EMPOWERING 2SLGBTQIA+ WORKERS IN ENERGY

Checklist for Establishing an Employee Resource Group on the Jobsite

This checklist provides a framework for establishing an Employee Resource Group (ERG) that is well-resourced, supports employees, and is impactful in field-based work environments.

These steps do not need to follow the exact order laid out in this tool, and they may vary based on the organization's needs and whether the ERG is initiated by the organization or by employees.

QUICK START CHECKLIST

✓	Action	Comments
○	1. **Appoint an executive sponsor** with clear authority, not only symbolic support. The sponsor should have a clear role description and meet regularly with the ERG.	
○	2. **Confirm an operating budget** to cover ERG activities and events. Also, provide paid time for ERG leaders and access to internal resources, such as marketing and communications.	
○	3. **Recruit ERG members** by posting on the company intranet site, posting information in common areas like the break room, reaching out to employees who are already active in other groups or programs, or by talking to key contacts in the HR and DEI departments.	
○	4. **Identify an ERG Chair / Co-Chairs** to lead the group, including providing direction, facilitating meetings, and building consensus for decision-making. Ensure the role and responsibilities are defined in a job description, plan ahead for succession, and provide paid working time.	
○	5. **Appoint ERG operating roles** such as secretary, treasurer, project lead(s), field-based representatives, regional site champions, etc. Ensure roles and responsibilities are defined by clear job descriptions that specify expectations and time commitments.	
○	6. **Establish an ERG charter or business plan** that details the group's vision, mission, scope, governance structure, and membership model. This document can be 1 or more pages and may also include information on confidentiality, accessibility, intersectionality, operating procedures, relationship with other ERGs, etc.	

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⭘	7. **Set 3 annual objectives** with simple success measures (e.g., membership rate, event attendance, training completion, reach of initiatives). These objectives should provide a clear focus for the ERG's activities and allow progress to be monitored and reported on throughout the year.	
⭘	8. **Agree on a field-first approach** that ensures the ERG has at least one field-based representative or site champion per region. This embeds local perspectives in decision-making and ensures initiatives are effectively communicated and supported across all locations.	
⭘	9. **Build short slide decks** which ERG leaders can use to introduce the ERG, highlight initiatives, and recruit members. These decks provide a consistent, easy-to-use tool that ensures clear messaging and engagement across different teams and audiences.	
⭘	10. **Align ERG goals** with HR and DEI, ensuring objectives are integrated with and aligned with organizational strategies and priorities. This ensures consistency in inclusion efforts and demonstrates the value the ERG provides.	
⭘	11. **Use low-tech communication methods** to share monthly updates, ensuring information is accessible to all employees regardless of location or role.	
⭘	12. **Prevent burnout** by setting a realistic scope for the ERG overall and ERG activities, rotating role assignments periodically, and encouraging honesty about workload and capacity.	

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