, mentoring, and education, but the survey you received back only had 5% of respondents mentioning those causes, your data may be skewed!

Data is your best friend throughout this process, especially if it points you in any direction that goes against what your executives or any other stakeholders expressed. Leaning on data as you present your strategy will make most objections futile. Most executives will rely on the sentiment of their employees to inform their decisions about a company-wide citizenship strategy.

#### ***Did you know?***

- ▶ Many platforms offer free ad-hoc reports to help you continue to evaluate your program's performance in alignment with your company goals. These reports break down data by specific geography, engagement rates, nonprofit selections, and even SDGs. Using this data as both a benchmark and ongoing resource will help you identify trends and set goals for the long-term health of your CSR program.

# CHAPTER 03

## Building a Corporate Strategy and Program Structure

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Now that your stakeholders have been identified, you have learned their biggest concerns and how you can address them in your upcoming CSR plan with data, it's time to start developing your strategy.

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Aligning your CSR strategy with your company's corporate strategy will help you speak your executive team's language, and it will help them to understand the importance of ongoing, strategic socially responsible efforts.

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Step one in understanding your corporate strategy is identifying and understanding stakeholder needs. Good thing you've already done that! Remember that understanding the (sometimes) conflicting desires of stakeholder groups will help give you a bigger understanding of the diversity within your organization and the hard decisions your leaders have to make.

### **At most companies, long-term strategies are made public to employees.**

After all, if your employees don't know what they are working toward, how can they help accomplish the overall goal? So, take a look at the messages, mission statements, and quarterly check-ins you've received from leadership at all-staff meetings, through emails, from your manager, etc. Is the goal to retain employees? Recruit new ones? Maximize revenue? Minimize expenses? Maybe your company is battling a bad case of PR. Whatever the guiding message, consider how your new CSR program can reinforce the overarching strategy that has been encouraged from the top of the organization.

The second action here is to have a true understanding of your company's goals for creating a citizenship program. Goals range from increasing employee engagement, recognizing pure impact, facilitating recruitment, bolstering external perception, and even supporting risk/managing crisis.

Look at where your position and overall corporate social responsibility team falls within the company structure. Do you report to Human Resources? The goal of adding a CSR program to your company probably has something to do with employee engagement and recruitment. In the Marketing Department? Your leadership may be looking for a way to help build reputation or manage potential risk.

The third necessary action is to begin with the end in mind. Take the time to think about what data you would like to have reported on one year from now. Based on the primary goals of your stakeholders, consider the following questions:

- What is your company's goal in creating a CSR program?
- What is your company's biggest short-term goal?
- What is your company's biggest long-term goal?

- What will your executive team expect to see at the end of this fiscal year?
- What outcomes do you want to see internally that employees will be excited to achieve?
- What external outcomes would you like to see from your new CSR program?
- Will you need to fill out any external indices or surveys, such as GRI or HRC corporate equality index?
- What data will you need to have on-hand to successfully fill out those surveys?
- What are the most common themes that you see in our corporate strategy, your stakeholder responses, and your existing data?
- Are there any opportunities for shared value that your company may consider getting involved in?

Shared value is usually most obvious in product-based companies, but it can be possible in service industries as well.

## THE IDEA OF SHARED VALUE

Shared value occurs when your company benefits and society benefits as well. An example is manufacturing and selling a soap that helps prevent disease in a third world country. Basically, still make a profit while also making an impact. This tends to be the gold standard in CSR programs- finding a way to directly impact the financial bottom line, while also impacting the community.

Once you've identified the overarching corporate strategy and understood your organization's motivations for engaging in CSR, find correlations between corporate strategy, goals, stakeholder interviews, and past data. The intersection of these data points should give you a strong indication of the cause areas and focus of your organization's CSR program.

While it may be the most difficult step, aligning your data, survey answers, strategy, and creating shared value offers the most opportunity for your organization, your employees, and more. Positioning your CSR this way means that it will be much easier to make the business case and continue to ask for resources over time, while receiving greater buy-in overall.

The structure of your CSR program is key to its ongoing success.

Having a base upon which you and your team can build will allow your program to stay organized, true to strategy and goals, create increased impact, and help better tell your organization's CSR story internally and externally.

CSR programs vary wildly from company to company, but there are a few consistencies to consider. Choosing the right structure for your CSR program is the chance for your culture and organization's unique voice to shine.

A few consistent areas of consideration fall under corporate giving, employee giving, and employee volunteering which we've outlined some questions to help get you started below:

### **Did you know?**

► Some platforms allow you to turn off or on features, like giving, volunteering, grants, etc, free of charge. This gives you the flexibility to start small and have your CSR technology grow with your program over time.

## EMPLOYEE GIVING

- How will employees be able to give back in their communities/world-wide?
- Will they be able to give year-round? During a campaign at a certain time of the year? Both?
- What type of nonprofits will you allow your employees to give to?
- What policies will you have surrounding solicitation and employee fundraisers?

## CORPORATE GIVING

- What is the corporate budget with which you will give back?
- How will you choose who receives these gifts? Past nonprofit partners or grant applications?
- Will you match your employees' donations?
- Are employees eligible to receive employee assistance through some form of corporate budget?
- Do you need to set up a charitable foundation to manage any of these processes?
- Will you have volunteer incentives? (i.e. 10 hours of volunteer time yields a grant of \$100)

## VOLUNTEERING

- How will employees become aware of volunteer opportunities?
- Will you have a company-wide day of service?
- What will your VTO (volunteer time off) policy look like?
- How many hours would you reasonably like them to volunteer during work time?
- How will employees be able to apply for company support (volunteer incentives)?

## CAUSE AREAS

- Will your company identify a certain number of pillar causes?
- What cause areas will you focus on? Will you focus on specific causes at all?
- How will you determine and measure impact?
- How much emphasis will you place on employee interests and passions?

## OTHER ASPECTS TO CONSIDER

### **Diversity and Inclusion**

What does your employee resource group strategy look like currently? Do you need to build one?

### **Shared Value**

How important is it for your company to integrate doing good into doing business?

### **Culture**

What unique aspects of your company can you leverage to create a unique and engaging CSR program?

### **Company Size**

Will you need CSR ambassadors to help you rally the troops?

### **Sustainable Development Goals**

### **Nonprofit Partners**

## EMPLOYEE PARTICIPATION

Employee participation in your programs is essential for success. And no, we don't just mean the typical engagement measurements that focus on how many employees showed up to your latest company-planned event.

Take a look at how employees may actively participate in the entire citizenship process. As long as you don't set up a NO SOLICITATION POLICY, the input of your employees will only strengthen and engage those that might not have otherwise been encouraged to do so by a corporate-sponsored project.

In order to understand if employees have truly bought in to the new culture that you have introduced with your program, consider ways that your employees could organize their own engagement opportunities to get involved and give back. They can be on-site or off-site volunteer events, or even fundraising for a cause they are passionate about, but seeing how willing your employees are to take engagement into their own hands will show you how much the strategy is rubbing off.



CHAPTER

# 04

Identifying the Right  
Nonprofit Partners for  
Your Program

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RUN LIKE AINE  
WE ARE ROAD RUNNER  
Volunteer  
team



## Finding the right nonprofit partner is a process that looks different for every company.

You may look for nonprofit partners that assist your overall CSR, corporate giving, corporate volunteering, or grant awarding strategies. There are a number of factors that affect what type of nonprofit partner you're looking for, as well as how you might structure that partnership.

As we proceed with this discussion, remember that we're referring to a more formal partnership between your company and a nonprofit in this section. This is different than the parameters you might consider for employee giving opportunities. Consider the following questions when you are ready to begin considering nonprofit partners:

### PROGRAM STRUCTURE

- Would it make the most sense for your company to partner with one singular nonprofit or a few different ones? Or possibly a rotation where you focus on one nonprofit a quarter, a month, etc.?
- When making these kinds of decisions, keep in mind your resources, the budget you have to give to nonprofit partners, the amount of time you can reasonably expect employees to volunteer throughout the year, and how many events you might need to organize to fulfill a partnership.
- How many themes or areas of focus do you have in mind?
- Do each of those need a separate nonprofit to support them?
- What about your shared value efforts?
- How will you bring those to market in an effective way and do you need a nonprofit partner to do it?

Finally, there's another cultural consideration- do you need to consider nonprofits that operate locally, nationally, and/or internationally? There are preconceived ideas about larger, national nonprofits, so many people tend to prefer to give to local nonprofits over instead. If you are a one-office company, a local nonprofit might be the perfect match. But, if your company has many offices across the country (or the world), a larger nonprofit may afford partnerships in ways that engage all of your employees, everywhere.

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It is important to note, that most successful programs build true partnerships with nonprofit partners, engaging in multi-year commitments that create impact that spans years, communities, and employees.

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## Additional Considerations

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This section of the toolkit focuses on key areas related to corporate social responsibility, however they are not core to any one CSR program. The need to take on additional considerations depends on your organization's size, structure, number of locations, diversity needs, culture, and many other factors. There may be additional considerations beyond the four that we dive into in the toolkit; these are just the four areas we are asked about most often.

Again, these are not necessary for a successful corporate citizenship program and you may not require them at all. But, if your organization is interested in implementing these ideas, keep reading to learn more!



CHAPTER  
05

Role of a True  
CSR Ambassador

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Companies that have multiple office locations or even one very large office might need to consider having CSR ambassadors in place. These are passionate individuals who can help drive social action.

**Ambassadors are the heart and soul of a successful CSR program.**



### ROLE OF AN AMBASSADOR

CSR ambassadors play a crucial role in the success of CSR programs across all departments, office locations, country borders, and cultures. CSR ambassadors champion your company's CSR initiatives locally, aid in communication, provide feedback to the CSR team and understand how to best implement each initiative so it is successful in their location.



### IDENTIFYING LOCAL AMBASSADORS

It is important that members of this group recognize that although CSR tasks are not a key part of their job description, they are a responsibility. This role should be a great (and fun) leadership or growth opportunity for employees but should also be taken seriously. Using an application system can signal to potential members that if they join this team, they should be ready for what is asked of them.

It would also be prudent to have executive buy-in to this process. They need to be on board because you'll be taking employees' time and adding additional responsibilities.



### ALIGNMENT OF LOCAL INITIATIVES TO OVERALL COMPANY CSR

CSR ambassadors might have the ability to personalize their local citizenship initiatives. When doing this, it is important to align local programs to the specific pillars of social impact they focus on. These social goals help concentrate the efforts of the company and its employees to achieve the greatest impact. It's an ambassador's role to align giving, volunteering, or sustainability efforts with the company's overall CSR goals while making it work best for their local office and its employees.



## ROLES AND RESPONSIBILITIES TO CONSIDER



### Communication

How and when you communicate the program details to employees is among the biggest determinants of your program and campaign's success. Our clients who are proactive about promoting their initiatives achieve far greater results by leaning on their network of ambassadors to help spread key information to each office location.



### Champions

Ambassadors should be champions of your CSR program, knowing every detail of upcoming events, how employees can give back with CSR software and being points of contact for all burning questions. These folks will be able to help rally the troops to increase engagement.



### Representatives

This group should be the best collection of your employee base that you can find, representing diverse opinions, teams, locations, backgrounds, and more. When you're strategically building your CSR plan for the year, you can survey your ambassadors and understand all employees' priorities and how to implement them in the way that's best for your company.



CHAPTER

# 06

Incorporating the United  
Nation's Sustainable  
Development Goals

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All CSR practitioners should be aware of the 17 Global Goals proposed by the United Nations in an attempt to transform our entire world for good by 2030.

**They address issues like poverty, hunger, homelessness, education and health, and they ask governments, corporations, and citizens around the world to step up and make a measurable impact.**

Corporations take different approaches to integrate the SDGs into their CSR strategy. Some don't have the capacity to truly integrate and measure the SDGs, identify any or mention their company's impact on them in their end of year report.

Other corporations are a little more attached to the SDGs, announcing the SDGs their CSR program impact and even sharing impact data based on the targets that each SDG has.

There are a few considerations when wanting to align your CSR program to the SDGs. Consider the goals of your program and if the goal is employee engagement, activism or any number of things that might now align well with the SDGs, then it is 100% okay not to go down the Global Goals path. If your program is built around creating maximum and measurable impact, then aligning with the SDGs may be just for you!

## Mapping to the SDGs

When beginning to assess your program's alignment, we recommend laying out all of SDGs in front of you like a map. Take a look at each of the 17 SDGs and eliminate all of the Global Goals that don't match one of your CSR programs goals.

This should leave you with a pretty good amount of SDGs left to keep mapping. Go deeper into each Global Goal, aligning the strategies of your CSR program with the listed targets of the remaining Global Goals. Eliminate all of the Global Goals that do not have targets that your CSR program will have measurable impact upon.

You will be left with your core Global Goals. While many of us feel like our programs could impact many, if not all, of the SDGs, it is important to realize that we map to the Global Goals to find measurable impact and providing actionable progress in a few areas is better than nothing.

### ***Did you know?***

- CSR technology can facilitate the identification of nonprofits and their corresponding SDGs through finding nonprofits that support specific Global Goals. They can even track impact reporting by each specific SDG to show immediate and complete impact.





CHAPTER

# 07

Disaster Response and  
Relief Strategy

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We live in a world where natural disasters seem more frequent, deadly, and costly than ever before.

**Operating without a disaster relief strategy can leave a company in a tough situation if a disaster occurs close to an office, crucial supply lines, or loyal customers.**

When considering types of disaster relief strategies, there are a few options to compare. Be aware; your company should have a disaster response plan in place if a disaster occurs and threatens your employees, core business, or integral processes. This planning would typically occur outside of the CSR office, but it is of pivotal importance. As a CSR practitioner, you must be aware of your company's disaster strategy to know how and when you will be able to begin the relief process. Again, you are (most likely) not responsible for planning or implementing this process, but still should be aware of it and included in future updates and meetings.

The first relief plan your team can implement is corporate disaster response. This means creating a company disaster relief budget and strategy. This strategy will differ depending on whether the disaster affects employees (and is close to headquarters or an office branch) or the disaster occurs farther from home. Employee donations collected throughout the year specifically designated for disaster response are used in this strategy and heavy volunteer time.

For this disaster response, it is important to have your plan in place before anything happens. Earmark necessary funds for disaster relief, prepare employees to be ready to volunteer and potentially deploy to disaster sites. Even choose a nonprofit organization to partner with throughout the relief effort. Understanding how you will work with that nonprofit before the disaster strikes means a more timely response across the board.

A second type of disaster relief occurs when disaster strikes close to home. This disaster would affect your employees, possibly putting them in the position of needing employee relief. In this type of strategy, you can set up an employee relief fund (ERF) in order to facilitate the relief of affected employees and help restore their health and home. The laws surrounding ERFs can be complicated (for instance, corporate foundations can only provide relief to employees who are victims of qualified disasters). To simplify the process, there are expert organizations that can help guide your company through the process of creating an employee relief fund.

**Regardless of which strategy you choose, the most important part of disaster relief is preparation.**

ERFs and disaster response strategies cannot be created overnight and the expertise and partners needed to have these opportunities won't be available after a disaster strikes.

If you think disaster response should be a key component of your CSR strategy, the time to set it up is now.



The background of the entire page is a photograph of a wall covered in numerous small, colorful national flags. The flags are arranged in a grid-like pattern, each mounted on a small black square. The wall itself is a light, neutral color. A soft gradient overlay transitions from a bright green on the left side to a deep blue on the right side, creating a modern, global aesthetic.

CHAPTER  
08

Global Considerations

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Global companies have specific considerations when it comes to corporate social responsibility.

**Global companies have a broader population of employees, more diverse cultures and different ideas of what it means to be philanthropically responsible.**

### **Culture**

Different countries have different understandings of philanthropy and who should be responsible for taking care of social issues locally and globally. For instance, in some countries, the government is solely responsible for creating programs. The key is to know what the culture is in each country you have employees in so your program can adapt and mesh to fit each and every employee.

### **Barriers**

You may stumble upon a few language barriers within your corporation. With thousands of languages spoken throughout the world, this is a very common setback. Understand the preferred languages within each location and make sure your message is either translated or you have someone that will translate it for you into the appropriate tongue. It is important that these messages come across in the way they were intended, no matter the language they're heard in. Relying on ambassadors to ensure that the translation is made successfully can mitigate that risk. If you really want your global employees to know you have taken them into consideration, converting things such as time zones, currencies and miles into kilometers is a thoughtful way of relating to their world.

### **International Interests**

When working on a global-scale CSR program, you will also have to consider the interests of your international employees. If it is important that all employees in your company, regardless of location, engage with the same focus area that your organization has chosen to highlight, those may not match the interests or causes of available and global vetted nonprofits in your employees areas. Completing proper vetting and research ensures opportunities are available before asking your employees to engage.

### **Launch Considerations**

A common question asked by global organizations is should we launch one location at a time, the whole company together, etc.? And the answer to that is every company differs, however many have found that the benefits of a tiered launch mean that you can work out the kinks on a smaller scale, finalize messaging and ensure the program is well received before rolling it out globally.

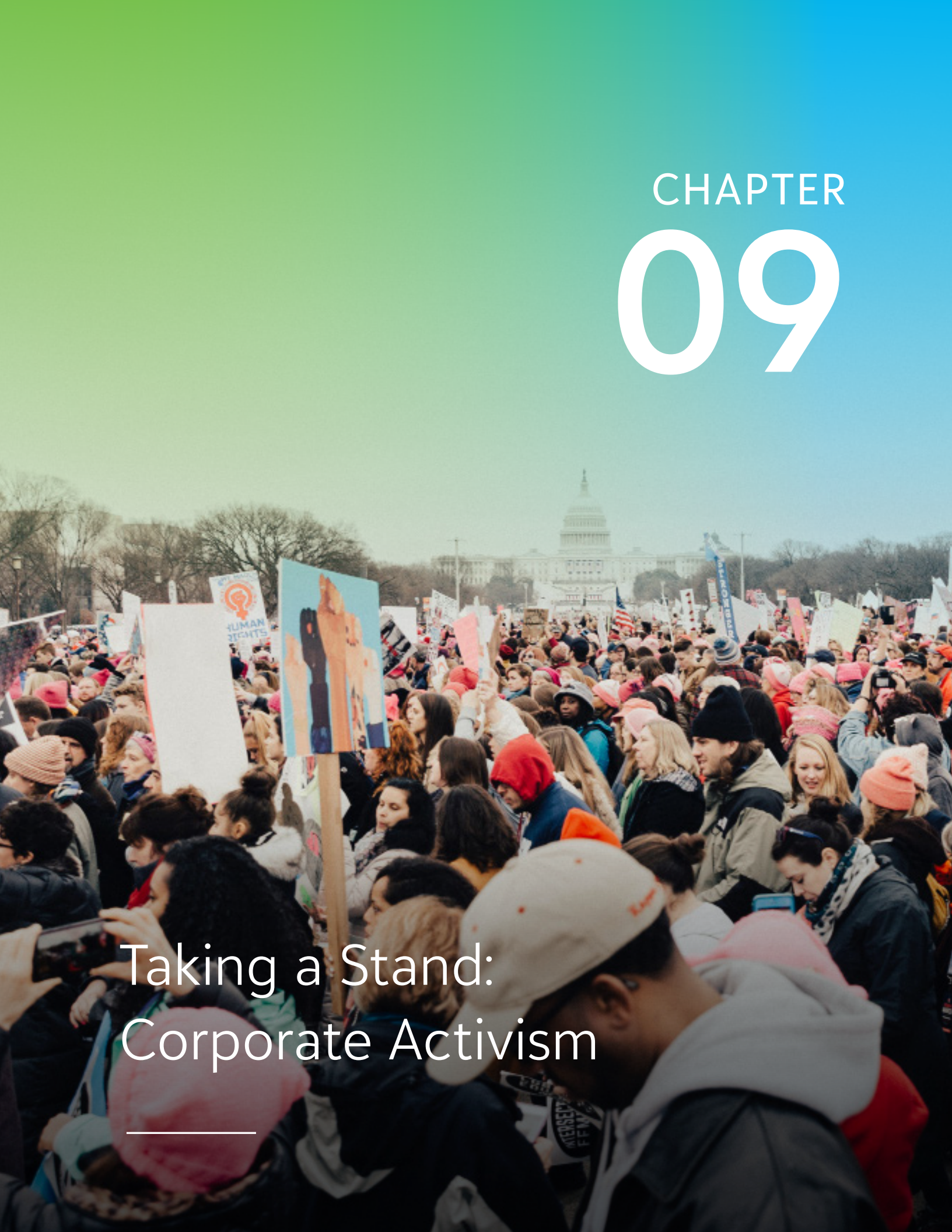
Don't let the span of a global program keep you from moving forward with your overall CSR strategy.



# CHAPTER 09

## Taking a Stand: Corporate Activism

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In today's unpredictable world, corporate activism is becoming more acceptable and expected than ever before.

## **The tables have turned on the expectations of corporations and their leaders.**

The reality is the role of the corporate responsibility professional has changed drastically in the past year alone because of defining events. Before 2017, many CSR programs would have continued as planned without altering their strategy to uniquely focus on natural disasters or socio-political topics.

We might not have even included this section one year ago, but now, it is impossible to consider activism as part of your organizations corporate citizenship. When deciding on whether to add activism to your CSR strategy, it is important to consider your company's comfort level with activism as a whole. Does your company feel comfortable speaking out on social topics? Is your CEO vocal about socio-political initiatives?

It's important to give CSR the credit it deserves. Corporate activism is a culmination of the evolution of social responsibility as a business function aligned with corporate strategy, efficiencies, and most notably, values. Every brand has a core set of values and is expected to act and uphold those values by the people that consume their products.

As brands continue this process of activism, they will begin to recognize that it is an opportunity for differentiation and a tool to be harnessed, giving corporations a vantage point in their markets and allowing employees to engage with purpose on an entirely different level than ever before.

## **So you've decided to become an activist.**

When thinking when and how your company would feel most comfortable activating around what they believe in, consider authenticity. Also consider the level at which you will react, whether it's creating a conversation, taking a stand, or making a scene for your cause.

The key to successful activism is to respond authentically to whatever issue resonates with your company's culture, operations or brand. Your authenticity is established through the level of activism that you respond with, as well as the communication you choose to articulate your decision.

### **Starting a Conversation**

The first level of activism is simply recognizing an issue and beginning the conversation. Companies like Nike have a long history of beginning conversations surrounding gender inequality, utilizing sports campaigns to express strength in women. This step of starting a conversation allows brands to engage at a level in which they feel comfortable, but also connect their brand to consumers that believe in that cause.

### **Taking a Stand**

Taking a stand is certainly a higher risk than simply starting a conversation. A great example would be CVS, who took a stand by ceasing to sell tobacco-related products in their stores. It continued

its pursuit of activism by only displaying non-digitally altered photographs in its stores and online to help create a healthier and more realistic environment for young men and women. When a brand risks upsetting a large portion of the population, let's say the population that enjoys using tobacco products, to take a stand, there is a chance that your organization may alienate potential consumers by the side chosen, but if you know your audience, they should more strongly identify with your brand than ever before.

### Causing a Scene

Lastly, brands can choose to make a scene. Earlier this year, UNICEF went to the extreme and parked 27 buses in the streets of New York City, effectively stopping traffic to advocate for the 27 million students currently missing school due to war and conflict. When a brand chooses to make a scene, it is an elevation in commitment. Not only has the brand taken a stand, but it has blasted that stand out for the world to see. Certainly this can be risky. When a brand risks upsetting a large part of the population, they can face criticism from many areas of the population. But if it is acting from a place of authenticity and in accordance with the brand's values, its target audience will likely be supportive of the message and become more loyal as a result.

If your company has yet to engage with CSR through the lens of activism and you're wondering where to start, consider:

- ✓ *Establishing your company's values. No matter what, activism must be authentic and values-driven.*
- ✓ *Building on the values that run so deeply that key stakeholders, employees, and consumers would expect action from the company.*
- ✓ *Measuring the level of response your company would be comfortable with and your consumers would view as an authentic response.*
- ✓ *Monitoring the news for events in that space, whether its environmental, political, or social.*



A group of approximately 12 young women are sitting in a circle on a green lawn. They are dressed in casual attire, including t-shirts, blouses, and jeans. One woman in the center is wearing a blue hat. In the background, there is a white, modern-style building with a tiled roof and several tall palm trees. The sky is clear and blue. The overall scene is bright and sunny.

CHAPTER

# 10

Creating an Employee  
Resource Group

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One of the most powerful ways to engage employees is to allow them to self-identify through an employee resource group.

These groups are a safe space to recount shared experiences, to learn together, and to advance professional development in a more personalized way.

There's a lot to remember as you work with employees to create employee resource groups (ERG), and we've outlined it all in detail below. These details are great for starting new ERGs but can also be applied to refresh existing ERGs when transitioning leadership.



## WHAT IS AN ERG?

Employee resource groups are groups of employees with shared interests who come together to support each other and learn from one another. ERGs are often a place where professional and personal development, support, information sharing, community outreach, networking, recruiting, and shared experiences are found. These groups are a safe space for those who self-identify to find support, but they are also a place where allies of that group can show and find support as well.

Keep in mind that an ERGs primary goal is to add value to the individual involved but also add value to the organization. ERGs support a company's vision, mission, values, and strategy. They help companies build strong links to the local community, support professional development that strengthen employee skills, and aid in on-boarding, recruitment, and retention of employees as well.

Starting an ERG is similar to starting any business or organization. These groups are meant to be more than just a group of friends who go to lunch and chat about shared experiences. They're meant to be a source of safety, learning, and inclusion. So how can you be sure to cover all the bases? Check in with HR. HR will likely be able to tell you if a similar ERG exists and then they will be able to guide you through the process of approving and activating a new ERG.



## LEADERSHIP

### Identify the best leader.

If you're wanting to start an ERG about diversity, it might be germane to identify a group leader who self-identifies as a member of the minority population the ERG is being founded upon. A strong leader should be credible, professional, and passionate. They should have awareness of diversity and inclusion competencies and should be willing to complete training to enhance these abilities as they lead the new ERG.

### Create a leadership committee.

There is strength in numbers and a successful ERG cannot rest on the shoulders of just one person.

Identify a group of founding officers, subcommittee members, and any other leadership needed to support the group.

### Identify an executive sponsor.

The executive sponsor serves as a champion of the ERG and can help connect the ERG to upper management. In this way, they stay aware of the business goals of the organization and how the ERG supports those goals. Sponsors can also provide guidance on the appropriate requests for information and who that information comes from. Some organizations encourage executive sponsors who are NOT members of the specific group to encourage the idea that ERGs are open to all and that they do not discriminate.



## FOUNDING PRINCIPLES

### **Have a mission.**

Having a well-defined mission shapes the future of the ERG. Does your mission include different aspects such as creating community, having a safe space for open discussion, advancing awareness within your group, creating professional development opportunities for the members, etc?

### **Create goals.**

Having SMART goals surrounding your new ERG will help strengthen the company's support of your group. These goals might be about the number of members, how engaged these members are, participation in a mentoring program, or the culmination of a specific annual project. Regardless of the goals, understand how success will look for your specific ERG before starting the process.

### **Create a charter.**

A charter is simply a document that takes all the information you've created, puts it in one place and serves as a resource that guides the group forward. Charters often consist of the ERG name, the mission, membership eligibility, structure, operations, etc. It is a shared document that future ERG leaders and all members can refer to ensure that the ERG is staying true to its original targets.



## LOGISTICS

### **Design your messaging.**

Internal messaging is the key to a successful ERG launch. Be sure to include details about the ERG, its mission, goals, and an invitation to the inaugural meeting. Remember that ERGs might have a target audience in mind, but they are open to everyone. Be sure to use inclusive language in your messaging.

### **Host your inaugural meeting.**

At this meeting, it is important to reiterate the mission, goals, and objectives of the new ERG. It is also

important to gain buy-in from your target audience. Without their buy-in, the group wouldn't exist. Be sure to talk about details like expected time commitments, whether goals might change after feedback from the group, and any ideas the broader group has that support the overall goals of the ERG and your organization.

### **Decide on membership.**

Because ERGs are typically open by company policies to any employee who wishes to participate, it can be difficult to know who has opted in. Let the company know how to become an official member of the ERG. A great way to do this is to create a group through your engagement platform and have members sign up to receive updates.



## THINGS TO KEEP IN MIND

### **Partnership**

Many times, your company will have more than one ERG. Think of how your new group can work together with other groups to further support the goals of the organization and reduce pressure on your employees.

### **Know your policies.**

Be sure to look at your company's handbook as it relates to internal groups. Many have guidelines on internal communications, when groups can meet (typically outside of business hours or at lunch), and how frequently.

### **Ways to educate.**

It is important that leaders of ERGs seek out diversity and inclusion training to ensure that they are equipped to lead these groups. Another component of education would be educating your company about the ERG and how the ERG is actively supporting the goals of your organization. Always seek out new ways to teach employees about your group's efforts and mission.

A diverse group of five smiling people (three men and two women) standing together against a green and blue gradient background. They are dressed in casual attire like t-shirts, blouses, and jeans. The overall mood is positive and inclusive.

CHAPTER

# 11

Immersing Diversity and  
Inclusion within your  
Programs and Company

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While diversity and inclusion has been around for many years, its link to CSR seems to be stronger than ever in recent years.

## **Diversity and inclusion strategies create a fully engaged group of employees and a company-wide culture that people want to be a part of.**

These strategies are about creating a workplace where everyone feels encouraged to bring their whole selves to work, where uniqueness is recognized and valued, and where advancements are based on an individual's accomplishments.

When considering diversity and inclusion in your CSR program, note that there are a few ways to go about it. The first is to build diversity and inclusion into your current CSR program. This means your CSR practitioner would be responsible for building out this strategy. The second is to work with HR create the strategy. The third is to recognize diversity and inclusion as its own field with dedicated resources. All three a great options, just dependent upon company size, reasons for engagement in CSR, and of course, budget.



### **EDUCATE.**

Everyone has a different understanding of what diversity and inclusion means to them, depending on their experience, expertise and personal history. The first step to creating a diversity and inclusion strategy is ensuring that all key stakeholders receive the same training, so that the groups is speaking the same language and can identify common goals.



### **IDENTIFY THE NEED.**

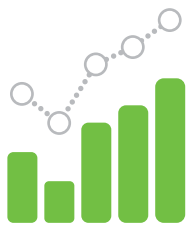
Policies can affect HR hiring practices, managers, employees, executive leadership, and more. diversity and inclusion can even mean taking a hard look at the data and getting the right people in a room to address any weak points in your company's current plan. As always, it's important to link this conversation back to overall business objectives, just like our CSR discussion. Understanding what your company needs to do to better serve its employees, customers, and community is key to success.



### **CREATE GROUPS FOR SUPPORT.**

One key set of programs for diversity and inclusion is employee resource groups (ERGs), affinity groups, and business resource groups, which we touched on previously. Creating online groups can offer your employees a way to easily find and sign up for events and even share group documents and photos unique to them.





## IDENTIFY AND TRACK THE DATA.

As your program progresses, it's important to create a system to identify and report on any data diversity and inclusion data found. This means establishing who needs to report in, on what timeline, and on which KPIs. KPIs may include the breakdown of diversity in your employee base and leadership, dollars spent on diversity training, documentation of activities, and more.

- ✓ *Does your company already have diversity and inclusion efforts? If yes, have you met with that team to understand the goals, KPIs, and see if their work could overlap with any CSR initiatives?*
- ✓ *If your company doesn't have diversity and inclusion, how will adding one help your company's culture the most?*
- ✓ *Try to meet with your HR team. See if they have some ideas for training or goals. Based on bandwidth, stakeholders' opinions, and what works best for your corporation's structure, decide on who will take leadership of the diversity and inclusion strategy.*
- ✓ *Work together to establish KPIs, goals, relevant reporting information, and more.*

