



ERG Toolkit

Practical templates for building, governing, communicating, and connecting Employee Resource Groups

Developed by the Nicsa ERG Impact Committee

A customizable resource for organizations establishing, refreshing, or strengthening ERGs. Adapt each section to your organization's governance structure, maturity, culture, policies, and approval processes.



How to Use This Toolkit

This toolkit brings six companion resources into one practical guide. Use the sections independently or together. Replace bracketed placeholders, remove provisions that do not apply, and align the templates to your organization's existing policies and processes.

Section	Resource
1	Bylaws
2	Role Descriptions
3	Cadence Templates
4	Communications Pack
5	Budget & Event Planning
6	Business Linkage Tracker
7	ERG Measurement Framework

This toolkit is a customizable resource and is not legal advice. Organizations should review it against their own policies, governance requirements, and applicable law before use.

01

Bylaws

A customizable governance framework for ERGs.

Article I. Name, Purpose, and Scope

Section 1.01 Name

Sample provision: The name of this Employee Resource Group shall be [INSERT ERG NAME] (the “ERG”).

Section 1.02 Purpose of These Bylaws

Sample provision: These bylaws establish the governance framework, membership expectations, leadership structure, operating procedures, and amendment process for the ERG.

Section 1.03 ERG Purpose

Sample provision: The purpose of the ERG is to foster an inclusive workplace by supporting employee connection, professional development, leadership opportunities, community engagement, education, and business alignment relating to [INSERT ERG FOCUS AREA].

Section 1.04 Relationship to the Organization

Sample provision: The ERG operates within [INSERT ORGANIZATION NAME] and is subject to all applicable organizational policies, including policies relating to employment, conduct, confidentiality, communications, events, use of funds, conflicts of interest, data privacy, accessibility, and external engagement.

Article II. Mission, Vision, and Objectives

Section 2.01 Mission

Sample provision: The mission of [INSERT ERG NAME] is to create opportunities for employees and allies to connect, learn, grow, and contribute to a more inclusive and engaged workplace.

Section 2.02 Vision

Sample provision: [INSERT ERG NAME] seeks to help create a workplace where employees feel valued, connected, supported, and empowered to contribute fully to the success of [INSERT ORGANIZATION NAME].

Section 2.03 Objectives

- The ERG may pursue the following objectives, as applicable:
- Foster employee engagement, belonging, and connection.
- Provide networking, mentoring, sponsorship, or professional development opportunities.
- Promote awareness, education, and dialogue related to [INSERT ERG FOCUS AREA].
- Support recruiting, retention, talent development, or leadership-pipeline objectives, where appropriate.
- Create opportunities for community involvement, volunteerism, or external engagement consistent with organizational policies.
- Partner with business leaders, HR, DEI, talent, learning, communications, or other stakeholders to align ERG activities with organizational priorities.
- Develop practical resources, templates, events, or programs that can be shared with members and stakeholders.

Article III. Membership and Participation

Section 3.01 Eligibility

Sample provision: Membership and participation in the ERG shall be open to all employees of [INSERT ORGANIZATION NAME] Membership, leadership opportunities, and participation in ERG activities shall be open to all employees regardless of personal background, identity, or affiliation. ERGs may focus on specific communities or experiences while remaining inclusive and accessible to all employees and allies.

Section 3.02 Membership and Participation Models

Option A - Open participation: Employees may participate in ERG activities without formal enrollment, except where registration is required for events or communications.

Option B - Membership list: Employees may join the National/International ERG by completing [INSERT MEMBERSHIP FORM / DISTRIBUTION LIST / PLATFORM SIGN-UP]. Participation may be tracked through centralized ERG membership records, chapter-specific rosters, event participation data, or other approved methods.

Option C - Chapter model: Employees may join the ERG at the local, regional, business-unit, or virtual chapter of the ERG by completing [INSERT MEMBERSHIP FORM / DISTRIBUTION LIST / PLATFORM SIGN-UP]. Enrolling at the Chapter level automatically enrolls members at the National/International level. Chapter level participation may be tracked through centralized ERG membership records, chapter-specific rosters, event participation data, or other approved methods.

For option B & C, members can automatically be enrolled upon filling out the membership form OR membership can be contingent on approval by the National/International ERG leadership team (option B) or Chapter level leadership team (option C). Contingent membership approval may help with membership monitoring but can deter or slow membership enrollment.

Section 3.03 Active Member

Sample provision: An Active Member is an employee who participates in at least [INSERT EXPECTATION, SUCH AS ONE MEETING, EVENT, WORKSTREAM, OR VOLUNTEER ACTIVITY] during the ERG year.

Section 3.04 Member Expectations

- Act consistently with the ERG mission and organizational values.
- Participate respectfully and inclusively.
- Protect confidential, proprietary, personal, or restricted information.
- Comply with policies on communications, events, technology, harassment, discrimination, privacy, and conflicts of interest.
- Use ERG platforms and resources for ERG-related purposes.
- [insert link to Employee Code of Conduct Policy (if it exists)]

Section 3.05 Ending Membership

Sample provision: Participation may end if an individual ceases to be eligible, voluntarily withdraws, or is removed from ERG participation in accordance with applicable organizational policies.

Section 3.06 Membership Platform and Process

Sample provision: The ERG shall maintain a documented process for adding, updating, and removing members through [INSERT MEMBERSHIP PLATFORM / DISTRIBUTION LIST / HR SYSTEM / COLLABORATION TOOL]. The process should identify who owns the membership list, how employees may request to join or leave, how chapter or subgroup participation is tracked, and how membership information is reviewed for accuracy in accordance with applicable privacy and records requirements.

Guidance notes: The process can be brief, but it should be clear enough to support continuity when ERG leaders' transition. Organizations may use an existing HR, DEI, intranet, distribution-list, or collaboration-platform process rather than creating a new system.

Article IV. Governance and Leadership Structure

Section 4.01 Governance Model

The ERG should select a governance model suited to its size, maturity, and organizational requirements. The model selected here should be reconciled with the role descriptions in Section 2, Role Descriptions and any companion ERG toolkit resources so that role names, responsibilities, leadership selection methods, and approval workflows are consistent across documents.

Section 4.02 Executive Sponsor

Sample provision: The Executive Sponsor shall serve as a senior leadership advocate for the ERG, provide strategic guidance, help connect the ERG to organizational priorities, and support visibility for the ERG's work.

Section 4.03 Advisory Board or Steering Committee

Optional provision: The ERG may establish an Advisory Board or Steering Committee composed of [INSERT ROLES OR REPRESENTATIVES] to provide guidance, continuity, governance oversight, and support for ERG priorities.

Section 4.04 ERG Chair / President and Vice Chair / Co-Chair (Optional)

Sample provision: The ERG Chair / President shall lead the ERG, coordinate strategy and annual planning, facilitate meetings, support Program & Function Leads, manage leadership transitions, and coordinate with the Executive Sponsor and HR Partner. The Vice Chair / Co-Chair, if appointed, shall support the ERG Chair / President, provide leadership continuity, and lead cross-functional initiatives as assigned.

Section 4.05 Program & Function Leads

The ERG may appoint or elect Program & Function Leads to manage designated pillars, coordinate with other Program & Function Leads as necessary, and provide updates to the ERG Chair / President. Functional areas may include, but are not limited to, communications, membership and engagement, finance, governance, volunteer coordination, programs, or regional and local chapter coordination, consistent with the roles selected from Section 2, Role Descriptions.

R = Responsible, A = Accountable, C = Consulted, I = Informed

The following companion RACI summarizes ownership for selected activities. Organizations should tailor it to their governance model and approval requirements while keeping role names aligned with Section 2, Role Descriptions.

Section 4.06 Illustrative Leadership Hierarchy

This hierarchy is illustrative rather than mandatory. The selected governance model determines which roles are used. Section 2, Role Descriptions, provides authority and typical time commitments for each role. The HR Partner provides organizational support; the Executive Sponsor provides senior advocacy; the Advisory Board / Steering Committee provides oversight; the ERG Chair / President leads ERG operations; and designated leads and members support delivery. Refer to the companion ERG Role Descriptions resource for authority and typical time commitments.

Section 4.07 RACI for Key Activities

R = Responsible, A = Accountable, C = Consulted, I = Informed

The RACI in Section 2, Role Descriptions, summarizes ownership for selected activities. Organizations should tailor it to their governance model and approval requirements.

Article V. Selection, Succession, and Removal of Leaders

Section 5.01 Leadership Selection

The organization should select one of the following models and delete the others:

Election model: ERG leaders are nominated and elected by Active Members through a process administered by [INSERT ROLE / TEAM].

Appointment model: ERG leaders are appointed by [INSERT EXECUTIVE SPONSOR / HR / DEI TEAM / ERG GOVERNANCE BODY] after considering interest, experience, capacity, and organizational needs.

Hybrid model: Certain roles, such as the ERG Chair / President or Vice Chair / Co-Chair (Optional), are appointed, while Program & Function Leads or Regional or Local Chapter Leads may be elected or selected by the ERG membership.

Incoming leaders should receive documented onboarding materials, access to shared resources, and role-specific training prior to assuming responsibilities.

Section 5.02 Terms

Sample provision: ERG leaders shall serve for [INSERT TERM LENGTH], unless extended, renewed, or shortened in accordance with organizational requirements or ERG needs.

Section 5.03 Nominations

Sample provision: Nominations or expressions of interest shall be submitted to [INSERT ROLE / TEAM] by [INSERT DEADLINE]. Candidates should be members in good standing and should be able to meet the responsibilities of the role.

Section 5.04 Vacancies and Interim Roles

Sample provision: If a leadership position becomes vacant, the ERG may appoint an interim leader or conduct a selection process consistent with these bylaws and applicable organizational procedures.

Section 5.05 Removal or Transition of Leaders

Sample provision: A leader may be removed or transitioned from a role for inability to fulfill responsibilities, resignation, change in eligibility, conflict with policies, or other reason determined appropriate by [INSERT GOVERNANCE BODY / EXECUTIVE SPONSOR / HR / DEI TEAM].

Check	Leadership Transition Checklist
☐	Transfer files
☐	Transfer mailbox access
☐	Update distribution lists
☐	Update SharePoint
☐	Document annual calendar
☐	Introduce successor to stakeholders
☐	Transition budget records

Section 5.06 Leadership Continuity and Succession Planning

Sample provision: To support business continuity and maintain organizational effectiveness, ERGs are encouraged to implement staggered leadership terms whenever feasible. Staggering leadership appointments helps ensure that experienced leaders remain in place while new leaders are onboarded, reducing disruption to ongoing initiatives, partnerships, and annual planning activities.

Where practical:

- No more than approximately 50 percent of the leadership team should transition during the same cycle.
- Chair and Co-Chair positions should have offset term end dates whenever possible.
- Functional and chapter leadership roles should be distributed across multiple appointment cycles.
- Outgoing leaders should participate in transition and onboarding activities for their successors.

This approach supports sustainable leadership development, organizational stability, and successful execution of ERG objectives.

Article VI. Meetings and Operating Procedures

Section 6.01 Meeting Cadence

Sample provision: The ERG shall hold meetings at intervals determined by ERG leadership team, considering membership size, leadership capacity, business needs, and planned activities.

Section 6.02 Agendas and Minutes

Sample provision: Agendas should be prepared before meetings when practicable, and meeting notes or action items should be maintained for leadership meetings and significant ERG decisions.

Section 6.03 Quorum

Formal model: A quorum for member votes shall be [INSERT PERCENTAGE OR NUMBER] of Active Members.

Flexible model: The ERG may operate by consensus and documented leadership approval unless a formal vote is required by these bylaws or organizational policy.

Section 6.04 Decision-Making

Sample provision: The ERG should make decisions by consensus where possible. When a formal decision is required, the decision may be approved by [INSERT METHOD: MAJORITY VOTE / LEADERSHIP TEAM APPROVAL / EXECUTIVE SPONSOR APPROVAL / HR OR DEI APPROVAL].

Article VII. Programs, Events, and Deliverables

Section 7.01 Annual Plan

Sample provision: The ERG leadership team should develop an annual plan that may include goals, events, programs, communications, budget needs, leadership development, member engagement, and business linkage activities.

Section 7.02 Events and Programs

Sample provision: ERG events and programs must comply with applicable organizational requirements for approvals, accessibility, budget, speaker engagement, vendor management, facilities, technology, communications, and participant conduct.

Section 7.03 Deliverables and Resources

Sample provision: The ERG may develop resources such as guides, toolkits, newsletters, event summaries, mentoring materials, discussion guides, or templates, subject to applicable review and approval requirements.

Article VIII. Budget, Funding, and Resources

Section 8.01 Budget

Sample provision: The ERG may request or receive funds through [INSERT ORGANIZATION BUDGET PROCESS]. Any funds shall be used only for approved ERG purposes and in accordance with applicable policies. Organizations may use the ERG Budget Tracker in Section 5 as a budget request template or adapt it to the organization's existing funding request process.

Section 8.02 Spending Approval

Sample provision: No ERG member may commit funds, engage vendors, approve expenses, or represent that the organization has agreed to spend money unless authorized through the applicable approval process.

Section 8.03 Recordkeeping

Sample provision: The Accounting / Finance Lead or other designated owner shall maintain reasonable records of approved budget, expenses, reimbursements, invoices, and financial decisions in accordance with organizational requirements.

Article IX. Communications, Branding, and Records

Section 9.01 Communications

Sample provision: ERG communications shall be coordinated by ERG leadership or the Comms Lead and must comply with applicable communications, branding, accessibility, social media, privacy, and approval requirements.

Guidance notes: For toolkit consistency, the designated communications owner or communications champion should ordinarily be the Comms Lead, or an individual acting under the Comms Lead's direction. The Comms Lead should coordinate with organizational Communications and HR partners when review or approval is required.

[Insert link to communications policy if applicable]

Section 9.02 Use of Branding

Sample provision: Use of the organization's name, logo, trademarks, templates, intranet pages, distribution lists, or social media channels must follow applicable organizational guidelines and approvals.

[insert link to branding policy if applicable]

Section 9.03 Records

Sample provision: The ERG should maintain records of bylaws, leadership rosters, meeting notes, annual plans, approved budgets, significant decisions, and final materials in [INSERT APPROVED LOCATION / SYSTEM].

Article X. Business Linkage and Stakeholder Engagement

Section 10.01 Business Linkage

Sample provision: The ERG should identify opportunities to align its work with relevant organizational priorities, including employee engagement, leadership development, recruiting, retention, learning, community engagement, client or customer engagement, innovation, or market insights, as applicable.

Section 10.02 Internal Stakeholders

- Potential internal stakeholders may include:
- Executive Sponsor
- HR Partner or DEI team
- Talent Acquisition
- Learning and Development
- Comms Lead or organizational Communications team
- Business-unit leaders
- Legal, Compliance, Risk, or Privacy teams
- Community engagement or corporate responsibility teams

Section 10.03 Stakeholder Tracker

Sample provision: The ERG may maintain a stakeholder tracker identifying relevant internal and external stakeholders, purpose of engagement, relationship owner, and follow-up actions.

Article XI. External Engagement and Use of Organization Name

Section 11.01 External Engagement

Sample provision: The ERG may engage with external speakers, nonprofits, professional associations, industry groups, universities, clients, customers, vendors, or community partners only in accordance with applicable approval requirements.

Section 11.02 Authority to Represent the Organization

Sample provision: No ERG member may represent the ERG or [INSERT ORGANIZATION NAME] externally, enter commitments, endorse third parties, solicit funds, or make public statements on behalf of the organization unless authorized to do so.

[insert link to media, solicitation policies if applicable]

Section 11.03 Confidentiality

Sample provision: ERG members shall not disclose confidential, proprietary, privileged, personal, client, customer, vendor, or restricted information through ERG activities or materials unless expressly authorized and appropriate safeguards are in place.

[link to ERG event agreements in appendix]

Article XII. Amendments

Section 12.01 Proposal of Amendments

Sample provision: Any Active Member, ERG leader, Executive Sponsor, or designated organizational partner may propose amendments to these bylaws by submitting the proposed change to [INSERT ROLE / TEAM].

Section 12.02 Review and Notice

Sample provision: Proposed amendments should be circulated for review by [INSERT MEMBERSHIP / LEADERSHIP TEAM / EXECUTIVE SPONSOR / HR OR DEI TEAM] before adoption.

Section 12.03 Approval

Sample provision: Amendments shall become effective upon approval by [INSERT APPROVAL METHOD OR GOVERNANCE BODY] and, if required, review by relevant organizational functions.

Article XIII. Dissolution or Inactive Status

Section 13.01 Dissolution or Pause

Sample provision: The ERG may be dissolved, merged, renamed, paused, or placed into inactive status by [INSERT GOVERNANCE BODY / EXECUTIVE SPONSOR / HR OR DEI TEAM] based on membership interest, leadership capacity, organizational priorities, or other relevant considerations.

Section 13.02 Disposition of Records and Funds

Sample provision: Upon dissolution or inactive status, ERG records, materials, and remaining funds, if any, shall be handled in accordance with organizational policies and direction from [INSERT ROLE / TEAM].

02

Role Descriptions

Clear responsibilities, authority, and typical time commitments for ERG leadership roles.

Role	Primary Purpose	Key Responsibilities	Authority	Typical Time
Executive Sponsor	Provide leadership advocacy and strategic vision; normally a Board or Executive Management member	Champion goals; advocate for funding/resources; remove barriers; promote initiatives; advise leaders	High-level influence and advisory	2–4 hours/month
Advisory Board / Steering Committee	Provide oversight, guidance, and continuity	Review strategy and annual plans; advise on priorities and corporate alignment; monitor outcomes; support succession planning	Approves major strategic initiatives and budget recommendations	Quarterly + ad hoc
ERG Chair / President	Lead the ERG and drive execution of objectives	Develop annual strategy/goals; lead leadership team; manage stakeholder engagement; oversee budget/reporting	Primary operational decision-maker	5–10 hours/month
Vice Chair / Co-Chair (Optional)	Support the Chair and provide leadership continuity	Assist strategic planning/execution; act for Chair when needed; lead cross-functional initiatives	Shared operational authority	5–10 hours/month
Program & Function Lead	Drive ERG operationalization and member engagement/development	Manage designated pillar; coordinate with other leads; provide updates to Chair	Target-scope or event decisions within approved budget	2–6 hours/month
Membership & Engagement Lead	Grow and retain ERG membership	Recruit/onboard members; conduct surveys; track participation; foster inclusive engagement	Membership engagement decisions	2–5 hours/month
Comms Lead	Manage ERG communications and branding	Develop communications strategy; maintain internal channels; promote events/achievements; create content	Communications decisions	2–5 hours/month
Accounting / Finance Lead	Manage ERG finances and budget utilization	Develop annual budget proposal; track expenses; support policy compliance; produce reports	Budget administration within approved limits	2–5 hours/month

Secretary / Governance Lead	Maintain governance and operational discipline	Schedule meetings; record minutes/actions; maintain governance documents; track commitments/deadlines	Administrative governance authority	1–3 hours/month
Volunteer Coordinator	Organize and support volunteers	Recruit volunteers; assign responsibilities; support post-event recognition	Volunteer staffing decisions	1–4 hours/month
Regional or Local Chapter Lead	Extend ERG reach across locations	Execute local programs; coordinate with central leadership; gather feedback; promote participation	Local operational decisions	2–5 hours/month
ERG Members	Participate in and support ERG objectives	Attend events/meetings; provide feedback; volunteer; serve as ambassadors	Influence through participation	Flexible
HR Partner	Provide organizational support and alignment	Advise on policies/compliance; support measurement/reporting; assist funding/logistics; connect initiatives to culture/strategy	Advisory; policy compliance oversight	Ongoing support

RACI for Key Activities

R = Responsible | A = Accountable | C = Consulted | I = Informed

Activity	Executive Sponsor	Advisory Board	ERG Chair	Leadership Team	Members
Annual strategy and plan	C	A	R	R	I
Manage budget	I	I	A	R	I
Organize events	I	I	A	R	C
Membership growth	I	I	A	R	C
Reporting and Updates	I	C	R	R	I

ERG Leadership Team: The Chair, Vice Chair/Co-Chair, Program & Function Leads, Regional/Chapter Leads, and other designated leadership roles Executive Sponsors and HR Partners serve in advisory capacities and are not considered voting members of the Leadership Team unless otherwise specified.

03

Cadence Templates

Ready-to-use monthly and quarterly meeting agendas, with KPI and governance references.

Monthly Agenda

Recommended participants: ERG leadership team and relevant functional leads; HR Partner as needed.

- Review strategic progress
- Membership data: representation, hiring, promotion, retention
- ERG activity: gatherings, cultural celebrations, business partnership, leadership development
- Thought leadership & action: emerging workforce trends, inclusion risks
- Budget review
- Executive Sponsor engagement
- Policy update
- Workplace climate discussions

Quarterly Agenda

Recommended participants: ERG leadership team, Executive Sponsor, and relevant governance or organizational partners.

- Strategic progress to date
- Executive Sponsor update
- Quarterly business alignment & prioritization
- Quarterly budget assessment
- Cross-ERG forum

Illustrative KPIs

- Membership and participation rates
- Sponsor engagement and leadership participation
- Talent pipeline, mentoring, internship conversion, retention and promotion
- Employee listening, belonging and engagement measures
- Budget utilization and event outcomes
- Business impact, organizational health and transformation progress

Organizations should select the measures that best align with their goals and governance model. In developing this toolkit, we also reviewed publicly available information and resources from other organizations to help inform the content.

04

Communications Pack

Templates and guardrails for clear, inclusive, consistent ERG communications.

Communications Guardrails

- Use approved company brand and tone and inclusive language.
- Do not include confidential or client information, forward-looking statements, or endorsement language unless approved.
- Build in accessibility basics such as plain English, headings, alt text, descriptive links, and image contrast.
- Obtain written consent for non-public photos and quotes.
- Keep writing human: short sentences, active voice, minimal jargon.

Suggested Workflow

Draft message → sense check with ERG leadership team → sponsor review (optional) → communications owner approval (if required) → publish → review engagement for improvement.

Allow approximately 3 business days for ERG leadership review and 5 business days where sponsor or communications approval is required, based on the source template.

Communications Approval Matrix

Scenario	Review Required
Internal event	ERG review
External speaker	Communications
Executive speaker	Communications/HR
Media involvement	PR
Vendor promotion	Compliance

New Member Welcome Email

- Subject/headline: Welcome to [ERG Name] — here's how to get involved
- Warm welcome and brief ERG purpose
- What to expect: events, community, development, updates, resources
- Action links: community channel, events, intro/FAQs, volunteer opportunity
- Participation norms and privacy/opt-out line
- Close with ERG contact information

Intranet Post / Event Promotion

- Title: action + audience + outcome
- Summary: what it is, why it matters, what to do next
- What's happening; why it matters; who should join; date/time/location
- Three takeaways or benefits
- Call to action and contact information
- Accessibility notes and ERG purpose/mission footer

Leader Message

- Subject/headline: commitment/purpose + topic
- Why the leader supports the ERG/topic
- Connect to legitimate organizational outcomes and values
- Specific ask: join, attend, share, or ally action
- Close with appreciation and link

Post-Event Follow-Up

- Send within 24–48 hours; aim for 150 words or less
- Thank you + one highlight
- One clear ask or feedback link
- 1–2 key takeaways
- Link to next event/newsletter and event image(s)

05

Budget & Event Planning

Simple tools to manage ERG spending and plan consistent, well-coordinated events.

ERG Budget Tracker

Date	Vendor	Description	Payment Method	Invoice Payment Date	Submitted By	Comments	Amount

Suggested setup fields: Department # to allocate, calendar year, annual allocation, and expense details. Track estimated/approved budget and actual spending using your organization's normal finance process.

Events Playbook

Use the checklist as a starting point, not a rigid script. Confirm space, budget, food, staffing, accessibility, security, and facilities needs early, and assign a clear owner for each workstream.

4+ Weeks Before

- Confirm event vision, date/time, attendance estimate, office support, space, accessibility/security needs, RSVP, AV/tech
- Confirm event budget, funding source, spend categories, and approvals

2–3 Weeks Before

- Finalize invitations and promotion
- Plan food, beverages, supplies, décor/tableware/serving items, and engagement materials
- Confirm setup, cleaning, security, and access needs

1–2 Weeks Before

- Determine volunteer roles and staffing
- Recruit volunteers and assign responsibilities for setup, coverage, photography, cleanup, and greeting

Day Before

- Confirm deliveries/pickups, volunteer assignments, setup timing, trash/recycling, and beverage storage

Day Of

- Set up stations, furniture, water, labels, paper products, AV, and waste bins
- Monitor beverages/trash and greet guests

After Event

- Clean/reset space, account for rentals/borrowed items
- Capture lessons learned, update inventory, thank volunteers, and send a post-event survey

Virtual or Hybrid Event Planning Timeline

Use the checklist as a starting point, not a rigid script.

8+ Weeks Before (Event Strategy & Planning)

- Confirm event purpose, audience, date/time, budget, approvals, and success measures.
- Secure speakers, moderator(s), virtual platform, and accessibility requirements.
- Assign workstream owners and establish registration and attendance tracking.

6+ Weeks Before (Communications & Event Development)

- Launch registration, invitations, and promotional activities.
- Finalize agenda, engagement activities, and attendee experience.
- Coordinate with speakers and collect presentation requirements and materials.

4+ Weeks Before (Content & Operational Readiness)

- Monitor registrations and adjust promotion as needed.
- Finalize presentations, event resources, run of show, and event-day roles.
- Confirm recording, captioning, technical support, and accessibility accommodations.

2+ Weeks Before (Testing & Final Preparation)

- Conduct speaker briefings, platform orientation, and rehearsal sessions.
- Test audio, video, screen sharing, polls, and engagement tools.
- Send attendee reminders and confirm all speakers, support staff, and contingency plans.

Day Before

- Complete final platform, presentation, and recording checks.
- Confirm speaker attendance, event contacts, and support coverage.
- Load final presentations, polls, and engagement activities.

Event Day

- Open the platform early and complete final speaker checks.
- Manage attendee experience, engagement, Q&A, chat, and technical support.
- Monitor attendance, recording, and overall event execution.

After Event

- Send thank-you communications, recordings, resources, and survey.
- Review attendance, engagement metrics
- Conduct a retrospective and document lessons learned and recommendations.

ERG EVENT RETROSPECTIVE FORM

Reflective practices drive continuous improvement

A retrospective is a simple but powerful way to turn an event into a learning opportunity. By reviewing goals, outcomes, participant feedback, and lessons learned, teams can better understand what created value and where improvements can be made.

Organizations across industries use retrospective processes as part of continuous improvement efforts. Capturing insights while they are still fresh helps teams build on successes, address challenges, and make future events more impactful, efficient, and aligned with organizational goals.

Information to Capture and Why

Information	Why It Matters
Event purpose and objectives	Confirms intended outcomes
Attendance and engagement	Measures reach and participation
Budget and resources used	Supports responsible resource planning
Participant feedback	Identifies what attendees value most
Successes and challenges	Drives continuous improvement
Recommendations	Creates a roadmap for future event leaders

Recommended Timeline

Timing	Action
Day of Event	Capture attendance and key observations
Within 3 Business Days	Collect surveys and stakeholder feedback
Within 5-10 Business Days	Conduct retrospective meeting
Within 10 Business Days	Complete and submit retrospective documentation

Meeting Agenda

Purpose	Duration	Gather
Review Event Goals	5 minutes	- What was the purpose of the event? - What outcomes were we hoping to achieve?
Review Results	10 minutes	- Attendance and participation data - Budget spent vs. budget planned - Volunteer involvement - Survey results or participant feedback
Discuss What Worked Well	10 minutes	- Most successful elements - Positive attendee feedback - Effective processes or partnerships
Identify Improvement Opportunities	10 minutes	- Challenges or barriers encountered - Unexpected issues - Opportunities to increase impact, reach, or efficiency
Define Future Recommendations	5 minutes	- What should be repeated? - What should be changed? - What resources or support would improve future events?

ERG Retrospective Template

Date of Event	Title of Event	Delivery Mode	
[insert date]	[insert title]	[Location/hybrid/virtual]	
Purpose of the event	[include description, purpose, desired outcomes, goals]		
Level of Engagement	[rate level of engagement 1-5, 1 being not engaged 5 being extremely engaged]		
Estimated attendance	[insert estimated attendance]	Actual Attendance	[insert actual attendance]
Estimated Cost	[insert estimated cost]	Actual Cost	[insert actual cost]
Key Successes	What contributed most to the event's success,	[e.g. The planning team maintained clear communication throughout the process, resulting in a smooth event experience. Attendees were highly	

	and what should be repeated? Focus on specific actions, decisions, or approaches that worked well and should be considered for future events.	<i>engaged during the discussion, and feedback indicated that the content was relevant, informative, and aligned with audience interests.]</i>
Opportunities for Improvement	What challenges or gaps were identified, and how can they be addressed in the future? Focus on specific observations, challenges, or process improvements rather than assigning blame.	<i>[e.g. Consider areas such as planning, communication, timing, logistics, technology, resource availability, audience engagement, or role clarity. The goal is to capture constructive insights that can help improve future events. Registration numbers were lower than expected due to a shortened promotion period. Some attendees had trouble hearing portions of the presentation, and additional time for audience questions may have increased engagement.]</i>
Participant Insights	Summarize the key themes, comments, and suggestions provided by attendees through surveys, evaluations, conversations, or other feedback channels.	<i>[e.g. Participants appreciated the networking opportunities and practical takeaways from the speaker. Several attendees suggested allowing more time for Q&A and offering additional follow-up resources after the event.]</i>
Future Recommendations	Capture suggestions that could enhance future events and increase their impact, reach, or effectiveness.	<i>[e.g. Consider extending networking time, introducing an interactive activity, partnering with another employee group to expand reach, or promoting the event earlier to increase attendance. Prioritize ideas that are realistic, actionable, and likely to create a positive experience for participants.]</i>

06

Business Linkage Tracker

A single place to map internal and external stakeholders, define relationship objectives, and track engagement and outcomes.

Purpose: capture requests, opportunities, and engagements between the business and the ERG; prioritize actions and owners; track outcomes, dependencies, risks, and follow-up; and support consistent governance reporting.

Recommended cadence: review whenever the ERG leadership team meets, or at least monthly. Action owners should update their line items before ERG leadership team meetings.

Internal Stakeholder Tracker

ERG Owner Role	ERG Owner Name	Stakeholder	Function / Business	Role / Title	Location	Contact Method	ERG Value Alignment	Relationship Objective	Success Measure	Status	Cadence	Last	Next	Success?	Notes

External Stakeholder Tracker

ERG Owner	Stakeholder	Company	Function / Business	Role / Title	Location	Contact Method	Contact Info	ERG Value Alignment	Success Measure	Status	Last	Next	Success?	Notes

ERG Measurement Framework

Purpose

The purpose of ERG measurement framework is to:

- Monitor ERG health and sustainability
- Evaluate member engagement and participation
- Demonstrate alignment with organizational priorities
- Identify opportunities for improvement
- Support annual planning and resource allocation
- Measure business impact over time

Membership & Reach

Purpose: Measures the breadth of the ERG's influence and helps determine whether employees across locations, business units, and populations are aware of and engaging with the network.

Risk of Not Tracking: The ERG may not realize participation is declining, limited to certain locations, or failing to reach new audiences.

Question: Who are we engaging and how broadly are we reaching employees?

Percentage of employees participating	Geographic representation
Total members	Business unit representation
Membership growth rate	New member enrollment

Reporting Frequency	Success Indicators
Monthly Tracking	Year-over-year membership growth
Quarterly review	Broad participation across locations and business units
Quarterly review	Increased participation beyond leadership team

Member Engagement & Program Impact

Purpose: Measures the effectiveness of ERG programming and whether activities are creating meaningful employee experiences.

Risk of Not Tracking: ERGs may overinvest in activities that generate low value, fail to execute annual plans effectively, or fail to understand whether events are creating value for employees.

Question: Are employees actively participating in and finding value in ERG offerings?

Repeat participation rate	Net Promoter Score (optional)
Volunteer participation rate	Sense of belonging score
Event completion rate against annual plan	Co-hosted events
Event attendance rate	Event satisfaction

Sample Survey Questions

- I feel welcomed and included in this ERG.
- Participation provides value to my professional development.
- I would recommend participation to a colleague.
- ERG activities align with organizational values.

Reporting Frequency	Success Indicators
After major events	High repeat attendance
Quarterly summary	Positive satisfaction scores
Quarterly summary	Increased volunteer involvement

Financial Stewardship

Purpose: Demonstrates responsible management of ERG budgets, resources, and investments while supporting transparency and accountability.

Risk of Not Tracking: Budget overruns, inefficient spending, underutilized resources, and difficulty justifying future funding requests may occur.

Question: Are resources being used responsibly?

Budget utilization percentage	Forecast vs actual spend
Spend by category	Number of events delivered within budget
Cost per participant	Sense of belonging score
Cost per event	Perceived value score

Reporting Frequency	Success Indicators
After major events	Budget accuracy
Quarterly summary	Minimal unplanned expenses
Quarterly summary	Demonstrated return on investment

Quarterly Dashboard

The objective of this dashboard is not to "grade" ERGs, but rather to provide meaningful insights that help ERG leaders understand participation, demonstrate value, improve programs, and support sustainable growth. Organizations should focus on trends, member experience, and continuous improvement rather than comparing ERGs against one another or using metrics as performance evaluations.

Measure	Q1	Q2	Q3	Q4	YoY Change
Total Members	[x]	[x]	[x]	[x]	[%]
Total Events Held	[x]	[x]	[x]	[x]	[%]
Event Attendance	[x]	[x]	[x]	[x]	[%]

Event Satisfaction Score	[x]	[x]	[x]	[x]	[%]
Event Belonging Score	[x]	[x]	[x]	[x]	[%]
Budget Used	[x]	[x]	[x]	[x]	[%]
Net promoter score	[x]	[x]	[x]	[x]	[%]
Total Volunteer Hours	[x]	[x]	[x]	[x]	[%]
Total Number of Members Participating	[x]	[x]	[x]	[x]	[%]
Co-hosted events	[x]	[x]	[x]	[x]	[%]

Toolkit Adoption Checklist

- Replace all bracketed placeholders and organization-specific fields.
- Select the ERG governance model and role structure that fit your organization.
- Confirm leadership selection, succession, and approval paths.
- Align meeting cadence and expected participants to the governance model.
- Confirm budget, event, communications, external engagement, accessibility, privacy, risk, and compliance requirements.
- Identify where ERG records will be stored and who owns each tracker/template.
- Route materials through appropriate organizational review before adoption.
- Set an effective date and a regular review cycle.