

# Intergenerational ERG Toolkit

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by **ELEVATE**

Sponsored by **AARP**<sup>®</sup>



## Welcome!

If you're reading this, you're curious about how your organization can be one where all employees can thrive in every phase of their careers without encountering age or generational biases.

The issue has never been more pressing. In a recent AARP study<sup>1</sup>, 83% of employers said that creating a more multigenerational workforce would drive their success and growth. They believe that their organizations need to do more to maximize the full potential of an age-diverse workforce. In fact, these executives highlighted age as a top area of diversity management that requires the most improvement.

This creates major opportunities for employers, who now consider it a key business strategy to address the needs and unleash the synergies of a workforce that can span as many as five generations. C-suites nationwide are now working directly with their employees to build solutions that work for all, and ERGs are a key tactic to use.

You're holding a powerful Toolkit that you can use to leverage your Employee Resource Groups (affinity groups, or BRGs) to build the careers of your employees across all ages and career phases. You don't have to be the CEO or Head of HR to use this kit. You can use it as a staff member, a manager, a senior leader, or someone in the HR team. The Tools here can be used by organizations of all sizes, from 25 employees to over 25,000. They can be adapted for organizations with all types of employees and all industries.

You can use this Toolkit to:

1. Win buy-in from key influencers in your organization to engage your ERGs around age inclusion,
2. Start a new Intergenerational ERG, or
3. Build a specific initiative about age inclusion across all your current ERGs.

The kit has everything you need to design and build a successful first year of your initiative. As you use it, share your successes by emailing us at [employerpledge@aarp.org](mailto:employerpledge@aarp.org).

We are grateful for the partnership between Workable Concept and Elevate for their partnership in creating this Toolkit for you.



Warm regards,

Heather Tinsley-Fix  
Senior Advisor, Employer Engagement

[1] "According to the AARP Global Employer Survey 2020, 83% of employers state that it would be very or at least somewhat valuable to their organisation's success and growth to create a more multigenerational workforce. Executives in large global companies recognise that their organisation would need to undertake more efforts to maximise the full potential that an age-diverse workforce offers, listing age, besides disability, as the area of diversity management that requires most improvement (Forbes Insights, 2011[33])"

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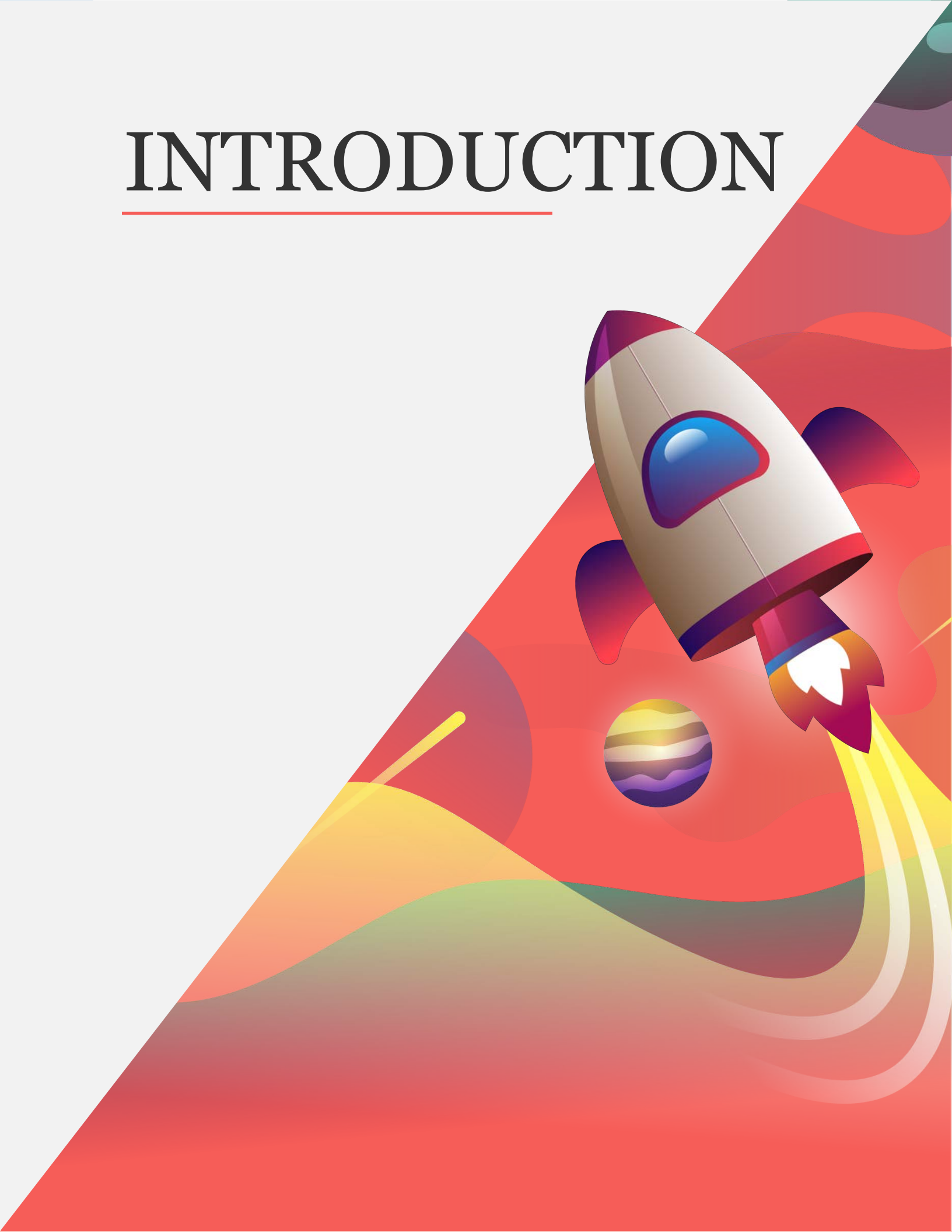
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## RESOURCES



# INTRODUCTION

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# The Value-creation Strategy Hiding in Plain Sight

Today's "multigenerational workforce brings together a greater mix of workers at all ages than in the past when workplaces typically consisted of larger numbers of younger workers and relatively few older workers."<sup>2</sup>

Our multigenerational workplaces "include people with a diverse range of perspectives depending on their life stages and different experiences. Some (but not all) of these may be linked to age."<sup>3</sup> In fact, "despite the widespread belief that each generation has a distinctive and fixed set of needs and motivations concerning work, there is much more evidence that workers of all ages broadly value the same things."<sup>4</sup> Regardless of the age or generation of the worker, their career phase and life stage often present consistent needs and challenges for employers to address.

Where age and generation matter in the workplace is in the age bias that plays out across employees of all ages, but especially younger and older career professionals. How managers address age-bias can lead to either a fully engaged and productive team or one that leaves considerable value untapped for the organization. At scale, age bias and managers' approach to age diversity quickly become strategic issues for the organization.



On the other side, "employers who can successfully combine the talents and diverse outlooks of their employees—whatever their age—generally find their workforce enriched and more productive as a result," according to the OECD.<sup>5</sup> Thus, "a key advantage of a multigenerational workforce is that it enables effective synergies between experienced and less experienced staff to the benefit of employers and employees."<sup>6</sup>

"Reaping these benefits<sup>5</sup> will require putting in place tailored support at all ages and strengthening collaboration between generations."<sup>7</sup> ERGs are a natural environment in which to provide tailored support and strengthen collaboration, and most employers already do so around gender, race, ethnicity, disability, and sexual orientation. Wise employers will leverage their ERGs to do the same around age inclusion.

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[2,3,4,5] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*. <https://doi.org/10.1787/59752153-en>  
[6,7] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.55. <https://doi.org/10.1787/59752153-en>

## INTRODUCTION

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# Why is this Intergenerational ERG Toolkit Valuable?

Your ERGs are a key strategy to enable critical employee groups to:

1. Gain a sense of belonging in your organization
2. Benefit from a community of support, and
3. Participate in targeted efforts to recruit, retain, develop, and promote underrepresented employees in leadership or other key positions.

This Toolkit offers practical, actionable ideas to help you:



**Gain insight into your organization's issues related to age or life-stage, and help employees successfully navigate assumptions around age and generation.** You can leverage the Toolkit to create ways for your organization to understand what employees at every career phase need to pursue their professional ambitions successfully.



**Develop leadership skills across employees of all ages.** Organizations that leverage ERGs for leadership development are more likely to be high-performing organizations than those that do not. You can harness this power of ERGs to support employees of all ages by providing resources to build their leadership, professional skills, and networks.



**Recruit and retain age-diverse talent.** Having a thriving Intergenerational ERG initiative sends a strong signal to prospective and current employees that they:

1. Belong in your organization and have a community of support
2. Can access key leadership development opportunities to ensure a clear career path – however they choose to define it.

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## Quick Terminology Notes

Throughout the Toolkit, we refer to “ERGs,” which are Employee Resource Groups. Organizations have their own names for these groups, from Business Resource Groups and Employee Networks to Affinity Groups and Culture Groups. We apply the term ERG to represent all of these. It is a group where employees who identify with or ally with a particular aspect of identity can come together to build their network, develop professional skills, and engage in activities and conversations about core issues of Diversity and Inclusion.

Throughout the Toolkit, we refer to “age-inclusive workplaces,” “multigenerational workplaces,” and “intergenerational workplaces.” These terms are used interchangeably by the experts we cite here. They all refer to creating a workplace where employees feel a sense of inclusion and belonging at all phases of their careers. These terms acknowledge that although the needs of employees are not specifically tied to their age or generation, age bias does exist and needs to be navigated throughout their careers.

# SECTION I

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Why Will an Intergenerational  
ERG Initiative Drive Your  
Organizational Goals?



## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

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## In this section

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As you strengthen Diversity, Equity, and Inclusion efforts at your organization, remember that age is the one aspect of identity that we all experience over time and is often **under-supported by current DE&I efforts.**

**So, who are the employees affected by age-related bias and inclusion in your organization?** Your new Gen Z hires who feel they need to dress differently to appear older in order to be heard in meetings. Your Millennial employee is a great manager but has a blind spot around how his age bias affects his team's productivity. Your Gen X employee worried about whether they will be passed over for promotion because they just turned fifty. Your Boomer employee who cannot afford to retire yet knows the stark reality of what a job search would look like if you laid them off and so lives with daily stress about their future financial security.

**Left unsupported, employees who feel their age is a liability are more likely to drop out of your pipeline** for recruiting, developing, retaining, and promoting into leadership or other key roles. Left unsupported, many will take their skills, experience, and talent to a new organization.

**This is why your DE&I efforts need to address and support age inclusivity as a strategic initiative specifically.** It is critical to your organization's ability to achieve not only your DE&I goals but your overall business and organizational success.

## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# Age inclusion is good for business

Over **4%**

boost to GDP was **forfeited** in 2018 by American industries because of age discrimination in the workforce.<sup>8</sup>



How much of that was in your organization?  
What could happen if your organization had a 4% higher net income every year?



Here's how a multi-generational workforce creates financial value for an employer:

- ✓ Higher productivity per employee
- ✓ Greater diversity of ideas, knowledge, and skillsets
- ✓ More resilience
- ✓ Stronger pipeline of talent
- ✓ Improved workforce continuity, stability, and retention of intellectual capital.<sup>9</sup>

## Business Benefits of a Multigenerational Workforce<sup>10</sup>



[8] AARP & The Economist. (2020). *The Economic Impact of Age Discrimination: How Discriminating Against Older Workers Could Cost the U.S. Economy \$850 Billion*. <https://doi.org/10.26419/int.00042.003>.

[9,10] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*. <https://doi.org/10.1787/59752153-en>.



## SECTION I

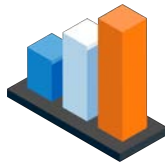
### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# The ROI of an age-inclusive workplace is compelling

“Numerous studies have shown the benefits of a diverse, equitable workplace for business performance, innovation, customer loyalty, and employee trust. Diverse teams better represent the customers they serve, make decisions with fewer blind spots, and bring more varied and innovative thinking to problem-solving”<sup>11,12</sup> Firms with older workers than their competitors are more productive.<sup>13</sup>

10%

increase in the share of workers aged 50+ can generate companies:



One-off gain worth slightly  
**more than a year**  
of growth<sup>14</sup>

4%

lower turnover<sup>15</sup>



This increase in productivity leads to a range of secondary benefits, including improved profitability, more competitive product pricing, better employer branding, and the opportunity to raise market share, according to the Organization for Economic Cooperation and Development (OECD).<sup>16</sup>

**Both younger and older workers are more productive when working in age-diverse teams.** In fact, workers under age 35 are the least productive but experience productivity gains when they work with older workers. Workers over age 50 have similar productivity levels as those aged 35-49 and are more productive when there are more younger workers.<sup>17</sup>

**Creating an age-inclusive organization now will yield increasing value over time.** Increased longevity and declining birth rates indicate that the 5-generation workforce is here to stay.



25%

of the workforce are 55+ years of age<sup>18</sup>, that's

**2x more**  
than 25 years ago<sup>19</sup>

[11] Howson, C. (2021, March 21). *To Make Real Progress on D&I, Move Past Vanity Metrics*. Harvard Business Review. <https://hbr.org/2021/05/to-make-real-progress-on-di-move-past-vanity-metrics>.

[12] Lorenzo, R., & Reeves, M. (2018, January 30). *How and Where Diversity Drives Financial Performance*. Harvard Business Review. <https://hbr.org/2018/01/how-and-where-diversity-drives-financial-performance>.

[13, 15] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.54. <https://doi.org/10.1787/59752153-en>

[14, 16] Heaslip, E. (n.d.). *5 Benefits Of Age Diversity In The Workplace*. Vervoe. <https://vervoe.com/age-diversity>.

[17] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.65. <https://doi.org/10.1787/59752153-en>

[18] Julia Carpenter, CNN Business. (2019, January 22). *Why ageism hurts men more than women*. CNN.

<https://edition.cnn.com/2019/01/22/success/ageism-women-work/index.html>.

[18] Julia Carpenter, CNN Business. (2019, January 22). *Why ageism hurts men more than women*. CNN.

<https://edition.cnn.com/2019/01/22/success/ageism-women-work/index.html>.

[19] Reiners, B. (2019, July 17). *The Cold, Hard Truth About Ageism in the Workplace*. Built In. <https://builtin.com/diversity-inclusion/ageism-in-the-workplace>.

# SECTION I

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## Unit I

Why is Age Diversity a Key Issue  
for Our DE&I Efforts to Support?

### GOAL:

To advance your  
understanding of how a  
multi-generational workforce  
can help your organization  
achieve its goals.





## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# Employers see the need, but they need a kickstart.

## The good news?

Over **70%**  
of employers report that they would like to implement or at least explore multi-generational workforce policies<sup>20</sup>

Nearly **50%**  
of global employers have a DE&I strategy that already explicitly includes age as a facet of diversity—more than for any other dimension of diversity<sup>21</sup>

## Now the bad news.



Over **95%**  
of employers have not developed specific tactics to ensure their workplace is age-inclusive<sup>22</sup>

Good intentions may be slowed by lack of data and resources to act. Without defined tactical efforts, harmful policies such as mandatory retirement ages remain in place, and clear opportunities are missed.

As many are living longer, some will want or need to work longer.<sup>23</sup>



To leverage the strengths of the four-to-five generation workforce, global executives are interested in promising practices related to:<sup>23</sup>

**81%** Lifelong learning

**78%** Financial planning

**73%** Family caregiving

Global executives would implement practices regarding the following if tools and support were available:<sup>23</sup>

**74%** Training & lifelong learning opportunities

**70%** Unbiased recruitment

**68%** Purposely designed Mixed-age teams

[20] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.54. <https://doi.org/10.1787/59752153-en>.

[21,22] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.90. <https://doi.org/10.1787/59752153-en>.

[23] AARP. (n.d.). *Living, Learning, and Earning Longer*. <https://www.aarpinternational.org/initiatives/future-of-work/living-learning-and-earning-longer>.

## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

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## DE&I can catalyze action.

When **83%**

of executives say that creating a more multigenerational workforce would drive their success and growth,<sup>24</sup>

yet there is a dearth of action, DE&I leaders can step in to bridge the gap:



## They can use ERGs as a key tactic.

A recent OECD study specifically suggests that “engaging ERGs and their members to understand needs, test solutions, and target specific groups that carry heavier loads is a highly effective, efficient way to move towards a multi-generationally inclusive workforce.”<sup>25</sup> In this work, “it’s important for DEI solutions to recognize the intersectionality between generations, age, and all other aspects of diversity and inclusion.

Indeed, the various generations may view diversity issues in different ways that are more linked to their formative influences and experiences unless they are confronted with or seek out experiences of diverse people.”<sup>26</sup>

Ultimately,

“age is not static, and bias can—and eventually will—affect people at any age.”<sup>27</sup>



This puts age-inclusivity squarely in the court of all leaders who value diversity, equity, and inclusion. Every employee has a stake in it, and every manager too.

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[24] “According to the AARP Global Employer Survey 2020, 83% of employers state that it would be very or at least somewhat valuable to their organisation’s success and growth to create a more multigenerational workforce. Executives in large global companies recognise that their organisation would need to undertake more efforts to maximise the full potential that an age-diverse workforce offers, listing age, besides disability, as the area of diversity management that requires most improvement (Forbes Insights, 2011[33])”

[25] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.70. <https://doi.org/10.1787/59752153-en>.

[26,27] Thomson Reuters. (2021, September 14). *How organizations can address ageism as part of their DEI strategy*. Thomson Reuters Institute. <https://www.thomsonreuters.com/en-us/posts/legal/addressing-ageism>.

## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# Your employees see age bias—but they don't see you address it

## Age is the most common reason for work-related discrimination

Workers are more likely to report they have experienced discrimination due to age compared to gender, race, disability, family responsibilities, nationality, and/or religion.<sup>28</sup>

**“Over 50%**  
of co-workers who  
witnessed instances of  
age discrimination did not  
report it.”<sup>29</sup>

**“Up to 78% in 2020  
from 61% in 2018.**  
Older workers increasingly  
reported that they have seen or  
experienced age discrimination  
in the workplace.”<sup>30</sup>

**“95%**  
of workers in their fifties  
who have noticed age  
discrimination firsthand see  
it as a common occurrence  
in the workplace.”<sup>31</sup>

## Age bias plays out throughout the age spectrum

While it may not be surprising that  
**35%**  
of workers aged 50-64 have  
experienced age discrimination,  
nearly **20%**  
of the age groups, 15-34 and 35-49,  
also report that they have experienced  
age-based bias in their workplace.<sup>32</sup>



“Some research suggests that younger employees are more affected by attitudinal ageism (assumptions, stereotypes, and language choices used to describe them). In comparison, older employees are more likely to encounter punitive actions based on age discrimination (e.g., targeted for layoffs).”<sup>33</sup>



**“1 in 4**  
workers aged 45 and over have  
been signaled out negatively for  
their age by managers or  
supervisors.

On the other side, young employees  
may also feel left out of leadership  
roles or opportunities because of  
their age.”<sup>34</sup>

[28,32] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.88. <https://doi.org/10.1787/59752153-en>.

[29] SeniorLiving. (2020, May 21). *Workplace Age Discrimination Statistics*. SeniorLiving.Org. <https://www.seniorliving.org/research/age-discrimination-statistics-facts>.

[30] Thomson Reuters. (2021, September 14). *How organizations can address ageism as part of their DEI strategy*. Thomson Reuters Institute. <https://www.thomsonreuters.com/en-us/posts/legal/addressing-ageism>.

[31] Reinert, B. (2019, July 17). *The Cold, Hard Truth About Ageism in the Workplace*. Built In. <https://builtin.com/diversity-inclusion/ageism-in-the-workplace>.

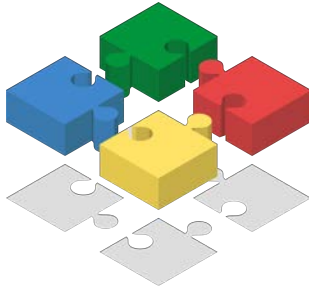
[33] Snowden, G. (2012, January 16). *Young and older people “experience age discrimination at work.”* The Guardian. <https://www.theguardian.com/money/2012/jan/16/young-older-people-age-discrimination-work>.

[34] Gafni, N. (2021, July 1). *Do Your DE&I Efforts Consider Age, Class, and Lived Experience?*. Harvard Business Review. <https://hbr.org/2021/07/do-your-dei-efforts-consider-age-class-and-lived-experience>.

## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# Age is the most common dimension of DE&I strategies but usually lacks support



**“46%**

of employers with a DE&I strategy include age as a defined dimension of diversity

**Compared to:**

**42%** for gender

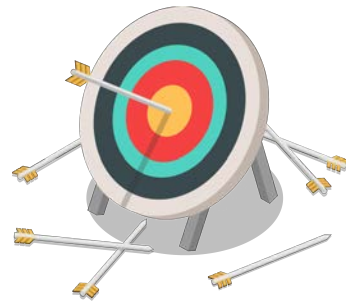
**37%** for race/ethnicity

**36%** for disability

**28%** for sexual orientation”<sup>35</sup>

**Only 5%**

of employers have defined policies to help create a multigenerational workforce, such as unbiased recruitment processes, phased retirement, or life-long learning opportunities.<sup>36</sup>



**“People are more likely to report age discrimination if they have been educated about it.**

**65%**

of respondents **with training** in age discrimination reported when witnessed

vs

**49%**

of respondents **without training** in age discrimination reported when witnessed.”<sup>37</sup>

[35,36] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.90. <https://doi.org/10.1787/59752153-en>.

[37] SeniorLiving. (2020, May 21). *Workplace Age Discrimination Statistics*. <https://www.seniorliving.org/research/age-discrimination-statistics-facts>.

## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

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## Your employees may be reluctant to talk about their concerns about age bias

Only **3%**

of workers age 45+ have ever made an official complaint about age discrimination. Even though:

**16%**

cited not getting hired for a job they applied for because of their age

**12%**

cited being passed up for a promotion or another chance to get ahead.<sup>38</sup>

**15%**

of workers age 45+ have heard negative remarks related to their older age from a colleague or supervisor



Employees underreport because they fear retaliation in reduced roles or uncharacteristically low-performance reviews that result in termination.<sup>39</sup>

In fact,

**Around 50%**

full-time workers between 50 and 54 will lose their jobs involuntarily.<sup>40</sup>

As workers plan to retire later (at age 66 up from 63 in 2001<sup>41</sup>), their heightened risk of long-term unemployment makes them less likely to raise concerns with their current employer.

Younger workers are often more aware of bias and potentially more inclined to notice age bias. Still, they may underreport because they know that the federal age discrimination law does not protect employees under age 40. (Some state age discrimination laws protect workers regardless of age.)

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[38] Perron, R. (2018, July). *The Value of Experience Study*. AARP. <https://www.aarp.org/research/topics/economics/info-2018/multicultural-work-jobs.html>.

[39] Fisher Phillips. (2020, May 14). *Age Is More Than A Number: Trends In Workforce Composition, Ageism, And Efforts To Address The Elephant In The Room*. <https://www.fisherphillips.com/news-insights/age-is-more-than-a-number-trends-in-workforce-composition-ageism-and-efforts-to-address-the-elephant-in-the-room.html>.

[40] Johnson, R. & Gosselin, P. (2018, December 28). *How Secure Is Employment at Older Ages?* Urban Institute. <https://www.urban.org/research/publication/how-secure-employment-older-ages>.

[41] Reiners, B. (2019, July 17). *The Cold, Hard Truth About Ageism in the Workplace*. Built In. <https://builtin.com/diversity-inclusion/ageism-in-the-workplace>.

## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# Multi-Generational Issues Intersect with all Other DE&I Focus Populations, Creating Unique Challenges and Opportunities for Each

Ageism hits women earlier and harder.<sup>42</sup>

“Overall, women (64%) are more likely than men (59%) to say they have seen or experienced age discrimination.”<sup>43</sup>



## 76%

of women workers age 40+ reported having seen or experienced age discrimination in the workplace.<sup>44</sup>

Women suffer more age discrimination than men starting in their 40's,<sup>45</sup> and this differential grows as they get older.<sup>46</sup>



Given that women live longer, work longer, and more often have reduced savings due to caregiving phases during their career, age discrimination compounds their financial insecurity.<sup>47</sup>

Younger women must navigate decisions involving motherhood, which are (at least biologically) impacted by age. This very basic human fact leads to contexts in which decision-makers may unconsciously discount the potential of younger women due to the assumption that they will become mothers and/or “mommy track” them once they do.<sup>48</sup>

[42] Ahn, S., & Costigan, A. (2019, October 17). *Gendered Ageism (Trend Brief)*. Catalyst. <https://www.catalyst.org/research/gendered-ageism-trend-brief>.

[43] Perron, R. (2018a). *The Value of Experience: Age Discrimination Against Older Workers Persists*. <https://doi.org/10.26419/res.00177.002>.

[44] Perron, R. (2021). *As Economy Improves, Age Discrimination Continues to Hold Older Workers Back: Infographic*. <https://doi.org/10.26419/res.00445.003>.

[45] Cohen, P. (2019, June 8). *New Evidence of Age Bias in Hiring, and a Push to Fight It*. The New York Times. <https://www.nytimes.com/2019/06/07/business/economy/age-discrimination-jobs-hiring.html>.

[46,47] Federal Reserve Bank of San Francisco. (2017, February 27). *Age Discrimination and Hiring of Older Workers*. <https://www.frbsf.org/economic-research/publications/economic-letter/2017/february/age-discrimination-and-hiring-older-workers>.

[48] Ferrante, M. (2018, October 31). *Before Breaking The Glass Ceiling, Women Must Climb The Maternal Wall*. Forbes. <https://www.forbes.com/sites/marybethferrante/2018/10/31/before-breaking-the-glass-ceiling-women-must-climb-the-maternal-wall>.

## SECTION I

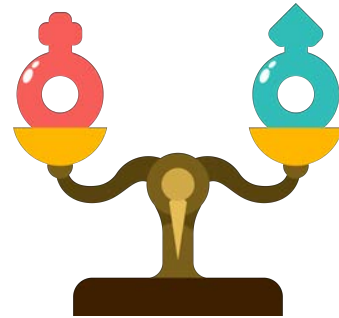
Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

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# Multi-Generational Issues Intersect with all Other DE&I Focus Populations, Creating Unique Challenges and Opportunities for Each

“Many companies have been actively pursuing greater gender balance over the past decade.

These companies now have workforces with much higher percentages of women in their 20s and 30s, while the over-50 segment remains majority male.



As many of these women look toward parenthood, leadership will have to ensure that these women don't feel forced to step back from their careers, as that could cost these companies a significant portion of their newfound gains in gender balance.

These trends also mean that companies will have a cohort of older, mostly male managers tasked with coaching and training a much more gender-balanced group of younger colleagues.



These two observations can inform a whole host of management initiatives designed to set up all parties for success as they progress through their careers.”<sup>49</sup>

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[49] Wittenberg-Cox, A. (2020, December 18). *How Companies Can Meet the Needs of a Changing Workforce*. Harvard Business Review. <https://hbr.org/2020/12/how-companies-can-meet-the-needs-of-a-changing-workforce>.



## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# Men of all ages are navigating changing gender norms in the workplace



**79%**

of male workers, age 40+ reported having seen or experienced age discrimination in the workplace.<sup>50</sup>

Men's career paths continue to veer from the traditional model as many younger men are in dual-career couples and choose to share parental duties more equally with their partners.

**43%**

of fathers want to work all or most of the time remotely. Close to 50% of mothers want that.<sup>51</sup>

**40%**

of family caregivers are men caring for adult family members, and they anticipate taking leave to care for family members at the same rate as women.<sup>52</sup>



**“Men are nearly as likely as women to agree and strongly agree that older workers should be equally protected.”<sup>53</sup>**

|              |           |                              |                       |           |                                       |
|--------------|-----------|------------------------------|-----------------------|-----------|---------------------------------------|
| <b>89%</b>   | <b>vs</b> | <b>93%</b>                   | <b>60%</b>            | <b>vs</b> | <b>70%</b>                            |
| of men agree |           | of women agree <sup>53</sup> | of men strongly agree |           | of women strongly agree <sup>53</sup> |

[50] Perron, R. (2021). *As Economy Improves, Age Discrimination Continues to Hold Older Workers Back: Infographic*. <https://doi.org/10.26419/res.00445.003>.

[51] Goldberg, E. (2022, March 10). *After Two Years of Remote Work, Workers Question Office Life*. The New York Times. <https://www.nytimes.com/2022/03/10/business/remote-work-office-life.html>.

[52] New America. (n.d.). *Lifting the Barriers to Paid Family and Medical Leave for Men in the United States*. <https://www.newamerica.org/better-life-lab/reports/lifting-barriers-paid-family-and-medical-leave-men-united-states/six-in-10-americans-anticipate-needing-to-take-leave-from-work-in-the-future>.

[53] Perron, R. (2018a). *The Value of Experience: Age Discrimination Against Older Workers Persists*. <https://doi.org/10.26419/res.00177.002>.



## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# The LGBTQ workforce is being reshaped by younger workers who are more diverse and stronger allies

## Nearly 50%

of LGBTQ workers remain closeted at work and fear being stereotyped or jeopardizing professional connections, based on a recent study.<sup>54,55</sup> Since the trend is towards coming out at younger ages,<sup>56</sup> **younger LGBTQ workers are more likely to be out at work than older colleagues.**



Particularly among younger generations, the LGBTQ workforce is far more racially diverse and more likely to include women, transgender employees, and people with more varied sexual orientations than in the past. That stems from a significant rise in the number of women identifying as LGBTQ (and a smaller increase in men identifying as LGBTQ).<sup>57</sup>

Among all respondents,

## 54%

of LGBTQ employees are women. And that trend is even more pronounced among younger respondents<sup>58</sup>

## Women make up

## 71%

of the LGBTQ population aged 25 to 34

## 78%

of the LGBTQ population aged 18 to 24<sup>58</sup>



## Only 1 in 5

U.S. employers offer paid family leave for LGBTQ employees,<sup>55</sup> which creates additional obstacles to pursuing a career and family goals at all ages, and compounds long-term financial insecurity.

[54] National LGBTQ Workers Center. (n.d.). *LGBT People In The Workplace: Demographics, Experiences and Pathways to Equity*. Movement Advancement Project. <https://www.lgbtmap.org/file/LGBT-Workers-3-Pager-FINAL.pdf>.

[55] Paul, K. (2019, October 11). Nearly 50% of LGBTQ Americans are in the closet at work. MarketWatch. <https://www.marketwatch.com/story/half-of-lgbtq-americans-are-not-out-to-co-workers-2018-06-27>.

[56] Pew Research Center. (n.d.). *Chapter 5: Identity and Community*. Pew Research Center's Social & Demographic Trends Project. <https://www.pewresearch.org/social-trends/2013/06/13/chapter-5-identity-and-community>.

[57,58] Dupreelle, P., et al. (2020, June 23). *A New LGBTQ Workforce Has Arrived—Inclusive Cultures Must Follow*. BCG Global. <https://www.bcg.com/publications/2020/inclusive-cultures-must-follow-new-lgbtq-workforce>.

## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# The LGBTQ workforce is being reshaped by younger workers who are more diverse and stronger allies

**44%**

of LGBTQ older people are very or extremely concerned that they will have to work well beyond retirement age in order to have enough money to live—nearly double the number of non-LGBTQ people<sup>59</sup>

**“1 in 4**

LGBTQ workers have stayed in a job primarily because the environment was very accepting of LGBTQ people

**1 in 10**

LGBTQ workers has left a job because the environment was not very accepting of LGBTQ people<sup>60</sup>

Given that older workers believe that ageism will make it significantly harder to find a new job, older LGBTQ workers are likely to be especially focused on staying with their current employer.



Young straight employees are increasingly attuned to LGBTQ issues, signaling a larger audience who cares about inclusion.<sup>61</sup>

Straight employees under 35 are:



**1.6x**

more likely to know LGBTQ colleagues

**3.6x**

more likely to join ally programs

**3x**

more likely to find value in their LGBTQ colleagues being out than older non-LGBTQ employees.

Straight Gen-Z and millennial workers are also significantly more likely to recognize discriminatory comments and actions against their LGBTQ colleagues.

[59] Espinoza, R. (n.d.). *Out & Visible: The Experiences and Attitudes of Lesbian, Gay, Bisexual and Transgender Older Adults, Ages 45–75*. SageUSA.org. <https://www.sageusa.org/wp-content/uploads/2018/05/sageusa-out-visible-lgbt-market-research-full-report.pdf>.

[60] Fidas, D., & Cooper, L. (n.d.). *A Understanding the Climate for LGBTQ Workers Nationwide*. Human Rights Campaign Foundation.

[https://assets2.hrc.org/files/assets/resources/AWorkplaceDivided-2018.pdf?\\_ga=2.123172939.1178884985.1636558942-27177111.1636558942](https://assets2.hrc.org/files/assets/resources/AWorkplaceDivided-2018.pdf?_ga=2.123172939.1178884985.1636558942-27177111.1636558942).

[61] Dupreelle, et al. (2020, June 23). *A New LGBTQ Workforce Has Arrived—Inclusive Cultures Must Follow*. BCG Global. <https://www.bcg.com/publications/2020/inclusive-cultures-must-follow-new-lgbtq-workforce>.

## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# Black employees are more likely to have seen or experienced age discrimination



**78%**

of workers age 40+ who are Black reported having seen or experienced age discrimination in the workplace (same as White workers) in 2020.<sup>62</sup> However, this similarity is a result of age discrimination increasing for White workers during the pandemic.

In 2018, AARP found that **African Americans/Blacks were more likely than others to say that:**<sup>63</sup>

Age discrimination is very common<sup>64</sup>

**44%** of Blacks vs **37%** of Whites

They strongly agree that older workers should be equally protected<sup>66</sup>

**73%** of Blacks and **78%** of Hispanics vs **62%** of Whites

Age discrimination begins when workers are in their 40s<sup>64</sup>

**16%** of Blacks vs **10%** of Whites

They strongly support strengthening age discrimination laws<sup>66</sup>

**74%** of Blacks and **75%** of Hispanics vs **56%** of Whites

They have made a report of age discrimination<sup>65</sup>

**6%** of Blacks vs **2%** of Whites

They have seen or experienced age discrimination<sup>65</sup>

**77%** of Blacks vs **61%** of Hispanics vs **59%** of Whites

**“Fewer than half**

of [Gen Z workers] surveyed said they felt they had a work mentor. And when broken down by race, **more than 40%** of those who did were White.”<sup>67</sup>



[62] Perron, R. (2021). *As Economy Improves, Age Discrimination Continues to Hold Older Workers Back: Infographic*. As Economy Improves, Age Discrimination Continues to Hold Older Workers Back: Infographic. <https://doi.org/10.26419/res.00445.003>.

[63,64,65,66] Perron, R. (2018a). *The Value of Experience: Age Discrimination Against Older Workers Persists*. <https://doi.org/10.26419/res.00177.002>.

[67] McMenamin, L. (2021, August 3). *Why younger workers want hybrid work most*. BBC Worklife. <https://www.bbc.com/worklife/article/20210729-why-younger-workers-want-hybrid-work-most>.

## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# In 2020, Hispanic/Latinx workers age 40+ were most likely to have seen or experienced workplace age discrimination

**82%**

of Hispanic workers age 40+ reported having seen or experienced age discrimination in the workplace in 2020. This is the highest of any racial, ethnic or gender-based group surveyed.<sup>68</sup>



“Hispanics/Latinos were more likely than Whites to support protection against age-discrimination



**75% vs 56%**  
of Hispanics of Whites  
strongly support strengthening  
age discrimination laws

**78% vs 62%**  
of Hispanics of Whites  
strongly agree that older workers  
should be equally protected”<sup>69</sup>

“Both Hispanics/Latinos and African Americans/Blacks are more likely than Whites to say the majority of these actions had happened to them since turning 40:

- **Not getting hired for a job** you applied for because of your age
- **Heard negative remarks** related to your older age from a colleague
- **Passed up for a chance to get ahead** because of your age
- **Heard negative remarks** related to your older age from a supervisor
- **Laid off, fired, or forced out of a job** because of your age
- **Denied access to training or professional development** because of your age.”<sup>70</sup>

There are more key employee groups that are not called out in this list. Age-related intersectional issues play out in all of them, even if specific data points for each are not readily available (such as for workers who identify as AAPI, Native/Indigenous, Neurodiverse, Disabled, etc.). New research on the intersection of age and these key employee identities is needed.



[68] Perron, R. (2021). *As Economy Improves, Age Discrimination Continues to Hold Older Workers Back: Infographic*. <https://doi.org/10.26419/res.00445.003>.

[69,70] Perron, R. (2018a). *The Value of Experience: Age Discrimination Against Older Workers Persists*. <https://doi.org/10.26419/res.00177.002>.

## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

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# Why Do We Need an ERG Effort Focused on an Age-inclusive Workforce?

## It can build wider support for overall DE&I initiatives.

If you look hard at where employees you target with your DE&I efforts plateau in your organization, you're likely to find issues related to how your workplace forces them to spend time navigating age-related bias instead of focusing on doing the work they love. That is why you need an Intergenerational ERG initiative to understand and address those opportunities to improve your workplace.

An Intergenerational ERG initiative can build wide support for overall DE&I initiatives because it can include any employee from any race, ethnicity, gender identity or orientation, religious identity, or seniority level in the organization.



- An Intergenerational ERG initiative can help your organization understand and address how to make your workplace one where all employees can pursue high-potential opportunities or simply fashion the career they want at all ages and life stages.
- Research shows it is critical to the overall success of DE&I efforts to ensure every employee can join an ERG as a member of the ERG's identity group rather than an ally. This is especially true for middle managers. When managers don't personally identify with other ERG members, they are less likely to see how DE&I efforts support rather than penalize them personally. They are less likely to buy into overall DE&I efforts. This can be hugely detrimental as managers hold organizational positions that allow them to undercut DE&I efforts either consciously or unconsciously.
- Strategically, an Intergenerational ERG could be the only ERG offered where nearly every employee can engage in a role grounded in their own identity (i.e., a straight white male new hire who wants to learn how to succeed as an entry-level employee), rather than their roles as allies (i.e., a straight white male new hire who wants to be an active ally with my Black colleagues).

## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

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# To set up your Intergenerational ERG initiative to successfully boost your overall DE&I goals:

1

Structure the group to welcome and engage members who may also be heavily involved with other ERGs.

For many employees, this may be a 2nd or even 3rd affinity-based ERG.



2

Build the group to engage employees of all ages and career phases.

Your Gen Z and Boomer employees may bond first over age-inclusivity but grow into two-way mentorship relationships over time.



3

Cultivate a leadership team for the Intergenerational ERG initiative that is diverse

(e.g., across gender, race, ability, and age) to signal from the start that it is for everyone and to create the most value for the organization.



## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# The employee populations that most DE&I efforts support are the groups that are hit hardest by age bias and discrimination.

Addressing age inclusion will boost the success of your other DE&I efforts to recruit, retain and promote employees in your key DE&I focus populations. Don't let age-related bias be the reason employees drop out of your promotion and leadership pipeline.

To directly support your core DE&I populations, support new work-life patterns tied to rising career longevity. "People go to school longer, marry later and less often, have children at later ages and expand their working lives beyond the statutory or mandatory retirement age, full-time or part-time."<sup>71</sup>

These issues play out across core DE&I populations in two key ways, offering opportunities to leverage existing ERGs to address the unique ways in which age intersects with other aspects of identity:

1

Today's older adults plan to carry on working well past traditional retirement ages and are positioned to do so given they "are healthier and better educated than any generation before them."<sup>72</sup>



- ❖ Engage the **Women's ERG** to address women's unique financial and career planning needs-- who are likely to live longer, work later, and retire with fewer savings than their male colleagues.
- ❖ Engage the **Black ERG** to discuss how to navigate the experience of age bias within a personal plan to work past the traditional retirement age and identify areas where additional support is needed from the organization.

2

"Work-life patterns around parenting and family caregiving have outsized impacts for most target DE&I populations. Women return to work more often and more quickly after giving birth. Men pause their job to care for their children"<sup>73</sup> and comprise 40% of family caregivers.



- ❖ Engage your **AAPI ERG**, whose members are most likely to live in a multi-generational household, to discuss the strengths and challenges of using your organization's flexible and remote work policies.
- ❖ Engage your **LGBTQ ERG**, whose members are most likely to identify as family caregivers and most likely to be the sole caregiver for their loved ones, to host a benefits review highlighting how all of the benefits and leave policies can be used to support their well-being as caregivers.

[71,72,73] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.49. <https://doi.org/10.1787/59752153-en>.



## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# What is the Return on Investment for an Age-Inclusive ERG Initiative?

The ERG Leadership Research conducted by Elevate and the Institute for Corporate Productivity<sup>74</sup> shows that:

High-performance organizations can achieve a high ROI on their ERG efforts and are:

**3x**

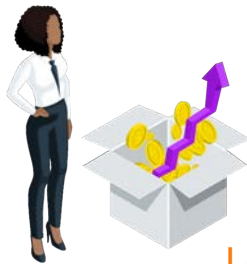
more likely  
to factor leadership  
development into  
ERG budgets

**2.5x**

more likely  
to describe their ERGs  
as experiential career  
advancement and leadership  
development platforms

**1.5x**

more likely  
to provide training designed  
to help leaders align ERG  
goals with the organization's  
strategic goals



Low-performance organizations achieve much lower ROI on their ERG efforts and are:

**3.5x**

more likely  
to say they do not look  
at ERGs as a source  
or training ground for  
future leaders

**2x**

more likely  
to provide  
no training



[74] McGraw, M. (2018, October 23). *New i4cp Report Reveals ERGs as Effective Leadership Development Tool*. Institute for Corporate Productivity (i4cp). <https://www.i4cp.com/press-releases/new-i4cp-report-reveals-ergs-as-effective-leadership-development-tool>



## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

In high-performance organizations, ERG leaders report benefits that accelerate their leadership development<sup>74</sup>



3x

more likely to cite the ability to impact business results strategically

2x

more likely to cite exposure to senior leaders and increased opportunity to build an external reputation

1.5x

more likely to cite inclusion on interesting or challenging projects

ERG leaders in high-performance organizations believe the top benefit of participating in the ERG is that it drives their career advancement<sup>74</sup>

1



82%

cite exposure to and recognition by senior leaders

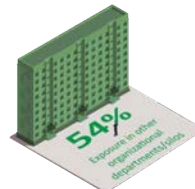
2



58%

cite the opportunity to champion others

3



54%

cite exposure in other organizational departments/silos

4



52%

cite increased opportunity to build an external reputation

The most effective ERGs have sponsors who coach and sponsor group members for ERG leadership roles<sup>74</sup>

2x

the executive sponsor role itself functions as a leadership development opportunity

5x

executive sponsors to observe and source ERG/BRG members for leadership potential

63%

executive sponsors to coach or mentor ERG/BRG leaders



[74] McGraw, M. (2018, October 23). *New i4cp Report Reveals ERGs as Effective Leadership Development Tool*. Institute for Corporate Productivity (i4cp). <https://www.i4cp.com/press-releases/new-i4cp-report-reveals-ergs-as-effective-leadership-development-tool>

## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

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Organizations that achieve high ROI treat their ERG strategy as they would any other strategic initiative. Compared to lower-performing organizations, these high performing organizations are:

**4x**

more likely  
to describe their ERGs as critical  
voices in fostering a more  
inclusive workplace

**2x**

more likely  
to describe their ERG  
as respected by the  
organization's leaders

**2x**

more likely  
to describe their ERG as  
effective to a high or very high  
extent

**3x**

more likely  
to assess or review ERG  
effectiveness in leadership  
development. (Few do this,  
but those that do measure  
promotions and movement)

**2x**

more likely  
to report that ERG leadership  
experience has a positive  
impact on selection/  
succession decisions



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Fuhrmans, V. (2018, January 18). *Companies With Diverse Executive Teams Posted Bigger Profit Margins, Study Shows*. The Wall Street Journal.

## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

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# Put It in Action

1

**Do you need help explaining to your leadership** why you think your organization needs an Age-inclusive ERG initiative? Here is an email template you can use to ask for the initial meeting. You can find it at <https://www.workableconcept.com/blog>. Adding internal data points will make the template even more effective.

Dear [HR leader or C-suite leader],

I'm reaching out because I'd like to schedule a time to share an idea that could help our organization recruit, retain, develop, and promote a diverse range of team members. I just read that 83% of executives believe that creating a more multigenerational workforce would drive their success and growth<sup>75</sup>, yet there is a dearth of action. Our team members of all ages are navigating age-bias challenges that make them more likely to drop out of our pipeline for promotion.

A recent OECD study suggests that "engaging ERGs and their members to understand needs, test solutions and target specific groups that carry heavier loads is a highly effective, efficient way to move towards a multi-generationally inclusive workforce."<sup>76</sup> I think an employee-driven effort to create an age-inclusive initiative in our [ERG/ BRG/ affinity groups] could make a real difference for our colleagues and our organization. Research shows that the ROI of an ERG initiative can be close to 1200%.

Can we find a time to talk about creating an age-inclusive effort in our [ERG/ BRG] initiatives in the next two weeks? I will bring some research data around age inclusion and DE&I efforts, and I will frame a few options for how we could approach this opportunity.

Looking forward to hearing from you,

[Your Name]

2

**Now that you have a meeting on the books, come prepared** for the conversation with your HR leader about leveraging your ERG/affinity group efforts to support age inclusion. To make it easy, use this editable presentation to guide the conversation, found at <https://www.workableconcept.com/blog>

3

**Find data for your current organization or industry to help make your case to become more "age-inclusive."** You can work with HR to send a survey, or just drop a survey link into the best internal messaging channel for your organization. <https://www.aarpinternational.org/growingwithage/resources>.

4

**Work with your HR team or your team leadership to invite a broader group into the conversation** using resources from AARP's Employer Resource Center at <https://www.aarp.org/employers>.

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[75] According to the AARP Global Employer Survey 2020, 83% of employers state that it would be very or at least somewhat valuable to their organisation's success and growth to create a more multigenerational workforce. Executives in large global companies recognise that their organisation would need to undertake more efforts to maximise the full potential that an age-diverse workforce offers, listing age, besides disability, as the area of diversity management that requires most improvement (Forbes Insights, 2011[33])"

[76] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.70. <https://doi.org/10.1787/59752153-en>.

# SINGLE SUCCESS STRATEGY

## The ERG Strategy to “ACE” it

Our ERGs at Shutterstock are our cultural ambassadors, internal think tanks, and special advisors. They help ensure diversity, equity, and inclusion are integrated into the employee experience and company outputs, including products, marketing, and our brand.

Our Generational ERG “Seasons” is committed to giving employees of all ages a voice while bridging gaps between different generations and building awareness of the value and diverse experiences at Shutterstock. Important to Seasons’ success has been a focus on partnerships and intersectionality. Here are some tips on how you can incorporate both into your ERG strategy:

**Awareness:** Gaining attention and leadership buy-in are critical to a successful ERG. Think about how you can bring awareness to other ERGs as you bring awareness to your own. Doing this will help others see how connected we are and that inclusion is in the best interest of everyone.

**Collaboration:** Most ERGs have shared goals and ideas that overlap. Working closely with other ERGs to execute programs can save resources and achieve a greater impact.

**External Partnerships:** Partner with organizations outside your organization that understand your area of interest and can help you achieve greater impact both internally and externally.



**Becky Canterbury**  
Senior Manager, Delivery,  
Co-chair of Seasons



**Meeckel Beecher**  
Global Head of DEI



**Paul Guzzo**  
Manager Image Review,  
Co-chair of Seasons

**Shutterstock**

# SECTION I

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## Unit II

How to Move Your ERGs to Take  
Action on Age Inclusion

### GOAL:

To help you choose  
the best structure  
for building an  
Intergenerational  
ERG initiative in  
your organization.





## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

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# What's the Best Approach to Starting Our Intergenerational ERG Effort?

So, you want to use your ERG efforts to support an age-inclusive workplace. But what is the best way to do it? There is no one best answer. Think carefully about your organization's current state and goals and consider which of these paths is the best fit.

## OPTION 1

### Integrate Age-Inclusive Initiatives within and across all current ERGs

Create an ongoing age-inclusive initiative that builds activities within each ERG and/or a collaborative cross-ERG effort to support all employees within their chosen identity group gathering(s).



## OPTION 2

### Build a dedicated Age Inclusion ERG

This includes starting a new Age Inclusion ERG or broadening your current Early Career and/or 50+ ERGs to become an Age Inclusion ERG that invites employees of all ages and career phases to work together towards age-inclusive workplace practices.



## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

## How Can I Put It in Action?

### Consider the Pros and Cons of Each Approach

On your own or with others, take a moment to consider which pros and cons are most relevant to your organization right now. Keep in mind that the right structure can change over time. For example, you might start with a cross-ERG initiative, then if momentum grows, extend it to build a new ERG. Or you might start by merging your Early Career and 50+ ERGs into one Age Inclusion ERG. Choose what's best for the organization as it is right now.

### OPTION 1

#### Integrate Age-Inclusive Initiatives within and across all current ERGs

##### What is this approach?

Create an ongoing age-inclusive initiative that builds activities within each ERG and/or a collaborative cross-ERG effort to support all employees within their chosen identity group gathering(s).

| Pros |  | Cons  |  |
|------|--|---|--|
|      | It can be easier to get up and running quickly without finding a new budget, executive sponsors, and ERG leaders.  | It does not offer a pathway for employees who do not personally identify with members of another ERG to join the Age Inclusion initiative.  |  |
|      | Ensures that the aspects of age inclusion that are unique to specific affinity groups are openly discussed and addressed.  | Does not engage a dedicated executive sponsor for Age Inclusion, limiting the cultural messaging about senior leadership's support for and personal experiences of age inclusion. |  |
|      | Since age inclusion affects members of all ERGs, ERGs can work together to implement all-organization manager training on topics of age bias and age inclusion best practices.                     | It may be harder to sustain an age inclusion focus for multiple years, as leadership for all ERGs usually changes every 1-2 years and priorities shift with each new leader.      |  |
|      | Allows HR to gather input from each affinity group about how age bias uniquely affects employee engagement, recruitment, retention, and promotion. This can strengthen success across these areas. | All the current ERG leaders for other affinity groups may not be equally willing and able to dedicate some portion of their time and budget to an age inclusion initiative.       |  |
|      | Brainstorm more that are specific to your organization here:   | Brainstorm more that are specific to your organization here:  |  |

##### For Action Now:

- Put an ✖ in the box next to the pros and cons that you think apply to your organization's decision.
- Put a ★ next to the one you think is the strongest driver of how you should make a decision that will work for your organization.

## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

## OPTION 2

### Build a dedicated Age Inclusion ERG

#### What is this approach?

Start a new ERG focused on Age Inclusion, with a broad umbrella to support employees of all types, ages, and career phases-- from new hires through those closer to retirement OR

Expand an existing Young Professionals ERG or 50+ ERG to become an Age Inclusion ERG, with a broader umbrella that includes all employees interested in building an age-inclusive workplace—regardless of their age or generation. The work challenges and professional development experiences can be similar no matter the employee's age so that the same ERG support network can benefit all.

| PROS |  | CONS  |  |
|------|--|---|--|
|      | Every employee has the potential to experience age bias at some point during their time at your organization, and so every employee can see an ERG that could apply to them.     | Early and later-career employees who are already active members of other ERGs may not have the capacity to participate in another ERG.                |  |
|      | It can be a way for those in managerial roles to be actively engaged in DE&I efforts beyond allyship roles – and they can make or break other DE&I efforts in your organization. | It may be harder to find employees who can take on leadership roles to start a new ERG.   |  |
|      | Acknowledges that employees of all ages can experience age-related issues at work, so supports their career holistically as it evolves.  | If it is expanding from an existing ERG, it may create the need to have sub-groups within the ERG (e.g., Early Career Group, On-Ramp Group)           |  |
|      | It has more value in recruiting new employees than an age inclusion initiative embedded in other ERGs.   | If it fizzles out, it may send a message that age inclusion and working at your organization don't actually fit.                                      |  |
|      | Naturally brings together older employees with younger employees. Organic professional mentorship relationships often grow from this mix.  | If your organization can't/ won't increase overall ERG funding, adding a new ERG may decrease funding for all ERGs.                                   |  |
|      | If ERGs provide customer insights for your business, this is a more efficient way to gather employee input in a specific career and life phases as customer segments.            | If ERG members' insights are not used to address challenges or reveal customer insights, they may feel the organization does not value age inclusion. |  |
|      | Brainstorm more that are specific to your organization here:   | Brainstorm more that are specific to your organization here:  |  |

#### For Action Now:

- Put an ✖ in the box next to the pros and cons that you think apply to your organization's decision.
- Put a ★ next to the one you think is the strongest driver of how you should make a decision that will work for your organization.



## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

---

## Make a Choice that Fits Your Organizational Goals

As you decide how to structure your Age Inclusion ERG efforts, some areas are to consider. Print and use this as a meeting agenda first with your small working group and then with your HR leader and/or potential executive sponsor.

- 1 Which approach lets you build on current interest and momentum among employees?
- 2 What are your organization's stated DE&I goals for the coming 1-3 years? How could each structure of Age Inclusion ERG effort advance these organizational goals?
- 3 How established are your current affinity group/ERG efforts? What is a natural growth decision for this next step?
- 4 What are three ways it would be valuable to your recruitment efforts to show that you have a dedicated ERG for employees interested in age inclusion and bias issues?
- 5 Do you have another ERG that is a natural fit for all employees to join (especially managers)? Is this a population that you see has the power to support or undercut your other DE&I efforts? If not in a dedicated Age Inclusion ERG, where else will they join as identity-based members rather than allies?
- 6 How likely are you to sustain Age Inclusion initiatives if they are embedded in other affinity groups?
- 7 How might your approach change as your organization evolves over time?



## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

---

# Schedule a conversation with your HR leader and other key influencers

Now it's time for a follow-up conversation with your HR leader and other key influencers about structuring your Intergenerational ERG effort.

1

Use the discussion questions on the previous page as your agenda to make it easy. Come prepared with your thoughts on each question.



2

Use this simple, editable presentation template, *How to Structure our Age Inclusion ERG Initiative: A Discussion Guide to Use with Leadership*, to conduct the conversation and help you identify the next steps and owners before the end of the meeting.

<https://www.workableconcept.com/blog>



# SECTION I

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## Unit III

How Can I Position ERGs to Influence the Future of Work in My Organization?

### GOAL:

To identify specific ways your ERG can shape your organization's future WorkForce, WorkPlace, and MarketPlace.



## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# FutureForward ERGs

In many organizations, ERGs are increasingly valued as a key means to shape the future of work. Before you dive into your effort to kick off an age inclusion ERG effort, consider how you can ensure your ERG work really drives your organization forward in evolving its approach to its workforce, workplace, and even its marketplace.

ERGs, especially those involving many employees of diverse ages and life stages, are a vibrant arena in which to consider how to build on the past while designing a future where the organization thrives. Use Elevate's Future Forward Tool to self-assess how your ERG works for the future of work.



WorkForce, WorkPlace, and MarketPlace represent the three ERG Impact areas. We defined these three Impact Areas as:

**WorkForce:** Talent Engagement, from Hire to Retire.

**WorkPlace:** Culture, Policies, and Processes.

**MarketPlace:** Customer and Community.

The FutureForward ERGs Model represents these three Impact Areas, as it equips ERGs with key metrics to navigate and apply when shifting into the future of work. In fact, the model anchors itself by the three Impact Areas as categories for these indicators, which represent the past and present ways that ERGs work, yet intertwine them with a Future Orientation. Honor the past and forecast into the future with the FutureForward ERGs Model as your ERGs integrate the timeless best practices with the timely next practices. The infinity symbol reflects the model's intent for you to Syn**ERG**ize both the greatest and latest into the future.

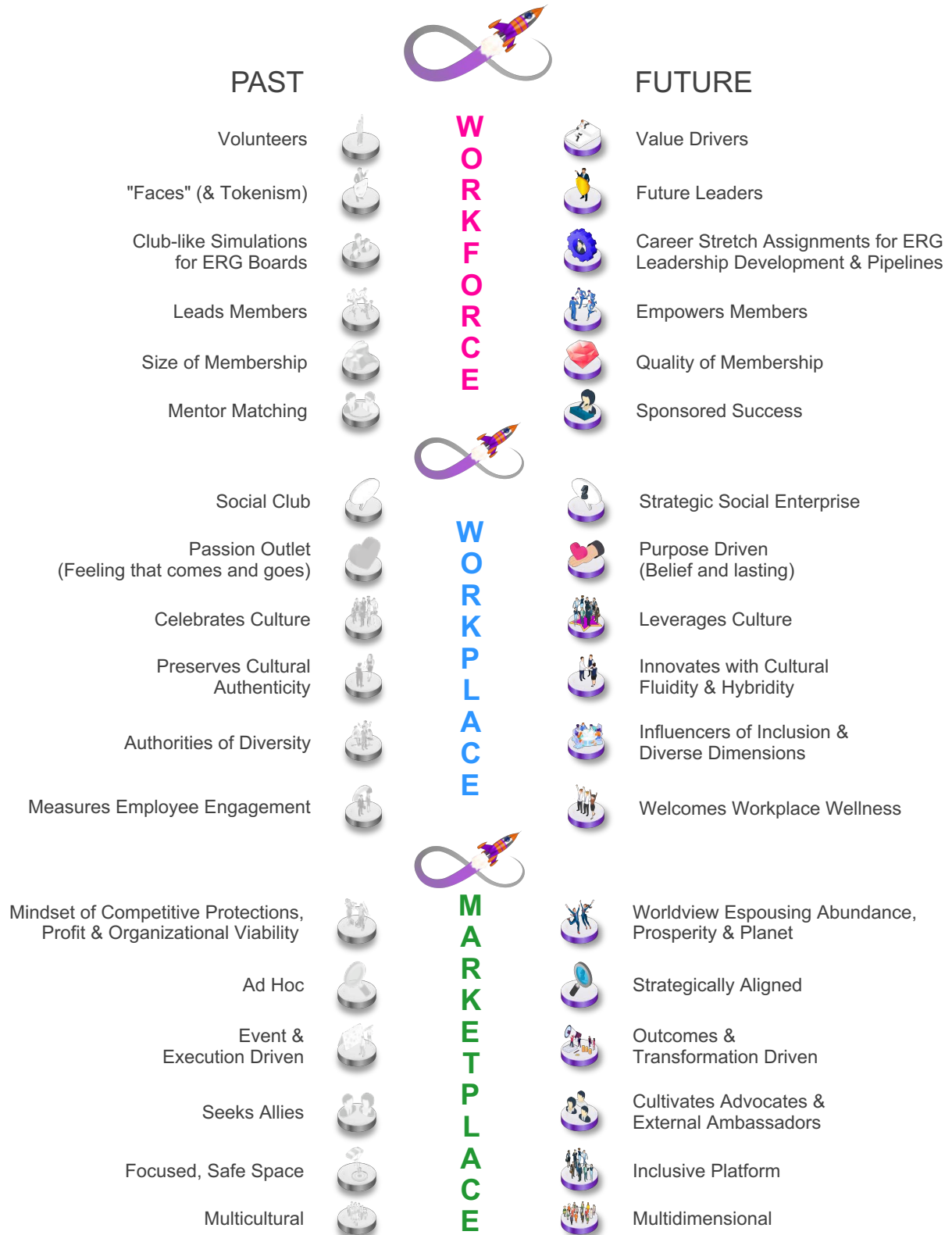


High-performing ERGs who leverage Future Orientation to envision and imagine your future selves in future contexts that integrate past and future—all to advance the positive Impact Areas of WorkForce, WorkPlace, and MarketPlace.

## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

# FutureForward ERGs



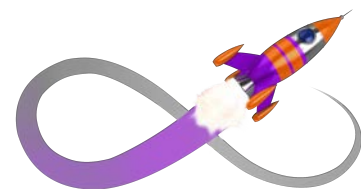
## SECTION I

### Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

---

## Now, look for how to use a Future Forward mindset in your ERG leadership work:

- 1 ASK FOR HONEST FEEDBACK.**  
Feedback will make you better. Understanding the positive and negative perceptions of others have of you is an excellent way you'll learn and grow.
- 2 ENCOURAGE.**  
Individuals are a mixture of both fixed and growth mindsets. Look for ways to foster the latter.
- 3 ASK FOR HELP WHEN NEEDED.**  
No one can do it all. Exposing your human limitations to someone shows that you're willing to be vulnerable to them, fostering growth. We can all use help throughout our lives.
- 4 TAKE CALCULATED RISKS.**  
Move beyond your comfort zones and explore new ways of doing things. Don't be afraid to be a risk-taker when you try to venture out, which can lead to innovation and creativity.
- 5 LOOK AT ALL ANGLES.**  
Every life experience or event – be it something positive or negative – has many angles you can learn something. Try to view the world through different lenses or perspectives.
- 6 BE WILLING TO LEARN.**  
See learning as a process and not as an imposition. Do not just submit to a learning experience just because something is expected out of you. Enjoy the process. Opening up your mind to new ideas allows you the opportunity to change what you think and how you view your surroundings.
















## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

### Put into Action

Toward which characteristics are your ERG more likely to lean? Mark the circle.



| PAST   | <b>WORKFORCE</b>   | FUTURE  |
|--|--|---|
|   | Volunteers <span style="margin-left: 20px;">1 2 3 4 5</span>                           | Value Drivers <span style="margin-left: 20px;"></span>   |
|   | "Faces" (& Tokenism) <span style="margin-left: 20px;">1 2 3 4 5</span>                 | Future Leaders <span style="margin-left: 20px;"></span>  |
|   | Club-like Simulations for ERG Boards <span style="margin-left: 20px;">1 2 3 4 5</span> | Career Stretch Assignments for ERG Leadership Development & Pipelines <span style="margin-left: 20px;"></span> |
|   | Leads Members <span style="margin-left: 20px;">1 2 3 4 5</span>                        | Empowers Members <span style="margin-left: 20px;"></span>  |
|   | Size of Membership <span style="margin-left: 20px;">1 2 3 4 5</span>                   | Quality of Membership <span style="margin-left: 20px;"></span>   |
|  | Mentor Matching <span style="margin-left: 20px;">1 2 3 4 5</span>                      | Sponsored Success <span style="margin-left: 20px;"></span>  |



| PAST  | <b>WORKPLACE</b>   | FUTURE  |
|---|--|---|
|  | Social Club <span style="margin-left: 20px;">1 2 3 4 5</span>                                  | Strategic Social Enterprise <span style="margin-left: 20px;"></span>                   |
|  | Passion Outlet (Feeling that comes and goes) <span style="margin-left: 20px;">1 2 3 4 5</span> | Purpose Driven (Belief and lasting) <span style="margin-left: 20px;"></span>           |
|  | Celebrates Culture <span style="margin-left: 20px;">1 2 3 4 5</span>                           | Leverages Culture <span style="margin-left: 20px;"></span>                             |
|  | Preserves Cultural Authenticity <span style="margin-left: 20px;">1 2 3 4 5</span>              | Innovates with Cultural Fluidity & Hybridity <span style="margin-left: 20px;"></span>  |
|  | Authorities of Diversity <span style="margin-left: 20px;">1 2 3 4 5</span>                     | Influencers of Inclusion & Diverse Dimensions <span style="margin-left: 20px;"></span> |
|  | Measures Employee Engagement <span style="margin-left: 20px;">1 2 3 4 5</span>                 | Welcomes Workplace Wellness <span style="margin-left: 20px;"></span>                   |














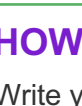

## SECTION I

Why Will an Intergenerational ERG Initiative Drive Your Organizational Goals?

### Put into Action

Toward which characteristics are your ERG more likely to lean? Mark the circle.



| PAST   | MARKETPLACE   | FUTURE   |
|--|---|--|
| <br>Mindset of Competitive Protections, Profit & Organizational Viability | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 | Worldview Espousing Abundance, Prosperity & Planet  |
| <br>Ad Hoc  | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 | Strategically Aligned                               |
| <br>Event & Execution Driven  | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 | Outcomes & Transformation Driven                    |
| <br>Seeks Allies  | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 | Cultivates Advocates & External Ambassadors         |
| <br>Focused, Safe Space  | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 | Inclusive Platform                                 |
| <br>Multicultural   | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 | Multidimensional                                  |

### HOW FUTUREFORWARD IS YOUR ERG?

Write your total points for each section.

**WORKFORCE** = \_\_\_\_\_

**WORKPLACE** = \_\_\_\_\_

**MARKETPLACE** = \_\_\_\_\_

**TOTAL POINTS** = \_\_\_\_\_

### THE POINT SYSTEM

#### 18-50 POINTS

Start some systems and changes to jumpstart your ERG's journey as a FutureForward ERG.

#### 51-79 POINTS

Your ERG is on its way to being FutureForward. Keep the momentum going!

#### 80-90 POINTS

Your ERG is FutureForward. Keep it up!

### DISCUSSION QUESTIONS

- 1 How does the Future Forward Tool provide you with a broader understanding of your organization's strategy?
- 2 Which actions will your ERG prioritize in the near future? How can these help your ERG strategically?
- 3 What can your organization do to support your ERG's growth, and how can you access that support?
- 4 What is the first step your ERG should take to ensure growth?



# SINGLE SUCCESS STRATEGY

## “C”-ing across Generations

Back in the mid-aughts, and even before the name “Elevate” described our consortium, Spectrum Knowledge led an initiative called “Classrooms to Boardrooms.” Working across industries to conduct research and training, we learned key lessons to unlock the best from all generations.

- **Continuity Theory.** This body of research posits that aging adults maintain similar behaviors and lifestyles to their past youth. We have more in common across generations than differences. What fundamental continuities can your ERG leverage to benefit the workforce across generations?
- **Cyclicity.** Humans in modern history have life cycles, from childhood to young adult phases and middle age and elderly years—these exist across all generations. Although life spans have increased and contexts change, there remains a cyclicity of life, from developing to declining years. Much like seasons, how can ERGs gain actionable insights from these cycles?
- **Contextuality.** Carefully consider each generation’s context, from time (think history) to space (think geography), as well as key events and megatrends. These contexts shape each generation’s experiences and worldviews.
- **Co-Creation.** Culminate your intergenerational ERG journey as you co-create common solutions to common challenges. Cross age and life-cycle borders on your sojourn as you co-create and build bridges for future generations.



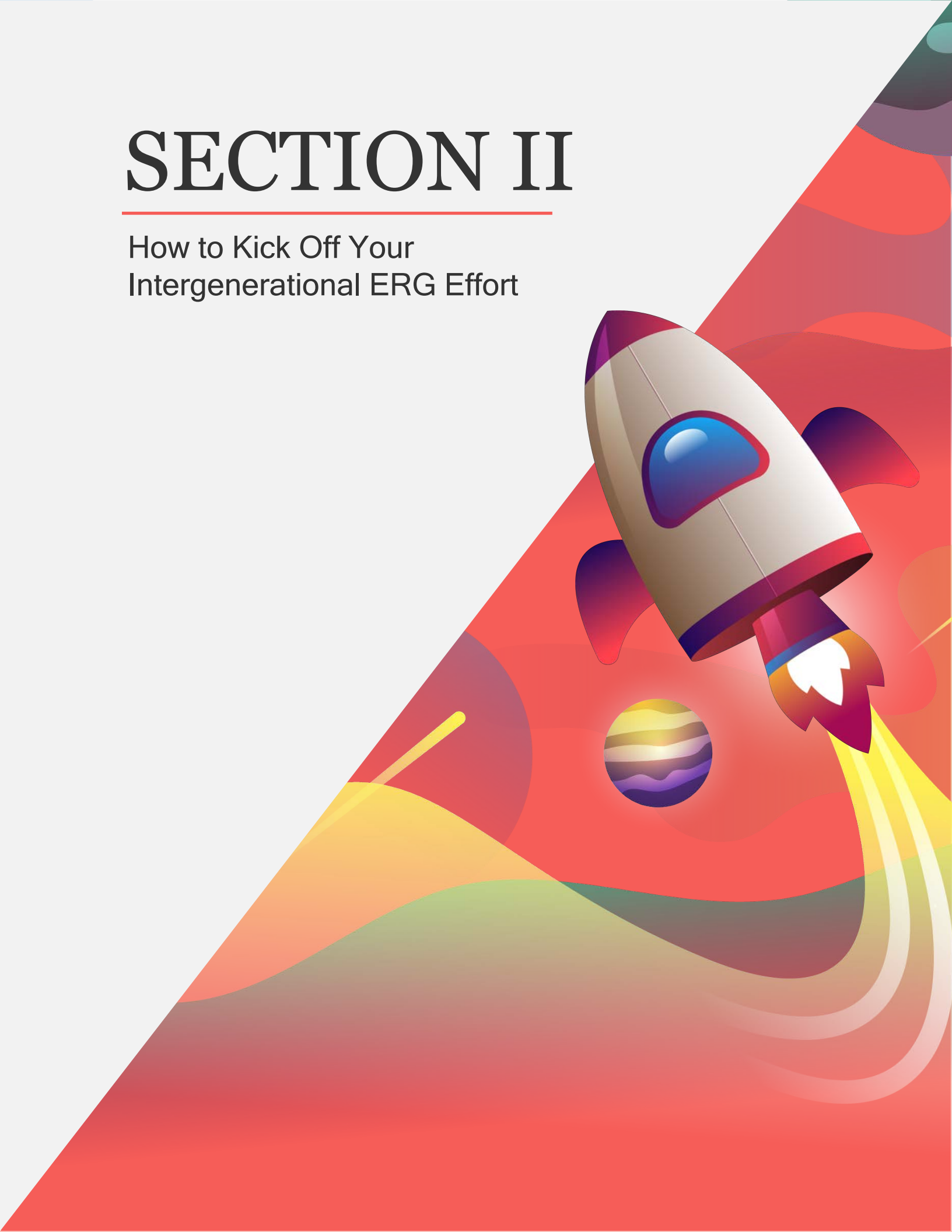
Vu H. Pham, Ph.D.  
Chair of Elevate  
CEO of Spectrum Knowledge

**Elevate, and  
Spectrum Knowledge**

# SECTION II

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How to Kick Off Your  
Intergenerational ERG Effort



## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

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## In This Section

So, you have decided you want to create an Age Inclusion ERG effort, and you have ideas about how you want to structure it—either as a dedicated Age Inclusion ERG or as an age inclusion effort you will embed into all other ERGs. Now, the question is, “how do we get started?”

1

First, consider some best practices for ERG start-up and sustainability from Elevate.



2

Second, design your first year of initiatives and/or events to create value for your organization that will inspire your leaders to invest more heavily in year 2.

Use our suggestions for Caregiving ERG efforts that can develop the careers of your working parents and family caregivers.



# SECTION II

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## Unit IV

### Keys to Success for a Cross-ERG Initiative

#### GOAL:

To provide best practices for you to develop a plan to collaborate across your current ERGs to launch an Age Inclusion initiative.



## SECTION II

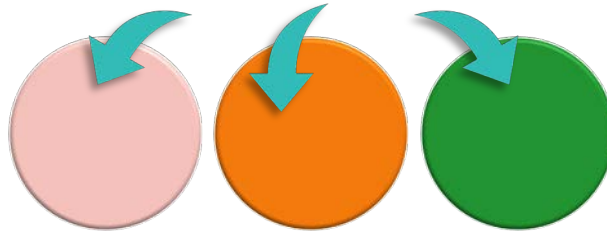
### How to Kick Off Your Intergenerational ERG Effort

## Organizations Increasingly Expect ERGs to Collaborate toward Shared Goals

ERG leaders have been asked to collaborate with one or more other ERGs towards a shared goal in recent years. Cross-ERG collaborations have become common on issues such as Courageous Conversations on Race, supporting working parents, philanthropic efforts, and more.

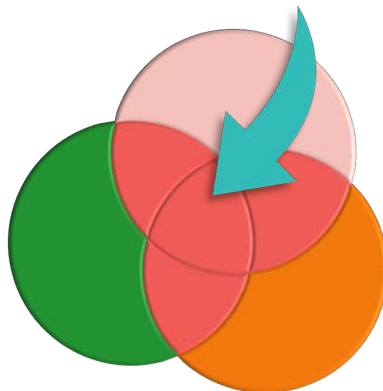
Age inclusion is a natural fit for cross-ERG collaboration because it is likely that members within every ERG not only navigate age bias but are also experiencing various life and career stages. ERGs can easily leverage the work to prepare for a specific conversation or program on age inclusion to:

### 1 Host a set of conversations within specific ERGs



For example, run a program on detecting and interrupting age bias first in an AAPI ERG, then PRIDE ERG, then Latinx ERG, etc.

### 2 Host a single program that invites members of multiple ERGs

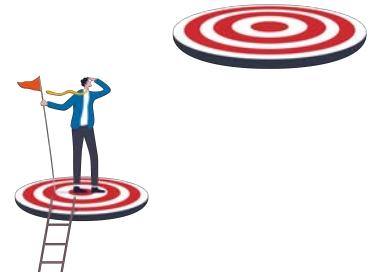


For example, run a program to detect and interrupt age bias with a group comprised of members of the AAPI, PRIDE, and Latinx ERGs.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

Many organizations will prefer to start with an age inclusion initiative within their existing ERG(s) as their first step. Over time, working with all existing ERGs can create the broadest reach and the greatest impact across the organization.



As you work with other ERGs to create a shared initiative, use these best practices as recommended by Sherita Lee, Director, Learning & Development, Talent Management at Merck. As the Global Co-Lead, League of Employees of African Descent (LEAD), she co-led a successful cross-ERG collaboration. LEAD worked with the Hispanos Organization and the Native American and Global Indigenous People EBRGs to foster awareness of health disparities and communicate the importance of inclusion of people of color in awareness education, prevention, and treatment of COVID-19. She considers these the keys to success in cross-ERG collaboration:

## THE 8 KEYS TO SUCCESS

- 1 ESTABLISH COLLABORATION STANDARDS**
  - Establish EBRG leading the effort—rotate the lead role but have a strong alliance.
  - Establish Meeting Cadence
  - Enlist Project Manager Support (Special Assignment)
  - Who will be on the team?
  - EBRG Leader +1 + Communications
- 2 INVOLVE BUSINESS AND OTHER STAKEHOLDERS**
  - Leverage assets/strategies within the enterprise
  - Potential for budget support
  - Use members of EBRG a during program
- 3 SPONSOR ENGAGEMENT & SUPPORT**
  - Use sponsors to support and create advocacy among other leaders.
  - Sponsor visibility during events helps to evolve the culture
- 4 INTERNAL & EXTERNAL SUBJECT MATTER EXPERTS**
  - Involve in the planning and program
  - Network and idea generators
- 5 INVOLVE EXTERNAL PARTNERS**
  - Bring Outside In perspectives
  - Community Partners
- 6 COMMUNICATIONS**
  - Ensure a person from each Communications team is connected to the work early
  - Increase participation with a solid comms plan and publicity
- 7 TECHNOLOGY**
  - Ensure you maximize tech tools (chats, polls, producer for large events, producer role for smaller)
- 8 PLAN FOR INTERNAL APPROVALS**
  - Ensure you understand your internal policies and compliance rules



# SINGLE SUCCESS STRATEGY

## First Generation Professionals (FGPs) Across Generations

This critical and pioneering Toolkit provides much-needed insights on intergenerational issues, so let's spotlight a valuable complement to this and discuss First Generation Professionals (FGPs). Who are FGPs? When I served in the Senior Executive Service at the United States Department of Commerce, we crafted this statement:

"First Generation Professionals are *Trailblazers*. They are one of the first in their immediate families to enter the professional work environment (i.e., parents' careers consisted of traditional blue-collar positions or those not requiring a college education). They are professionals with varying socio-economic backgrounds, life experiences, skills, and talents that diversify our workforce, *and when leveraged*, they help agencies optimally serve our diverse public."

FGPs exist within every generation (Traditionalists, Boomers, Gen X, Millennials, and GenZ), as someone will always be "the first" within their families to traverse into new spaces. What can we do to spotlight and support FGPs?

- **Share the Unwritten Rules.** Share your insights and wisdom on how to charter a career path by illuminating the unwritten rules of your organization. It's challenging to gain organizational savvy and learn the invisible and intangible rules, so imagine raising awareness of each organization's idiosyncrasies? Help FGPs with universal and specific unwritten rules, and you will have a grateful ally and, hopefully, friend.
- **Score Them Some Social Capital.** Many FGPs come with smaller networks in these newer professional settings. Invest some social capital in them by introducing them to key folks who can support their adjustment and careers. These can range from other colleagues, mentors, and internal and external resources to your organization.
- **Unlock FGPs as Force Multipliers.** What happens when you learn about the unique experiences? You can unlock contexts, experiences, and knowledge to enhance your organization, its stakeholders, and diverse communities. Unlock this untapped potential.



**Tinisha L. Agramonte**  
Chief Diversity Officer

**Motorola Solutions**



# SECTION II

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## Unit V

Keys to Success to Launch a New  
Dedicated ERG



### GOAL:

To provide best practices for you to develop a plan to create an Intergenerational ERG. You might do this as a new ERG or by extending and/or combining existing ERGs focused on specific ages or career phases (e.g., Early Career, Mature Workers, etc.).

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

# Organizations Increasingly Expect ERGs to Collaborate towards Shared Goals

You may decide that an ERG specifically focused on age inclusion is a better fit for the work you want to accomplish. To help you create an Intergenerational ERG dedicated to age inclusion, be sure you consider each step in Elevate's ERG Startup Stairway Tool:



Use the Startup Stairway to guide decision-making. With your group, choose the most relevant questions listed for each step. Discuss with your startup team, summarize your thoughts, and use that summary to frame discussions with key organizational decision-makers. Remember these tips:

- 1 Foundations Forge Freedom.** If your ERG startup team focuses diligently on each step in the Stairway, your time investment in the short-term will afford long-term flexibility built on firm foundations.
- 2 Customize Your Stairway.** At each step, add questions and quality checklists tailored to your organization's strategy and your own ERG's needs.
- 3 Solve A Specific Problem.** The best startups focus on a customer problem. Your ERG should focus on a specific problem core to employees with caregiving responsibilities. This problem-solution orientation will ensure that your ERG provides maximum value for a major need, seeding future success.
- 4 Prepare To Pivot.** The Stairway provides foundational guidance. Once you launch or refine strategies, your ERG will need to adapt to learn from mistakes and successes.
- 5 Stakeholders Ensure Success.** Make time for discussions with key stakeholders, such as your Diversity & Inclusion Advisory Council, ERG Program Manager/D&I Team, and/or your ERG Executive Champion/Sponsor. These stakeholders will ensure that your ERG aligns with broader strategic goals and secures resources.

You can find more detail on each step in The ERG Startup Stairway Tool in Unit III of the Caregiving ERG Toolkit at <https://www.aarp.org/content/dam/aarp/caregiving/pdf/2020/caregiving-erg-toolkit.pdf>

# SECTION II

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## Unit VI

How to Plan a Successful First  
Year for Your Cross-ERG Initiative

### GOAL:

To provide best practices  
for you to develop a plan to  
collaborate across current  
ERGs on an Intergenerational  
Workplace initiative.



## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

# Design Your First Year to Show Clear, Measurable Success

You have momentum for your organization to consider starting an Age Inclusion ERG effort. Congratulations! What should be your kick-off effort, and how do you build momentum in your first year?

Here are five best practices, each with a tactical Tool to help you start strong. Consider it wisdom passed down from other ERG leaders who have been there. Think about the long-term now and pace yourselves!



1

## BEST PRACTICE #1

Build on The Base You've Got—with an Intersectional Lens

### Best Practices

- **Find the organic network that is already happening** among employees interested in how their age and generation affect their workplace experience and scale it up into an internal messaging channel or Intergenerational page on your employee portal. Look in it to find people who can help lead Age Inclusion ERG events or who can be a speaker at an event you help to organize.
- **In year One, look for 1-2 other ERGs** to collaborate with at the start. In year Two, you can grow a successful collaboration initiative to engage all of the affinity groups in your organization.

### Put It In Action

Use this to identify other ERGs that are strategically valuable as your first partners for Year 1:

Think carefully about which other ERGs will be unique and successful partners in an age-inclusion ERG effort. You'll want to consider the factors: Which ERGs have known active leadership, a history of innovation/creating new programs, some overlap of members with your own ERG, and/or an engaged executive sponsor who can promote your cross-ERG effort?

## SECTION II

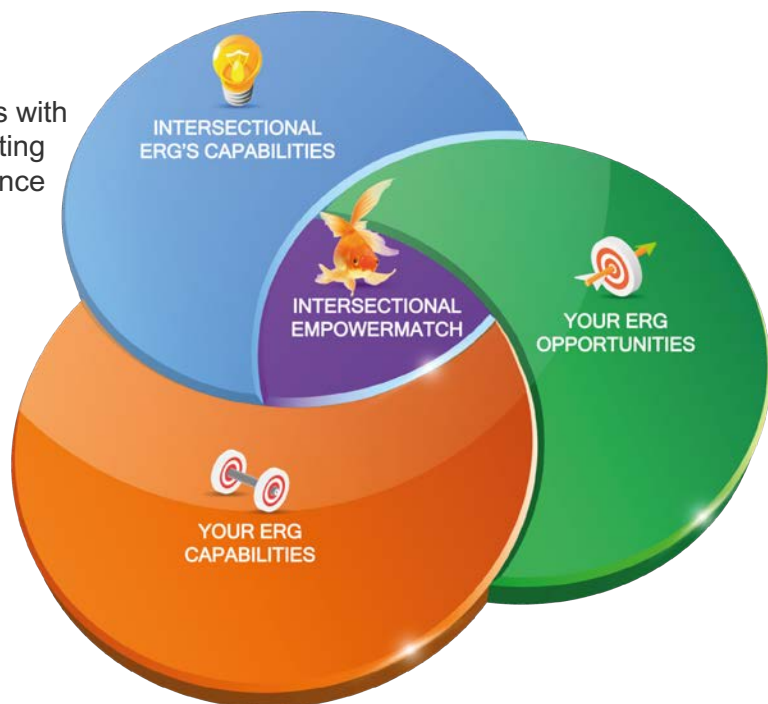
### How to Kick Off Your Intergenerational ERG Effort

But also consider intersectionality. We know each person can have an intersectional identity (for example, a first-generation 50-year-old AAPI woman who has a hearing disability and is a caregiver for her wife lives an experience shaped by all of these aspects.) We also need to think of ERGs as a context where intersectionality plays out. (For example, members of the LGBTQ, Veterans, Parent/Caregiver, and Abilities ERGs may all struggle with how and when to disclose that aspect of their lived experience. These ERGs are then uniquely suited to collaborating around the issue of workplace disclosure.)

You can visualize this idea with Elevate's **Intersectional Empowermatch** concept:

The Intersectional Empowermatch presents a three-in-one Tool that:

1. Leverages intersectionality intentionally
2. Matches your ERG's strongest "Capabilities" with the best "Opportunities"
3. Empowers your ERG stakeholders with the convergence of these intersecting capabilities and opportunities—hence the name Intersectional Empowermatch!




Envision the three circles of your ERG's Intersectionality, Capabilities, and Opportunities as a trio of magnifying lenses that focus on aggregate and empower one another. It functions as a super laser that multiplies the powers of each. Consider intersecting multiple ERG affinities beyond generations, such as those that emphasize ethnic, military, disabilities, sexual orientation, or other areas. This action augments and expands your ERGs' efforts. Now inventory your ERG's top Capabilities, as you want to play your strengths, which inherently places you in a flow state and positive positioning to perform at your peak. Third, match the top Capabilities with the ideal Opportunities for your ERG to make an impact in terms of magnitude, priority, scale, and others that mean the most to you. Follow the Tool worksheet instructions with these insights in mind, and you'll empower your stakeholders as you intersect and match!

## SECTION II

### Unit VI: How to Plan a Successful First Year for Your Cross-ERG Initiative

## WORKSHEET

| Intersectional ERG's Capabilities  |   |  |
|--|---|--|
| <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol> |   |  |
| <b>Your ERG's Capabilities</b>   |  | <b>Your ERG's Opportunities</b>  |
| <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol> |   | <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol> |
| <b>Strategic Plan for Empowering Actions</b>                             |   |  |

## INSTRUCTIONS

- 1 List your top 3 ERG Capabilities in the **orange box**.
- 2 List your top 3 ERG Intersectional Capabilities on the **blue box**.
- 3 List the corresponding ERG Opportunities on the **green box** based on what you have listed on the **blue** and **orange** boxes.
- 4 Align your ERG Capabilities that best match a specific opportunity and note Empowering Actions for each of your top 3.
- 5 List in the **purple box** the strategic plan and action steps on how your team could synergize their capabilities to accomplish the ERG's opportunities. Then Empowermatch!

## DISCUSSION QUESTIONS

- 1 How can your ERG promote Empowermatching among members and leaders?
- 2 How can you create Empowering Actions within and outside of your ERG as an ERG leader?
- 3 What are the WorkForce, WorkPlace, and MarketPlace benefits when employees are Empowermatched?
- 4 How can your ERG become a vessel for empowering employees?
- 5 What are the challenges to Empowermatching members and colleagues in general?



## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## 2

## BEST PRACTICE #2

### Be "Assertively Inclusive"

#### Best Practices

- **Consciously build your team.** Once you have identified a small base of ERG members/leaders interested in age inclusion, intentionally broaden it. Harvard Business Review recommends that you "be assertively inclusive". [Your collaborators should] come in all packages. They are [from all generations,] male, female, gay, straight, from every conceivable background, and all parts and levels of the organization. And as a network lead, it's your job to make sure that every one of [them] gets the message, loud and clear, that "You are welcome here. This is for *you*."
- **Inclusive communication.** Start by ensuring the cross-ERG group's leadership is demonstrably diverse; prospective members will want to "see themselves" in the network's composition. Make sure to keep communications demographically neutral: In emails, for example, specify that "this group/seminar is open to every interested team member at [organization name]." And don't be afraid to get personal: Walk down the hall and invite that marketing guy in his 50s and the freshly graduated programmer to join you at the group's next meeting. Remember: The broader and deeper your network is, the stronger it will be.
- **Relevant content for all generations:** Make sure you choose a blend of efforts, events, and initiatives that will bring a wide range of people from across your organization into the conversation, especially those who work virtually, in global offices, and other non-headquarters locations. Before you send out a communication or finalize an agenda or program, do a quick check to ensure employees from all generations, from Boomers through Gen Z, will find something that resonates.



#### Put It In Action

Use this Tool to do a self-check on how assertively inclusive your core team is and who will be leading the cross-ERG initiative on age inclusion in Year One:

Now, consider ALL the diversity dimensions present in your own ERG. Your age inclusion ERG effort will focus on the age dimension of diversity but choose 1-3 others that you believe intersect strongly with the age-based experiences of employees at your organization.

This will point you towards which other ERGs you should consider as collaboration partners on your cross-ERG effort and also help you think more broadly about whom to recruit to help you lead your age-inclusion ERG effort.

[77,78] Dowling, D. (2018, November 12). *How to Launch a Working Parents' Support Group in Your Organization*. Harvard Business Review. <https://hbr.org/2018/11/how-to-launch-a-working-parents-support-group-in-your-organization>



## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## Diversity Dimensions



Think of intersectionality as infinite and with imaginative identities as you integrate its many dimensions. Many people consider the “optics” and visible areas of diversity, particularly age, gender, and race. Diverse identities encompass more acquired and inherent forms than invisible and intangible ones. The Intersectional Integrator furnishes you with this multitude of diverse elements for your ERG to envision even grander and more granular forms of intersectionality. Apply this Tool to create complementary, supplementary, and hybridized combinations and collaborations. Unlock the potential, and unleash the power of intersectionality.

## SECTION II

### Unit VI: How to Plan a Successful First Year for Your Cross-ERG Initiative

## WORKSHEET

**ERG Initiative:** \_\_\_\_\_

### DIVERSITY DIMENSIONS

- ☐ Age
- ☐ Appearance
- ☐ Caregiver/Parent Status
- ☐ Country Origin
- ☐ Educational Background
- ☐ Ethnicity
- ☐ Family
- ☐ Gender Identity
- ☐ Income
- ☐ Job Type/Role
- ☐ Marital Status
- ☐ Personal Values
- ☐ Physical Attributes
- ☐ Race
- ☐ Recreational Habits
- ☐ Religion
- ☐ Sex
- ☐ Sexual Orientation
- ☐ Thinking Styles
- ☐ Work Experience
- Add More Diversity Dimensions
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### VALUE TO ERG INITIATIVE

## INSTRUCTIONS

- 1 Write your ERG initiative.
- 2 Self-assess your team's core diversity. Put a checkmark on each Diversity Dimension that is in your group.
- 3 Consider adding more Diversity Dimensions to your team to increase the diversity of ideas.
- 4 Write in the box how each ERG Diversity Dimension adds value to your ERG Initiative.

## DISCUSSION QUESTIONS

- 1 What is a milestone that your ERG has hit lately that marked maturity?
- 2 What key action should your ERG do first to ensure growth?
- 3 What are some action items to progress further?
- 4 How can your ERG prevent stagnation?

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

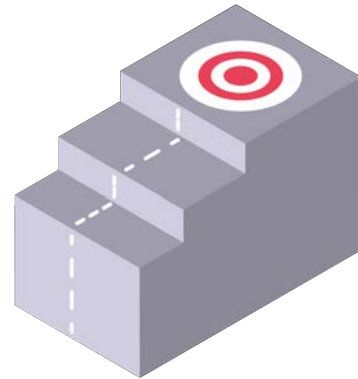
3

## BEST PRACTICE #3

### Be “Brutally Focused on One Goal”

#### Best Practices

- **Quantify your impact.** Showing results in Year One is key to building momentum and securing more resources for Year Two (even on a small scope of work for the first year.)
- **Define one goal.** Choose one specific impact goal for this year, so you know what you want members to learn and how this will add value to your organization. Align your ERG goal with the culture and mission of your organization. Then define how you will measure if you are successful in reaching your goal. All year, use it as a firm criterion for what initiatives and events you plan. Make sure everything you choose to do in your first year builds towards your one consistent goal.
- **Identify value-driven activities.** Focus on the types of ERG activities that executives see as most valuable, especially in Year One, as you build buy-in and advocacy among senior leaders and your Executive Sponsor(s).



#### Put It In Action

Executives rank these four types of ERG activities as the most valuable). Which do YOU see as most valuable for your Intergenerational ERG effort? Rank them from 1st to 4th.

Employee Development

Rank # \_\_\_\_\_

e.g., Host developmental series, assimilation and mentoring initiatives, send members to national conferences to learn industry success practices

Talent Acquisition  
Recruitment

Rank # \_\_\_\_\_

e.g., Host a technical talk, support recruiting event, refer candidates in critical fields

Support Company  
Initiatives

Rank # \_\_\_\_\_

e.g., Innovation, affordability, quality, acclimating new hires

Leverage Identity to Help  
Company Win New  
Business

Rank # \_\_\_\_\_

e.g., Open new market, support global Request for Proposal (RFP), capture grants, and fundraise

When your team has discussed and chosen which ONE TYPE OF ERG ACTIVITY is the MOST important for your first year, write it here: \_\_\_\_\_

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

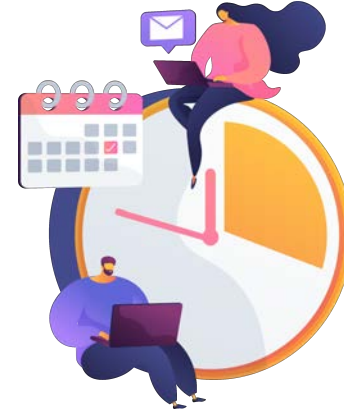
#### 4

## BEST PRACTICE #4

### Stick to a Reasonable Scope

#### Best Practices

- Stick with the optimized range of 6 or fewer events per year. Resist the urge to plan monthly events!
- Only plan as many events as you can make wildly successful with solid content and strong attendance from core members and senior leaders/ sponsors. Leave people wanting more.



|                                  | OPTIMIZED  | TYPICAL   |
|----------------------------------|--|---|
|                                  | 1-6 Events   | 12+ Events  |
| Value to employees               | <ul style="list-style-type: none"><li>• High perceived value and quality per event,</li><li>• Smaller number of events motivates participation in all</li></ul>  | <ul style="list-style-type: none"><li>• Low perceived value and quality per event.</li><li>• Small group of dedicated attendees limits networking</li></ul>               |
| Value to managers of ERG leaders | <ul style="list-style-type: none"><li>• See participation as valuable professional development for team members and value for workplace culture.</li><li>• Advocate for team members to join and lead ERGs</li></ul> | <ul style="list-style-type: none"><li>• May view ERGs distraction from performance.</li><li>• May deny time for ERG leader involvement.</li></ul>                         |
| Utilization by ERG members       | <ul style="list-style-type: none"><li>• Feel that participating in high-value ERG initiatives advances career and is personally sustainable.</li><li>• Employees step up to lead ERG in following years</li></ul>    | <ul style="list-style-type: none"><li>• Potential to feel overworked</li><li>• Reluctant to take on ERG leadership roles because it distracts from their career</li></ul> |
| Utilization by Executives        | <ul style="list-style-type: none"><li>• Likely to participate due to effective use of their time and high employee engagement</li></ul>  | <ul style="list-style-type: none"><li>• Disengaged because they are requested too often</li></ul>   |

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## Put It In Action

Edit this template to help you focus your efforts

### Our brutally focused goal for Year One is to:

[Mark the ONE your team chose in **Page #60**]



Employee  
Development



Talent  
Acquisition  
Recruitment



Support  
Company  
Initiatives



Leverage Identity to  
Help Company Win  
New Business

Assume you will have a program/activity roughly once per quarter.

|   | Activity Q1 | Activity Q2 | Activity Q3 | Activity Q4 |
|---|-------------|-------------|-------------|-------------|
| Describe the program/activity type  |             |             |             |             |
| What measurable impact from this program/activity shows you are achieving your ONE brutally-focused goal this year? |             |             |             |             |

Total measurable impact towards our one brutally-focused goal at the end of year one:

[Add up or list all measurable impacts from each quarterly program]

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

# 5

## BEST PRACTICE #5

### Engage Your Executive Sponsor(s) Strategically, and Create Value for Them

#### Best Practices

- **Be strategic about engaging your Executive Sponsor** so that you use their time and social capital in the organization to create maximum value for your Intergeneration ERG effort—and for your sponsor. Use the Sponsor Alignment Matrix to craft how to engage your sponsor best.
- **Don't have an Executive Sponsor yet? Don't worry.** Check out the ERG Leadership Agreement Tool on page 47 of AARP's Caregiving ERG Toolkit. This will help you develop a clear view of the leadership roles that will make your ERG effort successful: the ERG Leader, the ERG Leader's Supervisor, and the ERG's Executive Sponsor. You need to know what you're asking of each person, and they need to understand what they agree to do and for how long. Find it in Unit IV here: <https://www.aarp.org/content/dam/aarp/caregiving/pdf/2020/caregiving-erg-toolkit.pdf>



#### Put It In Action

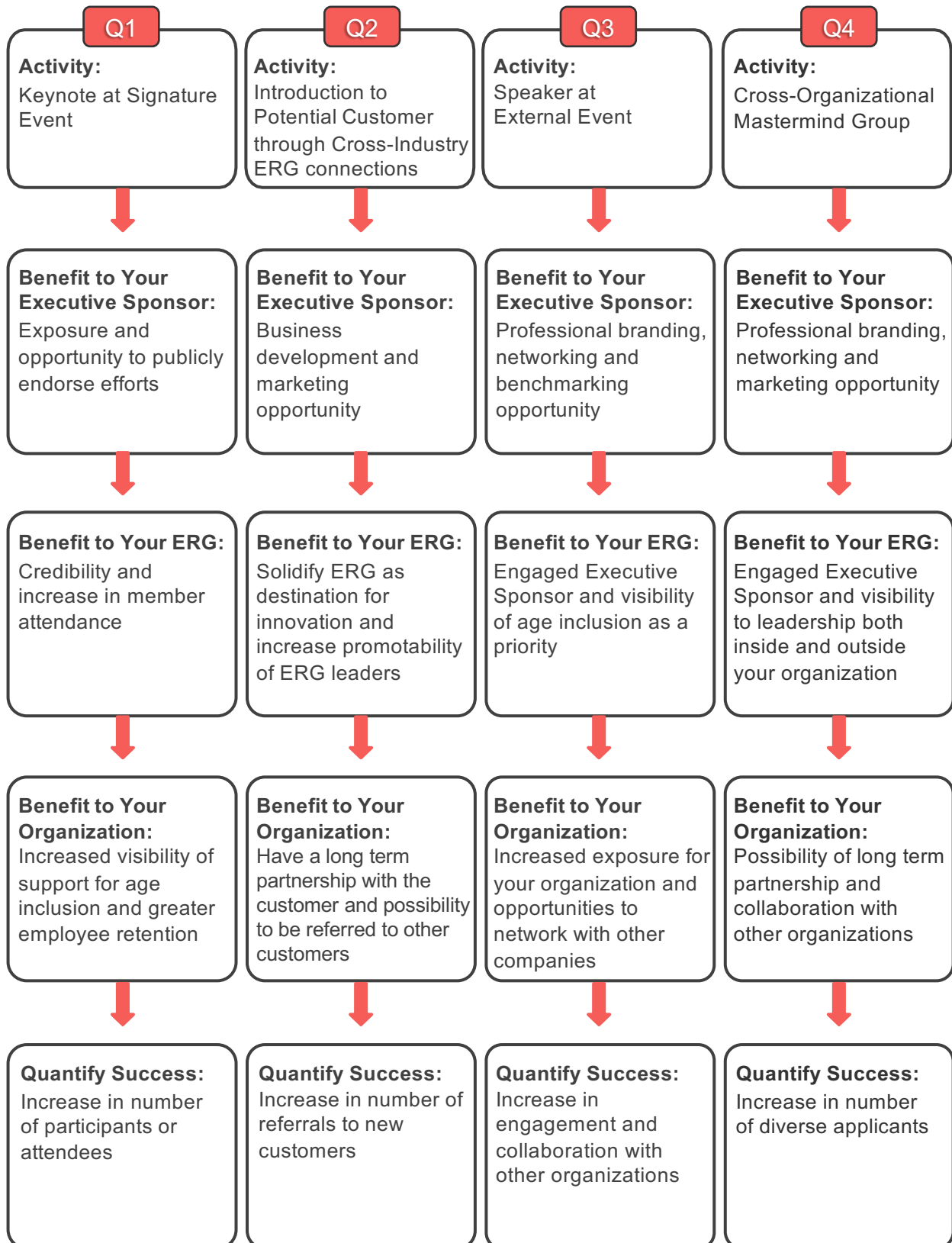
Create your Sponsor Alignment Matrix here. The steps are:

1. **Define the Activities** where you will ask your sponsor for their time and effort. Copy each of the activities you designed in the Stick to a Reasonable Scope section earlier into the Activity boxes below.
2. **Define the Benefit(s) to your Executive Sponsor** of each activity.
3. **Define the ERG Benefit(s)** of each activity.
4. **Define the Organization Benefit(s)** of each activity. Try to attach these to your organization's clear priorities and DE&I goals for this year.
5. **Define Success** and how you will measure it.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

#### Sample Sponsor Alignment Matrix





## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

Design your own **Sponsor Alignment Matrix** here.

| Q1                                 | Q2                                 | Q3                                 | Q4                                 |
|------------------------------------|------------------------------------|------------------------------------|------------------------------------|
| Activity:                          | Activity:                          | Activity:                          | Activity:                          |
| Benefit to Your Executive Sponsor: | Benefit to Your Executive Sponsor: | Benefit to Your Executive Sponsor: | Benefit to Your Executive Sponsor: |
| Benefit to Your ERG:               | Benefit to Your ERG:               | Benefit to Your ERG:               | Benefit to Your ERG:               |
| Benefit to Your Organization:      | Benefit to Your Organization:      | Benefit to Your Organization:      | Benefit to Your Organization:      |
| Quantify Success:                  | Quantify Success:                  | Quantify Success:                  | Quantify Success:                  |

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

# 6

## BEST PRACTICE #6

### Be Agenda-Driven and Solutions Oriented

#### Best Practices

- **Have a clear agenda for every conversation or event**, with clearly defined positive actions and/or solutions for people to use immediately afterward to enhance their professional lives at your organization. Draw your agenda topics from areas that your members have interest and energy around so that you'll garner strong attendance. Make sure that every agenda has topics that will appeal to all generations in the workplace.
- **Pre-communicate your agenda clearly** so that time-strapped team members will be able to assess whether it's valuable enough to carve time out of their day to attend. **Consider breaking out the "working" portion of the meeting from the "social" part so that people can join for the first "working" portion, then break away if needed due to scheduling pressures.**



#### Put It In Action

Edit and use this template to create and distribute a short agenda before every meeting. Consider keeping all agendas and notes in one shared document so people can easily catch up if they miss a conversation.

| Start Time | Topic  | Leading Discussion | Follow-up (Task + Owner) |
|------------|--|--------------------|--------------------------|
|            | Welcome  |                    |                          |
|            | Recap of our brutally-focused goal for Year One & our progress to measurable success |                    |                          |
|            | [Topics of the day]  |                    |                          |
|            | Preview of next program/ event   |                    |                          |
|            | Opportunities to get more involved   |                    |                          |
|            | Social/ networking time  |                    |                          |

# SECTION II

---

## Unit VII

Ideas that Work –  
A Head Start on Brainstorming  
Your Intergenerational ERG  
Activities

### GOAL:

To provide ideas to  
get you started and  
the resources to make  
it easy for you.



## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## Ideas for Activities to Get You Started

### Now for the fun part!

Here are some ideas for initiatives to get you started. Brainstorm others—and be sure to use your “brutally-focused goal for Year One” as the make-or-break criterion for which ones make your list. Remember that it’s better to have a smaller number of very successful efforts than a wide range of moderately successful ones that spread your volunteers and budget too thin.



**Everything you select should work towards your one, pre-determined and measurable goal for Year One.**

**Strategically, you may want to plan for your Year One activities to address all Four of key types of ERG activities that executives value highly.**  
Each item on this list is coded for them:



**Print or project this list to share with your ERG planning team, and ask each person to choose their “Top 3.”**

Share out and then choose what’s the best fit for your organization!

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

# Initiatives to **raise awareness** about age inclusion

To help you create an Intergenerational ERG dedicated to age inclusion, be sure you consider each step in Elevate's ERG Startup Stairway Tool:

## 1 Host a Lunch and Learn(s)

### Activity Type

EE

TL

CO

- ✓ Offer short, social lunch and learn sessions to introduce best practices for building an age-inclusive team—and be sure to recruit attendees across all ages and career phases. During your conversations, “be sure to encourage people of all generations to speak up and be heard, especially Millennials and Gen Z, and gauge their feelings of age bias against them, which tend to be downplayed relative to bias against older generations.”<sup>79</sup>
- ✓ Use the resources at the AARP Employer Resource Center <https://www.aarp.org/employers> to explore elements of an age-inclusive organization as potential topics for discussion. You can even request an age-inclusive workplace expert from AARP to join your meeting virtually by emailing [employerpledge@aarp.org](mailto:employerpledge@aarp.org).
- ✓ Structure it as a “book club” with short articles to spark discussion on specific topics, including:



- ✓ Why companies should expand their DE&I efforts to include age:  
<https://www.welcoa.org/blog/why-its-important-to-include-age-in-diversity-and-inclusion-efforts/>
- ✓ Why generational stereotyping is a more powerful driver of workplace dynamics than actual generational differences:  
<https://hbr.org/2019/08/generational-differences-at-work-are-small-thinking-theyre-big-affects-our-behavior>
- ✓ Why and how to move away from generational stereotypes towards a life stage or career-phase framing of age diversity.  
<https://www.mindtools.com/pages/article/multigenerational-workplace.htm>

[79] Thomson Reuters. (2021, September 14). How organizations can address ageism as part of their DEI strategy. Thomson Reuters Institute.<https://www.thomsonreuters.com/en-us/posts/legal/addressing-ageism>.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## 2 Co-create a Signature Event to Celebrate Age Inclusion

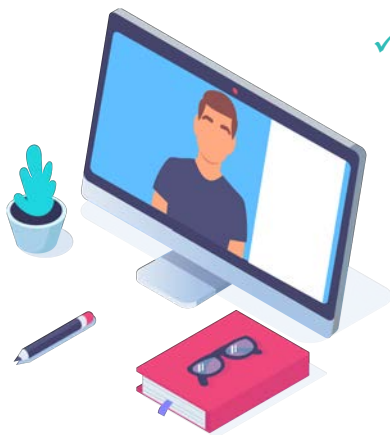
### Activity Type

EE

TL

CO

- ✓ Work with another ERG(s) to co-create a program that can become an annual event for your Age Inclusion ERG effort. You can build it around Celebrate Diversity Month (April), Global Diversity Awareness Month (October), on the “birthday” (founding day) of your organization, or within any heritage or affinity month celebration you already celebrate. Use it to highlight how age inclusion benefits employees of all ages, identities, roles, genders, and levels in your organization. Drive participants to one meaningful action, like completing a brief online training on effectively managing an age-inclusive team.



- ✓ If you have employees who work at more than one location, work from home, or a global team, consider creating a virtual event instead of an in-person event. Or create one core piece of content that you can stream to multiple locations, then host a social conversation at each site immediately after the shared virtual experience.

## 3 Work with Your Internal Communications Team to Share Stories of Age-Inclusive Teams

### Activity Type

TL

CO

- ✓ Nothing sends a stronger cultural message to your employees than the stories their senior leaders share about their own experiences working on an age-inclusive team, especially when they used company policies, benefits, or programs to help navigate a challenging moment in their professional life. Transparency builds trust. Create a series of profiles to share on company social media, career websites, and internal employee communication platforms. Find an ERG member who can partner with HR to write on the company blog about your organization’s work to create an age-inclusive workforce, integrating the senior leader profiles.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

# Initiatives to **drive change** in your organization

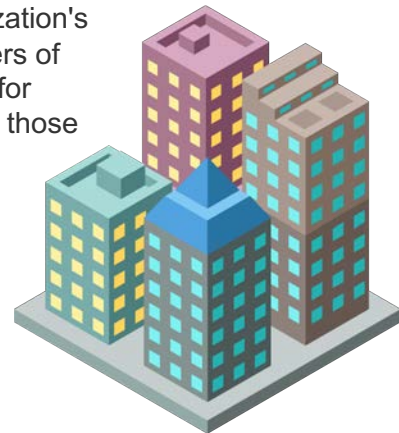
## 1 Do a Gap Analysis of Best Practices and Benefits to Create an Age-Inclusive Workplace

### Activity Type

TL

CO

- ✓ Gather your ERG members for a conversation to see how well your company measures up when it comes to valuing workers of all ages by using AARP's Age Diversity & Inclusion Worksheet to guide the discussion. Find it at <https://employerportal.aarp.org/age-inclusive-workforce/include-age-in-diversity--inclusion>. Then conduct a review of your organization's benefits and policies to ensure they serve workers of all ages and career phases. Develop proposals for how they could be more age-inclusive and bring those to HR.



## 2 Review Your Organization's Recruiting Website and Job Postings

### Activity Type

EE

TL

CO

- ✓ How organizations treat employees in their earliest and latest career phases is a bellwether for how they treat staff overall. Use this article with your ERG members to review your organization's recruiting messaging to see how it can better signal that yours is an organization where workers of all ages and career phases are valued. <https://employerportal.aarp.org/age-inclusive-workforce/follow-age-inclusive-recruitment-practices>. Then sit down with your HR/recruiting team to see if your Careers webpage, job postings, and recruiting event materials feature age-inclusive policies and benefits. Look for imagery that is representative of a wide range of employees of all ages who are thriving in their professional lives at your organization. Check the language used in recruiting materials and job descriptions to see if it gives unintentional messages to potential employees. Use your ERG membership to help shape messages that feel authentic to your workplace.



## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

#### 3 Work with HR to Bring Their Age-Bias Diversity Training Program to Your ERGs Activity

Activity Type

EE

TL

CO



- ✓ Bring focused age-bias diversity training to specific ERG groups, where members are likely to have similar experiences, and conversations are more likely to flow freely when people are talking outside of their formal reporting structure. Research shows that training provided to line managers and engaging employees by forming groups or committees are effective ways to reduce prejudice and change negative attitudes due to their accountability factor.<sup>80</sup>
- ✓ If your HR team does not yet have an age-bias inclusion training, you can host an informal conversation on age bias and its inverse, age inclusion. Ask members to take the Age module within the Harvard Implicit Bias Test and discuss how people map associations unconsciously with the descriptors “young/old.” <https://implicit.harvard.edu/implicit/selectatest.html>

#### 4 Sponsor Manager Training on How to Build an Age-Inclusive Team

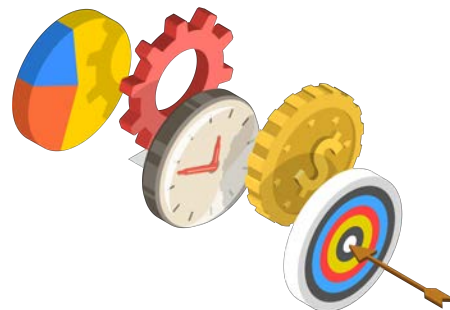
Activity Type

EE

TL

CO

- ✓ Use AARP’s free online Toolkit for Managing Mixed-Age Teams (available at <https://employerportal.aarp.org/age-inclusive-workforce/practice-age-inclusive-management>). It’s a great way to kick off an annual training session for your organization’s managers — or build it into your new hire orientation for employees with supervisory roles. Your ERG can play a leading role with HR in making this happen.



[80] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.98. <https://doi.org/10.1787/59752153-en>

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

#### 5 Create an employee survey to gather annualized data about age inclusion

Activity Type

TL

CO

- ✓ In many organizations, data-driven decisions are key. Make sure your organization has data in hand about how employees' experiences correlate with their age. Invite HR to talk with your ERG about current status and future thoughts on the data your organization uses for DE&I metrics. Focus discussion on how they gather and use information about age diversity, especially intersectionally. Frame the discussion with articles: <https://hbr.org/2021/05/to-make-real-progress-on-di-move-past-vanity-metrics> and <https://hbr.org/2020/12/how-companies-can-meet-the-needs-of-a-changing-workforce>

#### 6 Host an Age Inclusion 101 Session for a Marketing and/or Product Team

Activity Type

NB

- ✓ In a consumer-facing marketing or product development context, provide an age inclusion awareness training for a specific work team, with the goal of helping them design communications and products that are more age-inclusive, and therefore will be more successful in the marketplace. Leverage your ERG members to provide real-time feedback on marketing and product efforts that are in development, so their input can shape decisions made as the teams prepare for market launch. To boost your arguments, reference AARP's Longevity Economy Report to highlight the size of the 50+ consumer market: <https://www.aarp.org/longevityeconomy>.



## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

# Initiatives to **develop and support** your ERG members

## 1 Build the capacity of your ERG members using the Unit V tools

### Activity Type

EE

TL

CO

- ✓ Use the Elevate Tools in Unit V: How to Plan a Successful First Year in this Toolkit as short activities in your usual ERG meetings to build the capacity within your ERG so it can grow and thrive along with its members. Even better, when you create age-diverse small groups to complete the activities together, you're modeling a best practice you want all members to bring back into their regular work teams.



## 2 Offer Financial Planning Session

### Activity Type

EE

- ✓ Ask your company's retirement account provider to host a financial planning workshop highlighting specific financial decisions at key ages and career phases. Motivate your members to join by highlighting the intersectional nature of financial well-being (see the statistics in Unit I about this.) And remember that "it is not just older workers who need such support. Growing concern about employees' financial well-being throughout the lifecycle has prompted more employers to offer support to younger workers. "Emerging adults" have several "social milestones" in early adulthood (e.g., the transition from education, graduation, student loans, parenthood, mortgages, marriage), which elevate their need for support, advice, and flexibility from employers.<sup>81</sup> Consider collaborating with other ERG(s) or HR to host this event for all employees. This is a great way to elevate the profile of your ERG while addressing a nearly universal challenge for employees.

[81] OECD. (2020). *Promoting an Age-Inclusive Workforce. Living, Learning and Earning Longer*, p.97. <https://doi.org/10.1787/59752153-en>.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## 3 Provide resources on how to integrate work and parenting/caregiving

#### Activity Type

EE

TL

CO

- ✓ All career phases intersect with life phases around parenting and caregiving. The challenges of a new parent are similar, whether they are 25 or 40. Bring together current and future parents and caregivers for a How Dual Career Couples Thrive at Work and Home session to share best practices for navigating dual careers, using resources from [www.workableconcept.com](http://www.workableconcept.com). Have a member provide a write-up of the event and share it with HR to post on their talent recruiting website. Add a panel that includes men who have taken their full paid family leave for varied reasons as a way for your ERG effort to support a corporate-wide initiative to increase men's use of family benefits.
- ✓ Host an event on Lifting Barriers for Men to Take Family Leave. Use this report from New America as a conversation starter to discuss what affects men's decisions to use (or not use) the paid leave they are eligible for, and to encourage them to use it: <https://www.newamerica.org/better-life-lab/reports/lifting-barriers-paid-family-and-medical-leave-men-united-states/>. If appropriate, engage your HR team to have a follow-up 1:1 conversation with men across a range of ages and career phases which were eligible for leave in the past 12 months but did not use it all.



## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

#### 4 Provide training on specific professional development skills needed in the next 2-5 years

##### Activity Type

EE

TL

CO

- ✓ Use your ERG to host workplace training. Leverage training already offered by your organization and highly valued by workers and their managers. Ensure that the topics and participation are distributed across all age groups and career phases, but conduct special outreach to older workers within the ERG. Workplace training is vital for all ages but less likely to be offered to and used by older workers.
- ✓ Focus on skills that will be of strategic importance to the organization in the next 2-5 years, so that skill development drives the professional advancement of members. Two suggestions:
  1. **Conduct a session on age-inclusive recruiting and hiring**, with best practices resources on writing job descriptions, recruiting strategies and sources, interview questions, and candidate assessment rubrics that promote an age-diverse workplace. Invite hiring managers among the ERG to bring current job postings for group review and suggestions. Use the resources available via the AARP Employer Resource Center: <https://www.aarp.org/employers>.
  2. **Training on how to make flexible work for both supervisors and direct reports**. Flexible work is key to the morale, productivity, and retention of workers of all ages, especially workers who are caregivers, live with a disability or are older. Many employers now offer flexible or hybrid work options, but they leave the training and the details of how to make it work to the managers. Help both managers and those who work for them navigate it effectively. This can reduce the attrition of both older workers and those caring for kids, adults, or both.

#### As many live longer, some will want or need to work longer.

In order to leverage the strengths of the four-to-five generation workforce, global executives are interested in promising practices related to:<sup>82</sup>

**81%** Lifelong learning

**78%** Financial planning

**73%** Family caregiving

Global executives would implement practices regarding the following if tools and support were available.<sup>82</sup>

**74%** Training & lifelong learning opportunities

**70%** Unbiased recruitment

**68%** Purposely designed mixed age teams

[82] AARP. (n.d.). Living, Learning, and Earning Longer. <https://www.aarpinternational.org/initiatives/future-of-work/living-learning-and-earning-longer>.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## Plan a Successful Event

Events comprise the “bread and butter” of ERGs since interpersonal connection creates impact and improved outcomes. People come first in any organization, and ERGs convene people, so can we provide a structured process of gathering people? The Event Strategy Process provides your ERG with a step-by-step process and a customizable checklist to enhance your ERG event effectiveness. These include essential event elements and elevate them with nuances tailored toward ERGs. Excel further with your events as you tailor the Event Strategy Process with your ERGs, broader organizations, and MarketPlace’s needs and goals. From there, why reinvent the wheel each year with your ERG events when you can replicate and refine your ERG’s Event Strategy Process?

A clear, shared project plan is especially important when collaborating with other ERGs. Here are things to consider when setting up your event:

1. What are your current and common practices when setting up events?
2. What are the common challenges you encounter during these events?
3. Which best practices would you recommend for standardizing all future events?



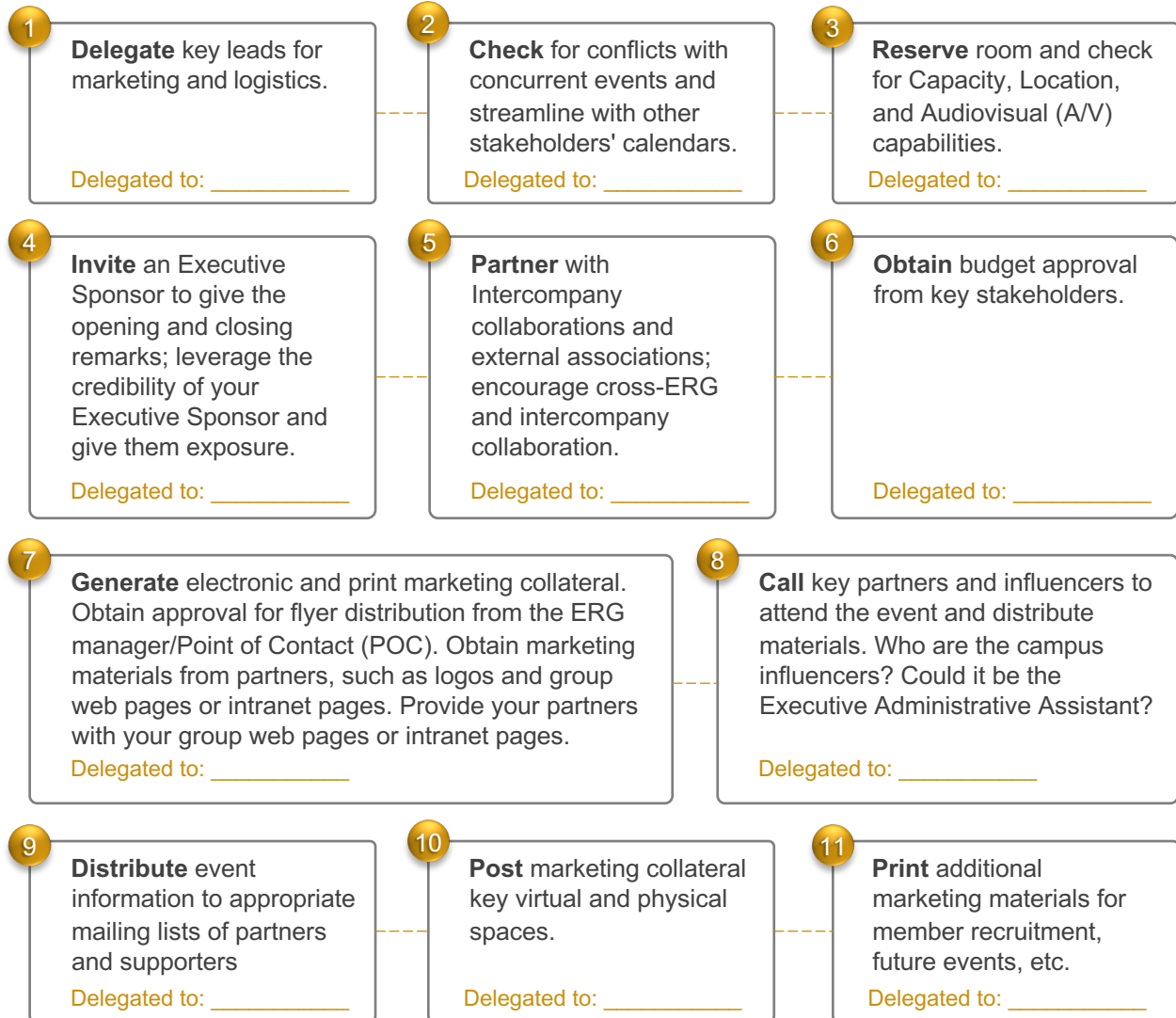
Like the gears that work together, the Event Strategy Process presents three simple, key phases for your ERG events. Think of these as a customizable quality checklist that integrates into a series of easy-to-follow steps that ensure quality. The Tool features a foundation for ERG event excellence, a structured set of actions, and a list to debrief for future refinements. The wise statement of “what gets measured gets done” applies here as the Tool furnishes you with measurable components to achieve your ERG event’s goals.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## Event Strategy Process

### Before the event

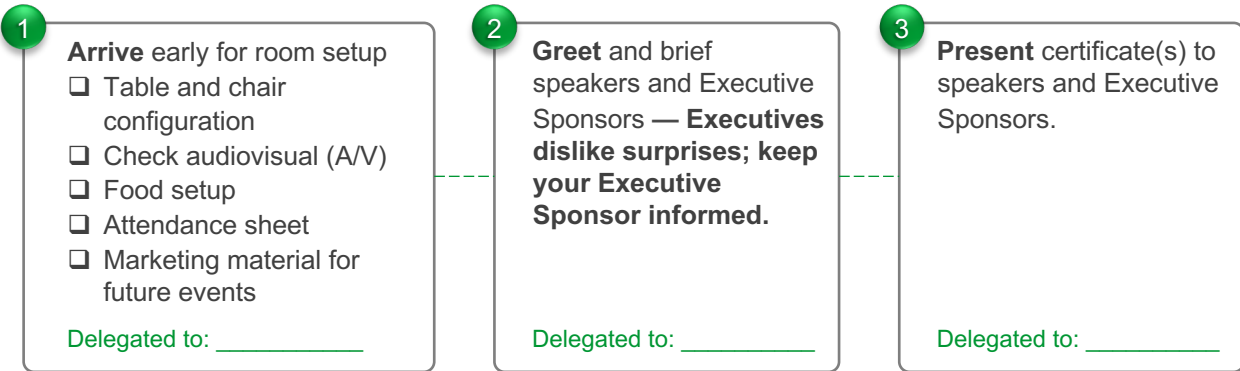




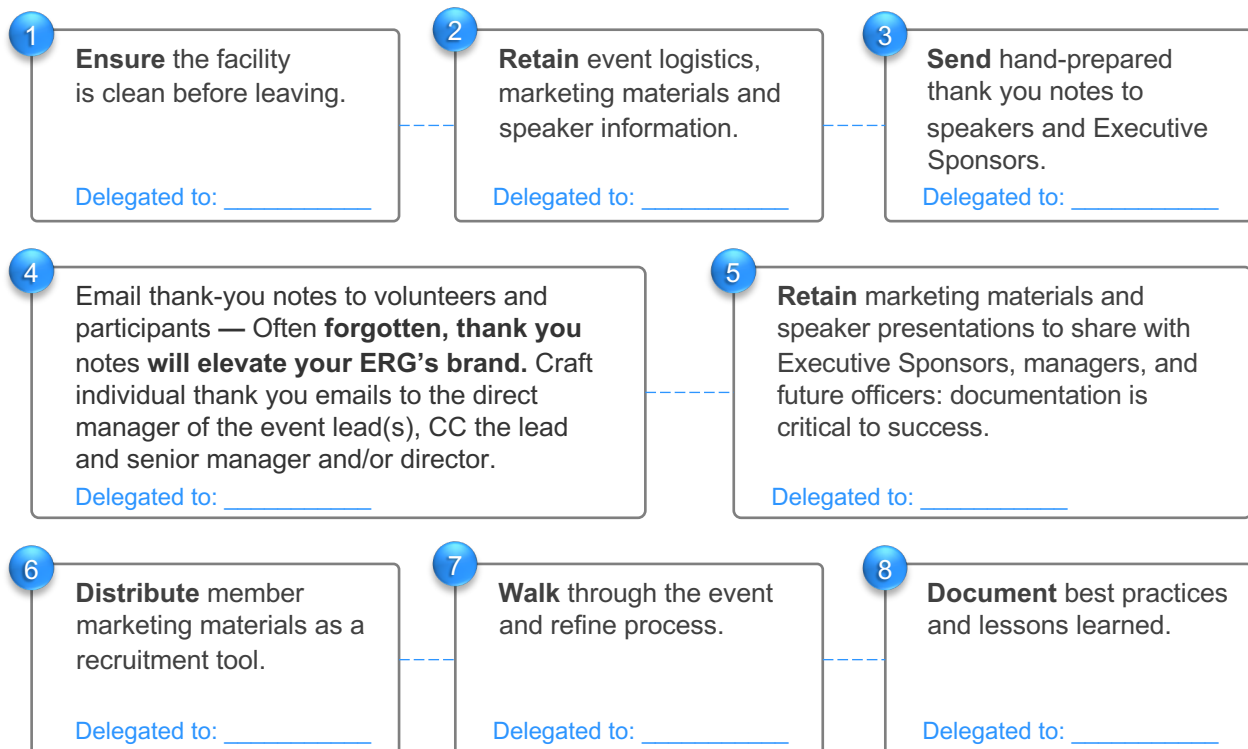
## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## During the event



## After the event



## SECTION II

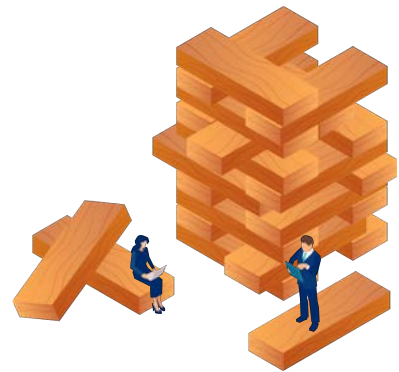
### How to Kick Off Your Intergenerational ERG Effort

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# Manage Risks for a Signature Event

## Best Practices

- **All risks aren't equal.** A risk matrix allows you to rank your most severe risks. All organizations must take on some level of risk to succeed. Regardless, taking calculated risks based on a thorough risk analysis will help organizations take risks that will help them achieve their objectives.
- **All risks don't carry the same impact.** With its prioritization of the most pressing threats, the risk assessment matrix enables professionals to craft a targeted strategy for managing high-risk events. Focusing your attention and resources on the highest risks will benefit your overall business strategy since these risks have the most significant impact and can pose the greatest value losses.
- **Real-Time View of the Evolving Risk Environment.** Risks can emerge and recur, as audit, risk, and compliance professionals are well aware. The risk assessment matrix allows you to identify specific types of risk, their probability, and severity and keep track of how the risk environment changes in real-time.<sup>83</sup>



## Put It In Action

Many professionals confuse risk management and mitigation with not risk-taking or avoiding risks. More so, many think the best entrepreneurs are massive risk-takers. In fact, excellent entrepreneurs take considerable time and effort to assess and understand risks, from macro-risks to micro-risks. They then test and execute with these managed risks. Most outside observers have yet to put in the effort and resources to evaluate these risks, so they view entrepreneurs as “risk-taking.” ERGs are intrapreneurs (entrepreneurs internal to a larger organization).

Your ERGs can innovate and trailblaze on initiatives focused on your affinity in ways that your larger organization have empowered you to do. Invest the effort, resources, and time to analyze the risks of your ERG's initiatives. If you're truly passionate, then apply this passion to deeply and intimately comprehend the risks and manage them. Managing them can go beyond avoiding them, as you can reduce and eliminate them as well. It's often easier to remove and reduce risks than try to accelerate faster and expand broader. Slow down, strategize, and focus on this Tool to simultaneously shrink risks and grow impact.

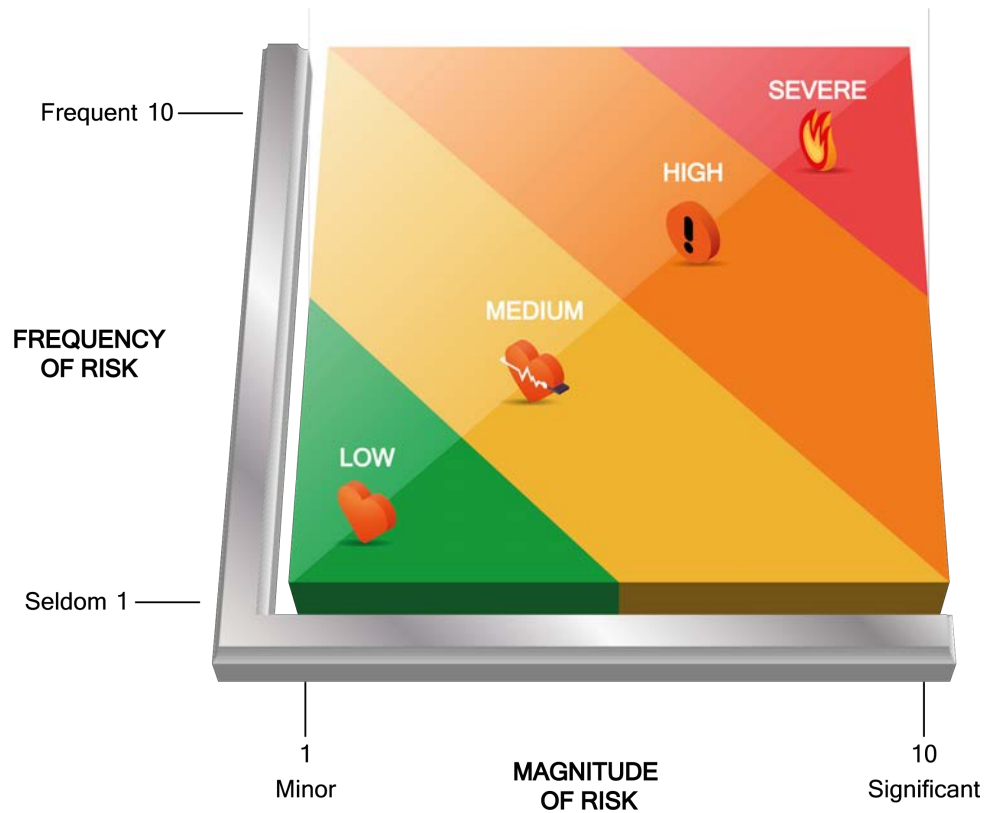
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[83] AuditBoard (2022, March 18). *What Is a Risk Assessment Matrix? And Why Is It Important?* (2022, March 18). [auditboard.com](https://auditboard.com).

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## ERG Risk Management

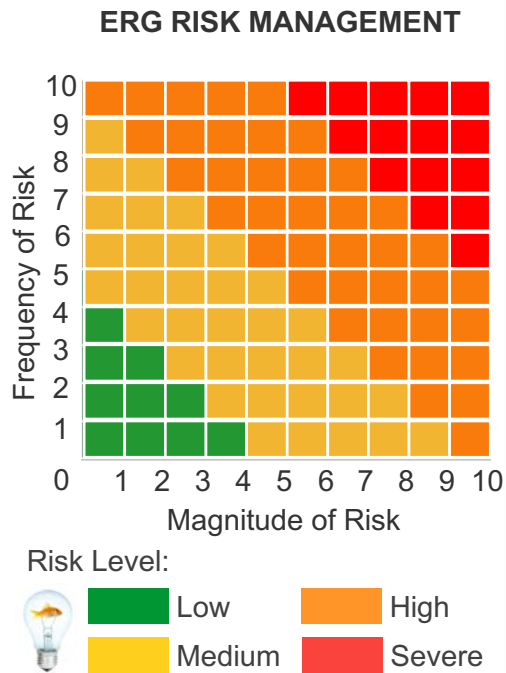


The **ERG Risk Management Tool** features a simple grid that breaks down risk into “Frequency” and “Magnitude.” Like those terms, Frequency means how often a risk occurs, and Magnitude means the level and scale of the risk. When your ERG accounts for both of these variables, you can proceed with projects that have reduced risk and higher success. Follow the instructions to inventory, measure, and plot your risks for each initiative, and your ERG will shine spectacularly!

## SECTION II

### Unit VI: How to Plan a Successful First Year for Your Cross-ERG Initiative

## WORKSHEET



**ERG Initiative:** \_\_\_\_\_

List of risks that could negatively affect the ERG event:

Risk #1: \_\_\_\_\_

Risk Level (Low/Medium/High/Serious): \_\_\_\_\_

Contingency Plan: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Risk #2: \_\_\_\_\_

Risk Level (Low/Medium/High/Serious): \_\_\_\_\_

Contingency Plan: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Risk #3: \_\_\_\_\_

Risk Level (Low/Medium/High/Serious): \_\_\_\_\_

Contingency Plan: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## INSTRUCTIONS

- 1 Write the name of your ERG Initiative.
- 2 List the risks that could negatively affect your event.
- 3 Plot each of the listed risks in the ERG Risk Management.
- 4 Write at what risk level (Low, Medium, High, Severe) they would fall in your ERG Risk Management.
- 5 Write a contingency plan for each risk, but put more of your resources on the Severe and High-level risks.

## DISCUSSION QUESTIONS

- 1 Do the risk levels match the risk landscape in your organization? How much does it compare?
- 2 Did you consider customizing the ERG Risk Management levels to how your organization operates?
- 3 How would you apply ERG Risk Management in prioritizing tasks/risks?
- 4 How do you determine the likelihood of a risk occurring?
- 5 How does ERG Risk Management help you track and see the pattern of risk?

# SINGLE SUCCESS STRATEGY

## Fun and Engaging Learning Programs to Build Generational Awareness

Tired of the talking head Zoom, MS Teams, and Webex meetings? Here are some fun ways to spice things up to drive engagement, build awareness and bring your early and more seasoned talent together:

- **What did you like to eat?** You can do this virtually as a cooking demonstration, or ask people to bring dishes they used to eat in their youth. Then have each person speak about their food item and why it was important to them growing up.
- **Workshop on Intergenerational Differences** in the workplace co-sponsored by both ERGs. Organize a facilitated discussion that asks participants to share what statements or assumptions they have heard that unintentionally may be offensive.
- **Name that show? Or You used to watch what?@&!**  
Have people share clips of their favorite tv shows or cartoons. The audience has to guess the participants have to tell a story about why the show was relevant to them growing up. Ask questions about the era, the current events of the time, the unfolding social issues, etc.
- **Virtual BINGO events.** These aren't your traditional events where you place a dot on a number. Create Bingo Cards that contain current terminology or not so recent (i.e., Cool Beans, TGIF, etc.) and put them on cards. Then in a bowl, mix the words up and call them out. Fill up the card and you win.
- **Host a Game Night.** If your company meets in person, create a place of play where groups can gather to bring and play games from different eras like the '40s, or '70s and. bring and play games from different eras like the '40s, or '70s. The rule is before they start to play, the owner must talk about the origin of the game and the era played in. You can do a timed game played with 1 to 2 rounds, then people must rotate to the next game.



**Nereida (Neddy) Perez**  
VP Global DE&I



**Jennifer McMillion**  
Sr. Manager, Global DE&I

**McCormick & Company**

# SECTION II

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## Unit VIII

Build for Scalability Using the  
ERG Leadership Model



### GOAL:

To introduce Elevate's  
Tools to help you craft an  
approach that can be easily  
scaled to engage more  
ERGs, senior executives  
and employees in future years.



## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

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## Organizations Increasingly Expect ERGs to Collaborate towards Shared Goals

As you create your Intergenerational ERG effort, start early to keep an eye on how to ensure it is sustainable so it can lead to long-term success. Here are a few Tools to help you do so.

When you have a meeting with the core leaders of your ERG effort, talking through these is a valuable way to identify and address some of the challenges that may arise. For the full version of each Tool, inquire with Elevate.

You can also use these Tools as activities for your Year One plans of your Age Inclusion ERG initiative. They were chosen because they are precious conversations to host across groups of all ages and career phases.

For an additional set of Tools (The Growth Mindset, Capacity Cells, and the Burnout Meter), visit Unit VI of the Caregiving ERG Toolkit at <https://www.aarp.org/content/dam/aarp/caregiving/pdf/2020/caregiving-erg-toolkit.pdf>.





## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

# 1 Empathy Action Roadmap

Empathy is key to building an age-inclusive workplace and creating a successful ERG initiative. To spark discussion and action to build empathy, use Elevate's Empathy Roadmap. You can use this independently, with your ERG initiative leadership team, or with your full ERG membership.

## Best Practices

- **Be self-aware.** Develop your ability to understand your emotions and your way of expressing them.
- **From self-awareness to self-motivation.** Use emotions to facilitate performance by routing feelings towards constructive activities and personal performance.
- **Pay attention.** Identify patterns and signals when interacting with people from diverse cultures—being distracted limits our ability to feel empathy.
- **Learn how to empathize.** Perceive and understand the emotions of those around you to adjust to each situation objectively.



## Put It In Action

In recent decades, logical intelligence, or IQ, has been complemented by Emotional Intelligence, or EQ. One key element of EQ emphasizes empathy, defined as the ability to understand and share the feelings of others. Can we distill empathy into key areas and apply these areas to exhibit even more empathy? With the Empathy Action Roadmap (EAR), your ERGs will empower others as you exemplify empathy (and yes, the EAR relates to “lending an ear,” which proves necessary with empathy).

The best leaders practice and live their lives with empathy because if they understand others, they can align others better to a greater goal—and ideally, the greater good. More fundamentally, empathy relieves negative emotions by sharing and distributing these stressful burdens. Lend the ERG EAR as you leverage your ERG to build leaders.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## Empathy Action Roadmap

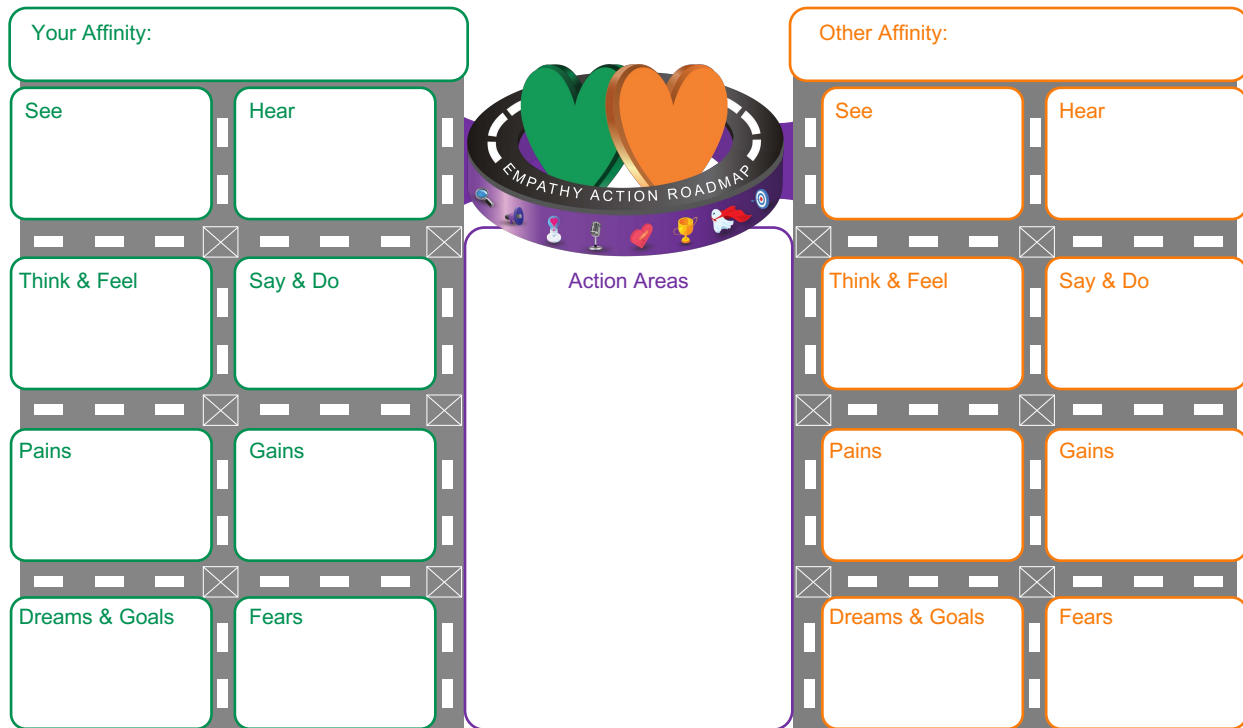
Divide empathy into core components of others' experiences, and you will discover a path toward sharing others' emotions. This builds bonds and aligns you and your ERG stakeholders. Rather than view others' emotions as a nebulous entity, the **Empathy Action Roadmap (EAR)** encourages you to document these elements one at a time. Taken together, the EAR will help you reduce fear, prevent a tear, and support a peer. Lend an ERG EAR.



## SECTION II

### Unit VI: How to Plan a Successful First Year for Your Cross-ERG Initiative

## WORKSHEET



The worksheet is titled "EMPATHY ACTION ROADMAP" and features a central graphic of two overlapping hearts (green and orange) on a purple circular base with icons. The layout is divided into three main sections: "Your Affinity" (green border), "Other Affinity" (orange border), and "Action Areas" (purple border). Each of the "Your Affinity" and "Other Affinity" sections contains a 2x4 grid of boxes labeled: "See", "Hear", "Think & Feel", "Say & Do", "Pains", "Gains", "Dreams & Goals", and "Fears". The "Action Areas" section is a large purple box in the center.

| Your Affinity: |          | Other Affinity: |          |
|----------------|----------|-----------------|----------|
| See            | Hear     | See             | Hear     |
| Think & Feel   | Say & Do | Think & Feel    | Say & Do |
| Pains          | Gains    | Pains           | Gains    |
| Dreams & Goals | Fears    | Dreams & Goals  | Fears    |

Action Areas

## INSTRUCTIONS

- 1 In the **top green box**, write your affinity.
- 2 Identify **your affinity needs**: What do you see? Hear? Think and Feel? Say and Do? Pains? Gains? Dreams and Goals? Fears?
- 3 Write the other affinity in the **top orange box** (different or opposite from your affinity).
- 4 Identify **their affinity needs**: What do they See? Hear? Think and Feel? Say and Do? Their Pains? Their Gains? Their Dreams and Goals? Their Fears?.
- 5 Write three action points based on your learnings from empathizing with the other affinity on the **purple box**.

## DISCUSSION QUESTIONS

- 1 What are the challenges you've encountered when trying to empathize with others?
- 2 What can organizations do to leverage and support different affinity talents and needs so that they will let you know it's okay to be with your authentic selves?
- 3 How can the Tool help you lead and collaborate with team members of different diverse contexts?
- 4 How does your empathy improve your ability to lead a team of diverse backgrounds?
- 5 Which is more ideal: conducting yourself to be easily understood or conducting yourself to understand others?

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## 2 The Intelligence Flow Indicator

The key to building an age-inclusive workplace is for team members to be open to identifying their own biases or noticing stereotype threats in the workplace. One common bias and stereotype suggests that the capacity to learn decreases as people age. While research suggests that younger employees may learn new things more quickly, it also suggests that older employees are better able to connect across ideas, initiatives across time, and a broader and deeper personal network to drive innovation. The difference between these learning styles is in the type of intelligence used – younger brains have greater fluid intelligence while older brains possess more crystallized intelligence. Use Elevate's Intelligence Flow Indicator Tool to generate discussions on how each type of intelligence benefits your organization and whether they are perceived differently. Does your organization prize one type over the other? Perhaps some balance is needed.

### Best Practices

- **Employees can learn from one another by forming age-diverse teams in the workplace.** Younger employees can educate older employees on using new technologies and practices, while more senior employees can transfer information obtained through experience. The opportunity to push and motivate one another benefits both parties. As a result, ERG Groups should look for chances for intergenerational teams to work on projects wherever possible.



### Put It In Action

Researchers have discussed Crystallized Intelligence and Fluid Intelligence. They link the former to structured, solidified older adults, while they associate the latter with flexible, adaptable, and younger folks. There is a biased tendency to favor Fluid Intelligence over Crystallized, yet this dismisses the value of Crystallized Intelligence and limits the benefits that organizations and society can reap from it.

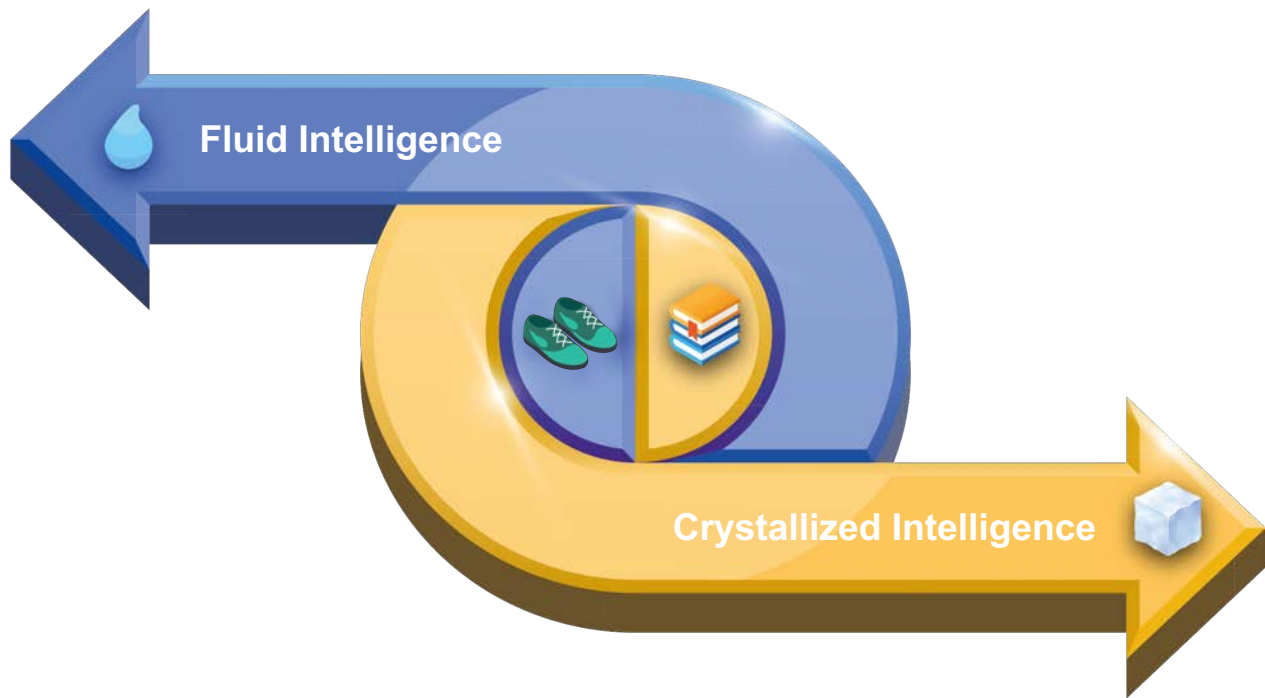
As we age, we gain wisdom, encompassing contextual worldviews, pattern recognition, seasoned judgments, positive habits, heuristics (adaptable shortcuts), and more. All these and beyond come with Crystallized Intelligence which ERGs can value and leverage. Younger generations will likely exhibit Fluid Intelligence, which indicates more neuroplasticity, adaptability, resilience, openness, fresh innovation, a blanker canvas to craft new experiences, and much more. These types of intelligence prove useful as a “this and that” rather than “either/or” perspective. Your ERGs can function as a conduit to bridge these different intelligences as you bridge generations—for the benefit of many stakeholders.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

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## The Intelligence Flow Indicator



The **Intelligence Flow Indicator Tool** features Crystallized and Fluid Intelligence as a spectrum rather than absolutes. The Tool's permeable rather than rigid approach to these types of intelligence encourages ERGs to collaborate across generations and access the best of these diverse populations. This approach takes an abundance, rather than scarcity, mentality so that your ERGs can draw from a deeper and wider range of resources.

## SECTION II

### Unit VI: How to Plan a Successful First Year for Your Cross-ERG Initiative

## WORKSHEET

Fluid Intelligence

Crystallized Intelligence



## INSTRUCTIONS

- 1 Print the worksheet and share it with your diverse and generational group.
- 2 List the types of work activities optimal under each kind of intelligence.
- 3 In a safe place, compare and contrast your answers with the group.
- 4 Discuss with your group: Where were your answers different? Why were your answers different?

## DISCUSSION QUESTIONS

- 1 How did your discussion go? Did you have a fruitful conversation about each other possible biases?
- 2 How would your new answer compare to your answers before if you answered the worksheet now?
- 3 How would you apply what you learned in leading your age-diverse ERG?
- 4 What immediate action steps can your organization take to decrease generational-related issues in the workplace?

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## 3 The Purpose Paradigm Pivot Point

As an individual and ERG leader, you'll be most motivated and effective when you are connected to your purpose. Use Elevate's Purpose Paradigm Pivot Point to refine your personal mission statement, align your passions with your organization's priorities, and help reveal how you can leverage your core competencies in service to the ERG's success.

### Best Practices

- **Know Your Why.** Reflect and revisit this question of "why" you do what you do professionally at work and with your ERG.
- **Your purpose will change.** Meaning and purpose will continually change, so don't fear losing your core.
- **Look forward.** Forecast with vision and deliberate, focused purpose lies at the root of strategic thinking. Leverage this to achieve better strategic results.



### Put It In Action

Growing bodies of research correlate purpose in organizations and professionals with engagement, health, and performance. How can you systematically break down purpose to better define, refine, and align it to your organization's and community's purpose? This mission and vision beats at the heart and soul of Elevate, as we believe in co-creating and cultivating your purpose with a grander purpose.

How can you engage your purpose with external experiences, contexts, and insights to further pivot your paradigm (or worldview)? You've likely heard the term "paradigm shift." A paradigm constitutes the worldview of a particular community, which in this case, includes your purpose and your ERG's purpose. A community paradigm shift occurs when an external experience or insight challenges these worldviews. This reflects dialogue, interactions, collaborations, and even challenges. This Tool focuses on subtle shifts or pivots rather than focus on a seismic shift in your paradigm. We learn and grow every day through interactions with the world around us. Instead of worrying about a larger shift, the pivots can culminate into these paradigm shifts. Live a life of paradigm pivots, and your ERGs will instill gradual changes that make your world, and the world, a better place.

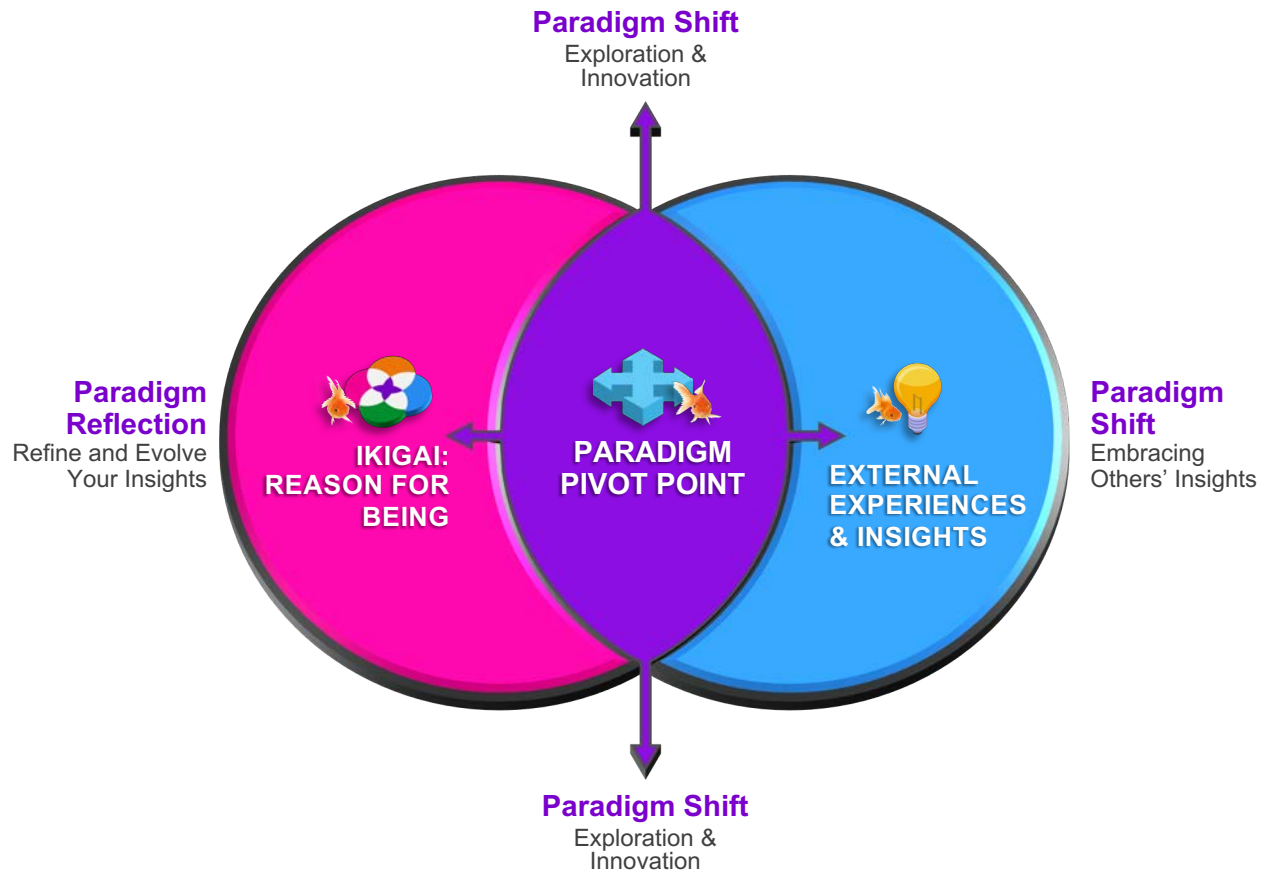


## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

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## The Purpose Paradigm Pivot Point



The **Purpose Paradigm Pivot Tool** provides key parts to lead your ERG and its stakeholders toward large or small changes. We encourage your ERG to celebrate the nuanced changes or pivots while you strive to succeed with sea changes. Trust the process, and you'll truly embrace the wide range of changes your ERGs make, from granular to grand.

## SECTION II

### Unit VI: How to Plan a Successful First Year for Your Cross-ERG Initiative

## WORKSHEET

### 1 IKIGAI: REASON FOR BEING

What you Love

What the world needs

What you are good at

What you are paid for

PASSION

MISSION

VOCATION

PROFESSION

IKIGAI

### 2 EXTERNAL EXPERIENCES & INSIGHTS

- 1
- 2
- 3
- 4
- 5

### 3 PARADIGM PIVOT POINT

## INSTRUCTIONS

- 1** **IKIGAI.** Determine what you **love**, what the **world needs**, what you're **paid for**, and what you are **good at**. List them in the outer sections.
- 1b** **IKIGAI.** List your mission, vocation, profession, and passion in the intersections.
- 1c** **IKIGAI.** Assess your Ikigai diagram. Encircle the area that is the most reflective of your current disposition.
- 2** **EXTERNAL EXPERIENCES & INSIGHTS.** List experiences and insights that you learn when interacting with other generations.
- 3** **PARADIGM PIVOT POINT.** Write Paradigm Pivot action steps you'll take considering your Ikigai and External Experiences & Insights.

## DISCUSSION QUESTIONS

- 1** Why will finding your Purpose Paradigm Pivot Point help you live and succeed better as a professional?
- 2** How can you better align your core competencies, experiences, and insights to your Ikigai?
- 3** How can you share this Tool with your colleagues to get better mutual results and build teams?
- 4** Why? And yes, the single-word question still stands as one of the ultimate that can lead us to all types of answers in our lives.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## 4 ERG Leader Bio Builder

All ERG members are leaders in their teams. As such, everyone should have a professional biography they can use to create a personal brand, become known more broadly in the organization and industry, and generate new professional opportunities. It's essential to craft your bio to head off potential age bias—especially for younger, older, and BIPOC employees who research shows are more likely to encounter more age bias in action. Regardless of the person's age, professional bios should be concise, focus on key roles, accomplishments, and skills, and incorporate the most current terminology to avoid potentially damaging age-based assumptions. Bios should reflect the elements most relevant to the career path each member is striving to cultivate, rather than an exhaustive history, and should include the most recent examples of “wins” or impact.

### Best Practices

- **Be genuine.** Allow your language to show your personality by writing your profile in various styles. Write as if you're having a networking discussion with the reader. How do you want to approach that conversation? Include a professional headshot to take it a step further.
- **Edit with zeal.** Read each piece aloud in your voice as you experiment with different writing styles. Is it authentic to your personality? One of the most significant pieces of career content you'll write is your professional bio. Request that someone you trust read it and provide feedback. Make drastic changes if you believe your draft executive bio is drifting away from who you are. Do not be frightened to start over.



### Put It In Action

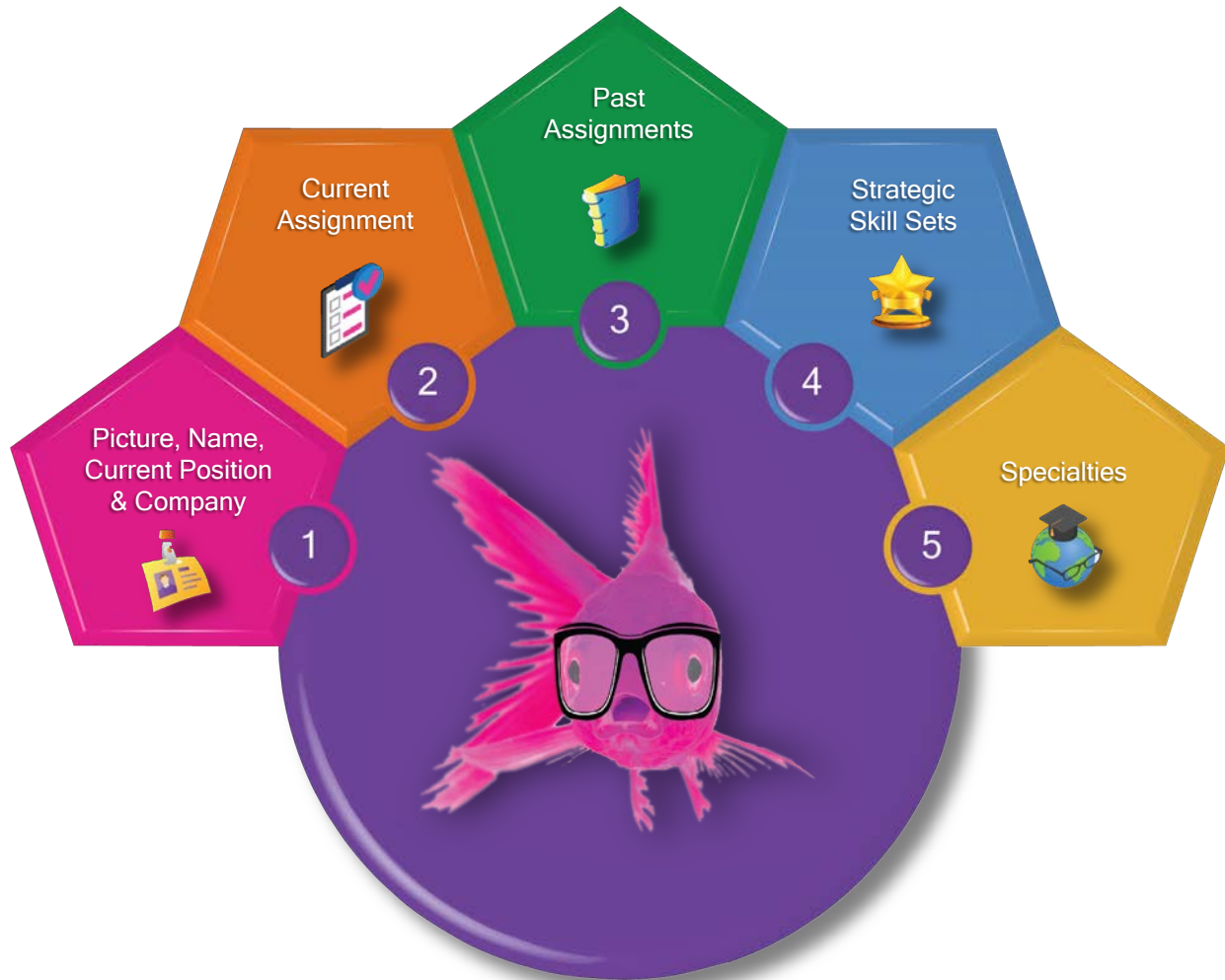
ERG leaders tend to help others so that they often spend less time on their own leadership needs. One key component of leadership is how ERG leaders show up externally to your organizations. Most professionals have resumes, but leaders often have bios summarizing broader and more personalized achievements and roles.

Go ahead and give a little gift to yourself in the form of a bio. There are core elements of a bio that highlight your best, which will help ERG leaders shine with their best foot forward in the MarketPlace.

## SECTION II

### How to Kick Off Your Intergenerational ERG Effort

## ERG Leader Bio Builder



The **ERG Leader Bio Builder Tool** systematically supports you for public interactions. It presents a framework with critical parts that culminate into a bio that the public can easily understand and value. Inventory these key parts and take the time to enhance the language once you've selected the best of who you are to place in your bio.

## SECTION II

### Unit VI: How to Plan a Successful First Year for Your Cross-ERG Initiative

## WORKSHEET



**John A. Doe**

1  
Picture

2  
Name

Vice President, Chief Diversity Officer, ACME, Inc.  
Los Angeles Regional Council Volunteer Co-Chair  
Southern CA Leadership Network Chapter Chair  
Los Angeles Associate Engagement Co-Chair

3  
Current  
Position &  
Company

Doe serves on the national boards of the following organizations: American Heart/Stroke Association's Diversity Leadership Committee and Health Equity Taskforce, American Leadership Council for Diversity in Healthcare (ALCDH), The Institute for Diversity and Health Equity, and a member of the National Association for Latino Healthcare Executives (NALHE). He also serves on the following local boards: Employ Milwaukee-the Milwaukee Area Workforce Investment Board (MAWIB), Junior Achievement, La Causa, Inc., Nativity Jesuit Academy, and Waukesha County Land Conservancy.

4  
Current  
Assignment

In his previous role, Doe served as the Chief Diversity & Inclusion Officer for ACME, Inc., MA, from November 2012 to June 2015. He provided direction to the Office of Diversity & Inclusion. He led the strategic initiatives system-wide that included: Business Employee Resource Groups (BERGs), Diversity Council, Leadership Development Initiative, Diversity & Cultural Competence Education, Supplier Diversity, and New England's premier Diversity Conference.

5  
Past  
Assignment



Doe has over 10 years of business leadership experience in multinational environments, having lived and held executive positions on four continents. During his career, Doe has built a reputation for operational excellence, innovative strategic thinking, working with the highest level of integrity, and a deep and passionate commitment to the company.

6  
Strategic  
Skill Sets

Doe has significant expertise in program affordability. He balanced cost, schedule, risk, and performance to find the best value solutions. Key assignments Doe held included: Affordability Lead/support for effective programs - Future Combat Systems (FCS), Ground Mobile Radios (GMR), SBInet, Concept Exploration and Refinement (CER); Proposal Manager/support on several strategic programs - Netcentric Compliance Test Tool (RFP), Solar Array Constraint Engine (RFQ) and Fully Reusable Access to Space Technologies (FAST RFI).

7  
Specialties

Doe is married and has 4 children. They live in Miami, Florida, along with their dogs, Nicko and Bryan. Being a firm believer in the power of positive thinking in the workplace, Doe regularly develops internal wellness campaigns to assist employees with good mental health techniques. Doe also enjoys a good Netflix binge but can also be found on long bike rides on hilly country roads.

8  
Additional  
Section:  
Personal Info

## INSTRUCTIONS

- 1 Attach your professional picture. Write your name, current role, relevant experience and prior or current board experience.
- 2 Include your strategic skill sets and specialties.
- 3 Feel free to add sections and move some fields around, as preferred by your audience.

## DISCUSSION QUESTIONS

- 1 How do your bio compare to the bio in the worksheet?
- 2 What sections would you add to your bio to make it pop more compared to your peers?
- 3 How important is it to customize your Bio to your audience?



# SINGLE SUCCESS STRATEGY

## The “I’s Have It: Intergenerational & Intersectional Impact

Intergenerational collaboration delivers much value, such as shared insights, wisdom, and trust. These synergies extend well beyond generational impacts, as they inherently intersect other areas of organizations. This intersectionality includes other “inter” partnerships, such as inter-departmental, inter-program, and inter-team collaboration across your organization. This intergenerational and intersectional global view leads to an even broader impact while breaking down barriers and building bonds. Here are specific strategies to implement this insight:

- **Engage Other Organizational Operations Systematically.** Actively reach out and learn about other units, programs, departments, and teams across your organization. Make it systematic, as you make a list of these different components to have a broader map of “who does what.”
- **Outreach Organically.** Remember to keep it “organic” as this word serves as the root of “organization” and people come first. Get to know your colleagues as more than roles and let them organically introduce you to their stakeholders.
- **Ask and Attentively Listen.** True learning about others’ groups takes more than listening but attentive listening. Ask both foundational and thoughtful questions as you actively take notes. Share these notes with others in your group and with those you learned from—like oral history and absorbing like a new hire. This invigorates you with more insights and honors the other teams’ time toward educating you. More so, you’re creating a broader network of trusted teammates.



**Wil Lewis**  
Chief Diversity,  
Inclusion & Belonging Officer



**Shannon Snowden**  
Global Head of DEI  
Learning & ERGs

**Experian**

# RESOURCES

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GOAL: To provide vetted sources for additional programs, skills, and organizations that you can leverage to create powerful Intergenerational ERG initiatives.





## RESOURCES

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### ERG Resources

*As you guide your organization's decision-making around Age Inclusion ERG efforts, this cheat sheet of additional resources can provide other statistics, ideas, and best practices.*

#### From AARP

Find all of AARP's resources for employers to create age-inclusive workplaces here: <https://www.aarp.org/employers>.

**Speakers for your events.** If you would like AARP to present on age diversity and inclusion topics, take advantage of our free tools and resources, or discuss strategies in which you as the employer or Human Resource professional can promote age inclusion across your organization, email [employerpledge@aarp.org](mailto:employerpledge@aarp.org) to request.



"As people live, learn and earn longer, AARP is committed to working with businesses to help them reap the benefits of a multigenerational workforce where people can continue to work for as long as they need or want to," AARP CEO, Jo Ann Jenkins<sup>82</sup>

#### From Workable Concept

Workable Concept works with employers to create family-friendly workplaces, with employees to create strategies that let them thrive at work and home, and with business and social sector, leaders to create the products that make it all possible. Resources that ERGs can leverage for events, panels, and activities are at [www.workableconcept.com](http://www.workableconcept.com).

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[82] Terrell, K. (2021, March 4). AARP Launches New Digital Tool to Help Employers Build Age-Diverse Workforce. AARP. <https://www.aarp.org/work/employers/growing-with-age>.

### From the ERG Economy by Elevate

#### What is the **ERG ECONOMY**?

by **ELEVATE**

##### **Vision**

As an Elevate initiative, The ERG Economy convenes cross-industry stakeholders of Employee Resource Groups (ERGs) to share and co-create innovative, leading-edge insights that benefit the overall ecosystem and economy of ERGs.

##### **Mission**

To achieve our vision, The Elevate ERG Economy Initiative co-creates:

- Strategies and solutions to maximize ERG impact, development, and innovation
- Practical Tools, such as our signature ToolBooks and other publications
- Research on ERGs that leverage shared information and insights from many stakeholders
- Communities of Practice to jointly forge innovative solutions and share best practices

We aren't a one-stop shop. We are a hub. We are a hub that convenes cross-industry stakeholders, collects shared insights, and co-creates thought leadership.

A one-stop shop ceases. A hub continues. Join our hub and continue to evolve and Elevate your ERGs with a holistic hub of partners.

The ERG Economy is an initiative of Elevate.

Find resources for the Elevate ERG Economy, events, and membership information for Elevate's consortium <http://www.ergeconomy.com/>

## RESOURCES

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### From Other Organizations

A Toolkit for Establishing and Maintaining Successful Employee Resource Groups

<https://www.viscardicenter.org/wp-content/uploads/2016/09/The-Toolkit-for-Establishing-Groups.pdf>

PepTalkHer How to Start an Employee Resource Group (with lots of checklists)

<https://static1.squarespace.com/static/5c6c805f94d71ae783e929e0/t/5d38a7b4185634000135c39b/1563994045217/PepTalkHer+How+to+start+an+ERG+Guide.pdf>

Catalyst Resources for Employee Resource Groups

<https://www.catalyst.org/research/employee-resource-groups-resources/>

Are Employee Resource Groups Good for Business?

<https://www.shrm.org/hr-today/news/hr-magazine/0916/pages/are-employee-resource-groups-good-for-business.aspx>

Cisco's Resource Guide for Developing and Sustaining ERGs

[https://www.cisco.com/c/dam/en\\_us/about/ac49/ac55/docs/RESOURCE\\_GUIDE\\_external11\\_2010.pdf](https://www.cisco.com/c/dam/en_us/about/ac49/ac55/docs/RESOURCE_GUIDE_external11_2010.pdf)

# Need More Data? Use these Key Research Sources

## OECD and AARP Report Promoting an Age-Inclusive Workforce: Living, Learning and Earning Longer

<https://www.oecd.org/publications/promoting-an-age-inclusive-workforce-59752153-en.htm> offers strategies businesses can use to ensure that all employees are getting the opportunity to fully contribute and grow.

The same project developed the Growing with Age digital learning platform for employers

<https://www.aarpinternational.org/growingwithage?CMP=RDRCT-PRI-WORKJOBS-120420>

## AARP Research

AARP Research uncovers compelling insights on the 50+ population through groundbreaking research. We inform thought leaders internally and externally with strategic insights about the needs, market conditions, and trends impacting the 50+ to fulfill AARP's mission of providing Real Possibilities for Americans 50+. Visit

<https://www.aarp.org/research/> to learn more.

### Acknowledgments

## What is **ELEVATE**?

Elevate is a multi-university partnership, along with Spectrum Knowledge and the University of California Office of the President—MESA. We cross-pollinate industry and academic innovation for inclusive and diverse leadership. One unified phrase embodies both our mission and vision:

**PURPOSE + PEOPLE = PURPLE**

Elevate helps you define, refine, and align your purpose with your organization's purpose.

For more information, contact: Vu H. Pham at (714) 686-0875 or [vupham@spectrumknowledge.com](mailto:vupham@spectrumknowledge.com)



AARP is the nation's largest nonprofit, nonpartisan organization dedicated to empowering Americans 50 and older to choose how they live as they age. With nearly 38 million members and offices in every state, the District of Columbia, Puerto Rico and the U.S. Virgin Islands, AARP works to strengthen communities and advocate for what matters most to families with a focus on health security, financial stability and personal fulfillment. AARP also works for individuals in the marketplace by sparking new solutions and allowing carefully chosen, high-quality products and services to carry the AARP name. As a trusted source for news and information, AARP produces the nation's largest circulation publication, AARP The Magazine, and the AARP Bulletin. To learn more, visit [www.aarp.org/employercaregiving](http://www.aarp.org/employercaregiving), [www.aarp.org](http://www.aarp.org) or follow @AARP and @AARPadvocate on social media.

## Workable Concept

**Advising leaders who are building a world where employees with caregiving responsibilities can thrive.**

We consult with employers nationwide to create caregiver-friendly workplaces, coach employees to create strategies that let them thrive at work and home, and collaborate with business and social sector leaders to create the products that make it all possible. Our approach is grounded in a belief that all parents and working family caregivers deserve to work in an environment where they can achieve bold career goals, and to come home to the support and partnership that makes life sustainable. To learn more, visit [www.workableconcept.com](http://www.workableconcept.com).







